

# BUILDING A STEWARDSHIP ENGINE

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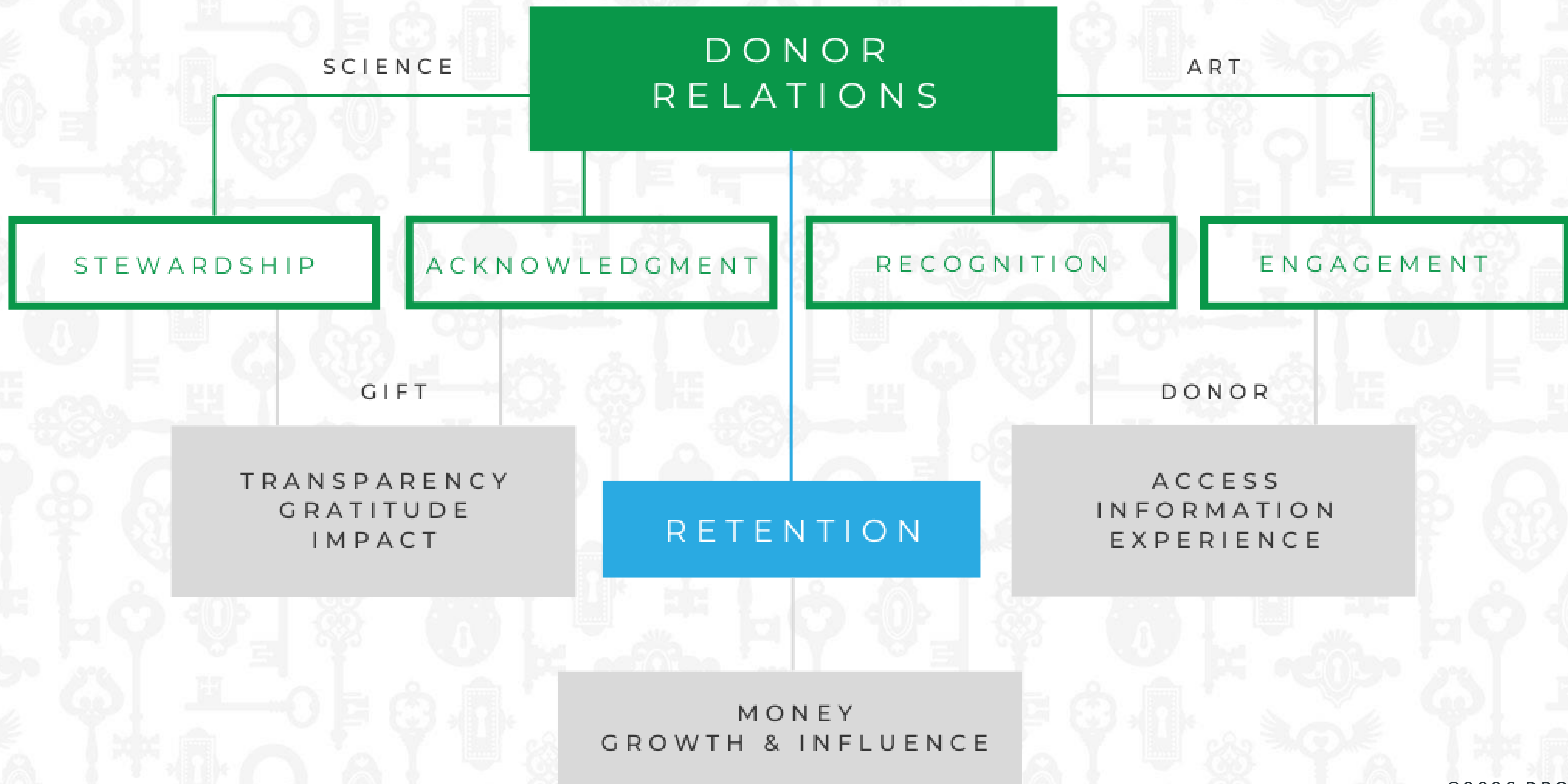
Lynne M. Wester



**DRG**  
DONOR RELATIONS GROUP



# THE 4 PILLARS OF DONOR RELATIONS



