

STRATEGIC STEWARDSHIP FOR MAJOR & PRINCIPAL DONORS

#AItraining



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LEARNING OUTCOME


After participating...


...you will be able to better develop a strategic stewardship plan for your highest-level donors.




 AGENDA


- Strategic Stewardship in Practice
- Eight Areas of Engagement
- Walkthrough: Sample Strategic Stewardship Plan

 3

 POLL


How many staff are assigned to
this project at your institution?

 4



POLL

How many stewardship plans
to you have?



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STRATEGIC STEWARDSHIP IN PRACTICE



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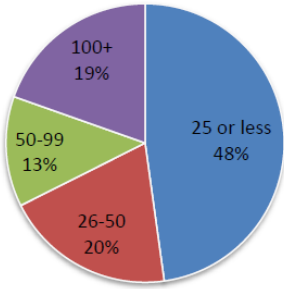
■ **SETUP IS KEY**

- Who will manage the portfolio
- How will communication be delivered?
- What are the basics?
- What is the ROI of the effort?

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■ **SURVEY SAYS...**

If your organization has custom/individual stewardship plans, how many donors are included?



Donor Count Range	Percentage
25 or less	48%
26-50	20%
50-99	13%
100+	19%

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IF YOU CAN HAVE MORE THAN 25...



STEP 1

Google lynne@donorrelationsguru.com

Alerts

Search query:

Result type:

How often:

How many:

Deliver to:

[CREATE ALERT](#) [Manage your alerts](#)

Monitor the Web for interesting new content
Google Alerts are email updates of the latest relevant Google results (web, news, etc.) based on your queries.

Enter a search query you wish to monitor. You will see a preview of the type of results you'll receive. Some handy uses of Google Alerts include:


- monitoring a developing news story
- keeping current on a competitor or industry
- getting the latest on a celebrity or event
- keeping tabs on your favorite sports teams

Manage your alerts - Google Alerts Help - Terms of Use - Privacy Policy - Google Home - © 2017 Google

■

STEP 2


- Complete giving history
- Preferences, don't step in it!
 - Names
 - Seating
 - Flowers
 - Children
 - Ex-spouses
- Event information

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■

OTHER
INFORMATION
TO INCLUDE

- Looking ahead
- Gift agreement requirements
- Most recent efforts
- Gleaning from contact reports
- Important dates and names
 - Birthday
 - Anniversary

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Lynne is decisive, energized by ideas, and overlooks details, so stick to the big picture and get to your point quickly.

ESTJ

Accuracy confidence: 95%

We found lots of online data for Lynne, so we're quite sure of this.
Where does this come from?

Strategic Ideation
Significance
Competition
Futuristic

When speaking to Lynne...

- Use self-deprecating humor (don't take all the you take yourself too seriously)
- Emphasize the future
- Don't ask her to explain something in detail
- Don't trust that she will follow specific verbal instructions

When emailing Lynne...

- Use emotionally expressive language
- Write with short, casual language and abbreviations
- Don't ask her something that will require a long, thoughtful response
- Don't provide lots of detailed information and instructions

When working with Lynne...

- Recognize her achievements verbally
- Send a reminder the day before
- Don't expect a long time to earn her trust
- Don't get frustrated if she is

When selling to Lynne...

- Tell a past customer story instead of listing features
- Use metaphors to explain a concept
- Don't set an end time for calls or meetings
- Don't worry about asking for permission before calling

It comes naturally to Lynne to...


- Consider social events a high priority
- Immediately feel comfortable speaking to a new person
- Openly discuss emotions
- Forget something important

STRONGEST BEHAVIORS

Lynne's PI Pattern is extremely wide, which means that her behaviors are very strongly expressed and her needs are very strongly felt.

Lynne will most strongly express the following behaviors:

- Strongly venturesome in taking risks and focusing on the future; she's almost exclusively concerned with where she's going rather than either how she'll get there, or where she's been. Very adaptable; solves problems as they occur rather than through advance planning.
- Makes decisions and takes action, even when there's an absence of proof confirming her decision. Comfortable operating outside of traditions, she pursues strongly innovative ideas, even in the face of failures or popular opposition.
- Remarkably independent. Resists authority and proven, 'by the book' methods in favor of her own ideas.
- Intense proactivity and aggressiveness in driving to reach her goals. Actively and boldly challenges the world, her business, and even others' areas within her business.




STRATEGIC HABITS

- Create a system that is invisible
- Good content wins the day
- Basic information/donor background
- Set a goal and a time limit
- Action planning
- Build a routine and measure success


 **SURPRISE &
DELIGHT**

- Magical moments
- Effusive emotion
- Moment of awe
- Speechless
- Moved to tears

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IMPRESSIONS 15

 **CHAT**

**What is your biggest challenge
with custom top donor
planning?**

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THE PROMISE...




FORMAT?

- Checklist?
- Spreadsheet?
- Narrative?
- Calendar?
- Form?


■

THE RIGHT
FIT

- Ensuring seamless delivery
- Under promise/over deliver
- How many is manageable?
- Who helps?
- How to implement


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“Where Stewardship Meets Cultivation”

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**RULE OF
THUMB**

98% = programmatic approach
Top 1-2% = custom engagement plan

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 **QUESTIONS**

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EIGHT AREAS OF ENGAGEMENT

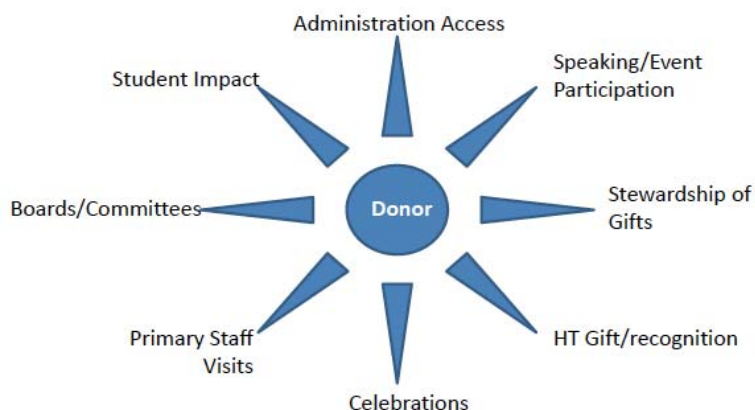


■ ENGAGEMENT PLAN POSSIBILITIES

- Campus visits
- Recipient/beneficiary interactions
- Visits, calls, emails from pertinent leadership
- Gift anniversary recognition
- Specialized impact reporting
- Photo books
- Proposal assistance
- Landmark birthday celebration
- Speaking opportunities
- Volunteer positions
- Award nominations

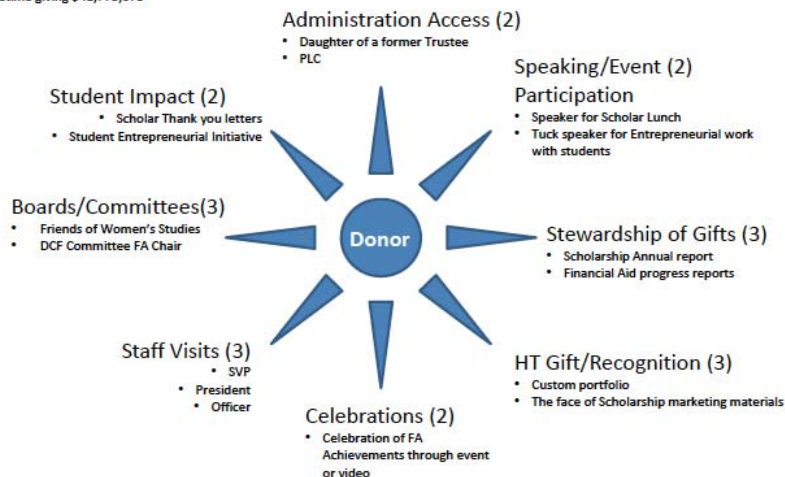
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8 Major areas of Engagement



Suggested G score: 20

Donor
Family lifetime giving \$41,775,673



Kim Griffin

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WALKTHROUGH:
SAMPLE STRATEGIC STEWARDSHIP PLAN



RESOURCE

Prospect Name: Bell Canada		Date: March 8, 2019	
Primary Volunteer:		Staff Assigned:	
Secondary Volunteer:			
Capacity Rating:			
Total Giving to PIW:		Other Giving	
Date	Amount	Date	Amount
Current Relationship/Background			
Account Strategies			
Pathways Strategy:			
Proposed Gift			
Amount			
Purpose			
Solicitor			
Solicitation Date			
Past Recognition			
•			
Potential Donor Issues		Research Questions	
•			
•			
Strategies to Address Research		Who	By When
Key Events & Dates (decision dates, proposal date, board meeting, etc.)			
Event		Deadline	



Strategic Stewardship for Major and Principal Donors

Date Plan Created: _____ Donor Relations Team: _____
UCSD Leadership/Faculty contact: _____

Donor Information		
Donor Name(s):	Areas Supported:	Notes:
ID #(s):	Main Areas of Interest:	
Birthday(s):		
Anniversary:		
Family:		

Standard Donor Engagement and Stewardship		
Reports	Event Invitations	Communications
Financial Endowment Report (fall)	Founders' Day	Chancellor Birthday Card
Scholarship Recipient Letters	Lawn Party (donor appreciation event)	Chancellor Holiday Card
Lifetime Giving Impact Report	Hearts and Scholars Dinner	@UCSD
Other: Click to enter text.	Other: Click to enter text.	UCSD E-News
		Other: Click to enter text.

Engagement Plan				
Date	Opportunity	Action	Responsible	Comments/Notes
July				
August				
September				
October				

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Engagement Opportunities			
Initiatives/Engagement Opportunities	Person	By when	Expected Results
Site Visit			Awareness raising.
Pathways 2009 Gala		Oct 2010	Sponsorship and/or table purchase
Meekison Party			Donor stewardship or prospect cultivation
Alumni Networking Reception		June 2010	Mentoring/networking event for students and corporate supporters
PW Conference		June 2010	Career building for students; volunteer opportunity and brand recognition for corporate supporters.
Cocktail Reception		May 2010	




CHAT

How are the meetings
structured at your institution?


Who is involved and what is the
process?


■ DEEP DIVE

- 3 adjectives to describe the donor
- What is their passion?
- How do they spend their free time?


 **DEEP DIVE**

- What is their pet peeve?
- Where else in the community do they support?
- Where do they travel?

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IMPRESSIONS 33

 **DEEP DIVE**

- What is their fondest memory of the organization?
- Who is their favorite person at the organization?
- Who is their least favorite person at the organization?

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IMPRESSIONS 34

DEEP DIVE

- What is the best/worst thing about the organization for them?
- What do they want their legacy to be?
- If you could do anything for this donor, no matter cost or time, what would it be and why?



RESOURCE

What To Know About Your Donor

See the previous questions listed in a convenient one-sheet document in your resource packet.

 QUESTIONS



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CREATIVE IDEAS

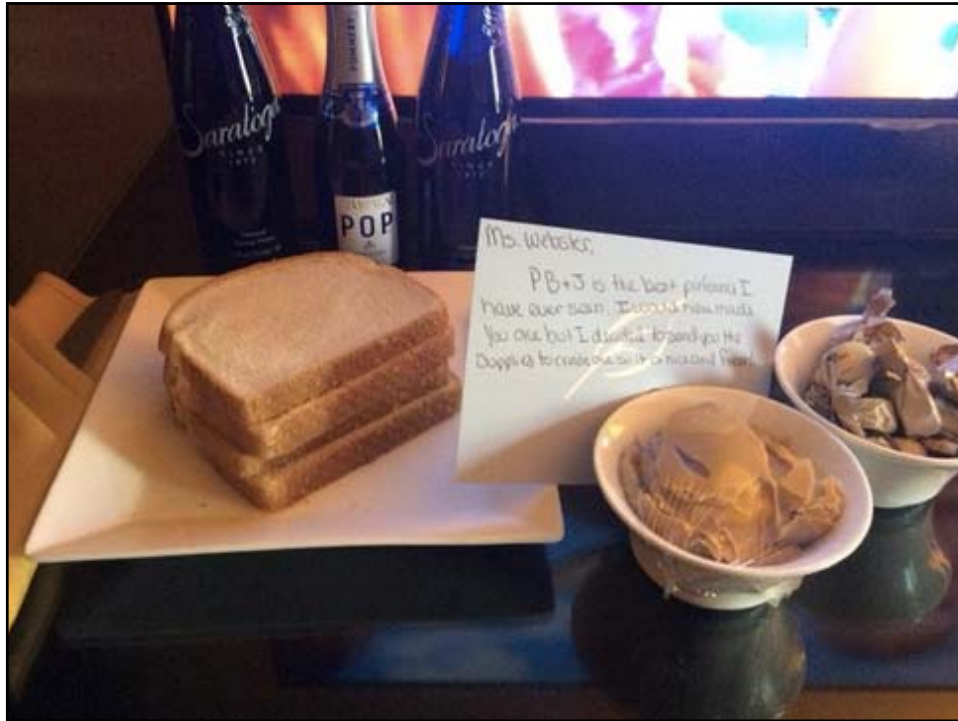


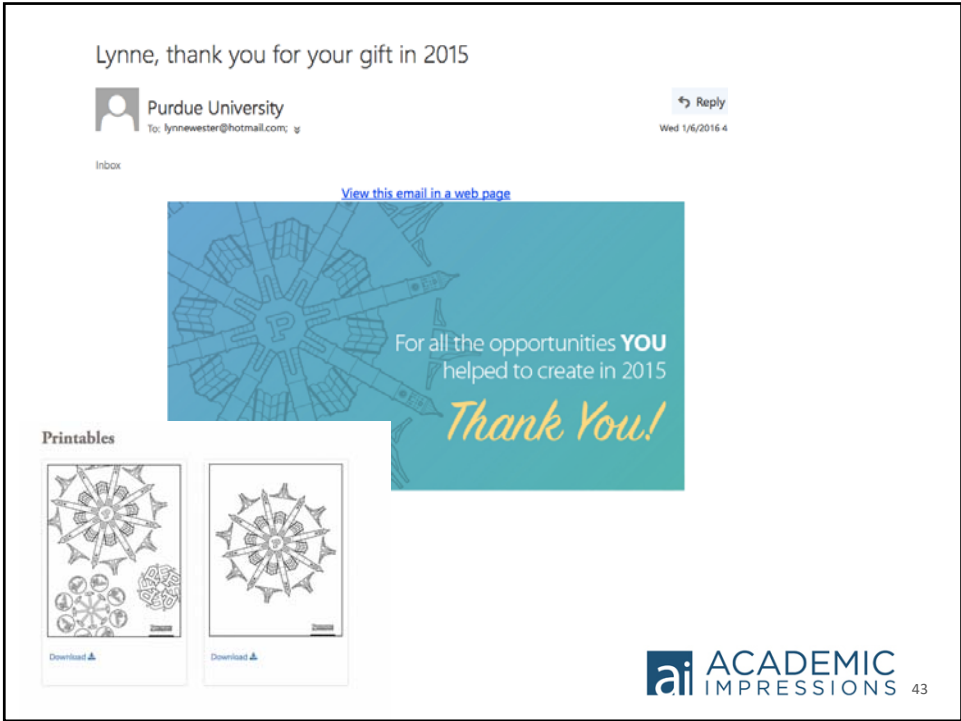


CHAT

What creative ideas have
swept your donors off of
their feet?

Strategic Stewardship for Major and Principal Donors





Strategic Stewardship for Major and Principal Donors

Hand Solo

3. The Green
Stroke Bell

4. The Flan

5. The Flan
Acorn

6. The Flan
Paradise

7. The Flan
Flanance

8. The Flan

9. The Flan
Dag

10. The Flan
Dag

6. The Flan
Stroke Bell

7. The Flan
Stroke Bell

8. The Flan
Stroke Bell

9. The Flan
Stroke Bell

10. The Flan
Stroke Bell

1. The Flan
Paradise

2. The Flan
Paradise

3. The Flan
Paradise

4. The Flan

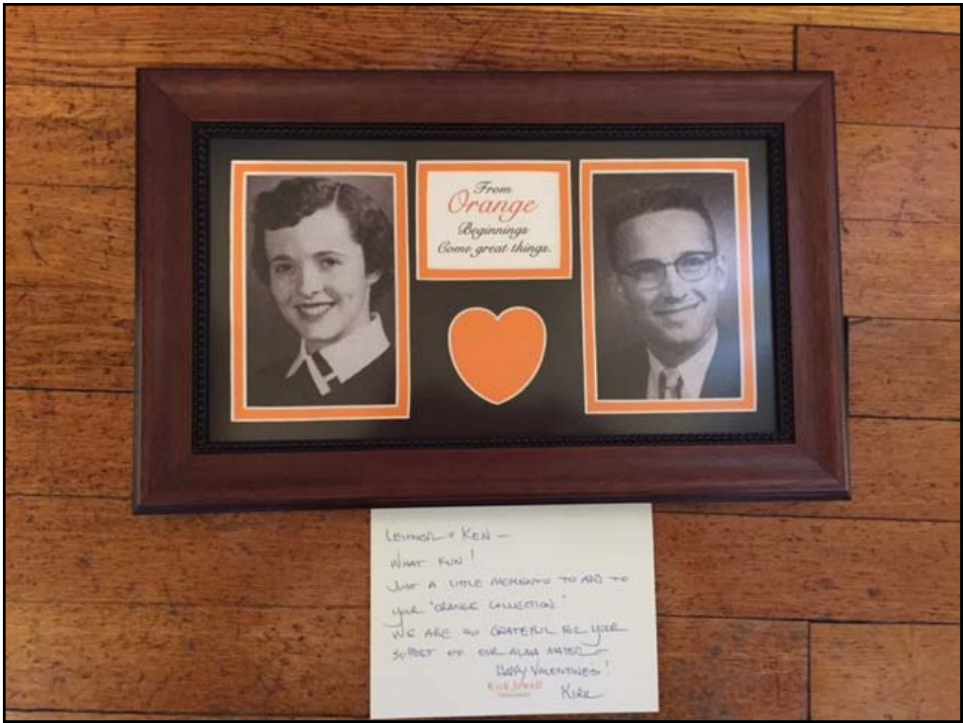
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THANK YOU
THE UNIVERSITY OF
TENNESSEE
KNOXVILLE

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The
POWER
of ONE



ADVANCING THE COWBOY NATION:
THE LANCASTER LEGACY



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A man in a suit is cutting a cake while another man in a cowboy costume looks on.



A group of four people, including a man in a suit and three women, are standing together for a photo.

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IT DOESN'T HAVE TO BE ELABORATE



...repurpose the information you already have!



I would to express my thanks for all your efforts in my behalf. After seventy-two years, you can become somewhat jaded. And my connection with the University has been estranged over the years. But your thoughtfulness was very touching and I know how much personal trouble you went through bringing the plaque.

I was a relatively poor, small town boy in college. My father died a couple of years before I went to the University. The school was larger than my hometown and finances were always a struggle, and the University could be a cold place at that time in my life.

So in my small mind, this is the first warm thing done for me by the University. It was nice of you.


I have rejoined the Alumni Association and sent token money [I will consider them also in my will], and I have also sent money to the Cimarron Review which I have always believed in.

But the bottom line of this note is: if you ever need my assistance, please don't hesitate to ask.



 QUESTIONS






 EVALUATION

Thank you!

Please remember to complete the event evaluation.
Your comments will help us continually improve the
quality of our programs.

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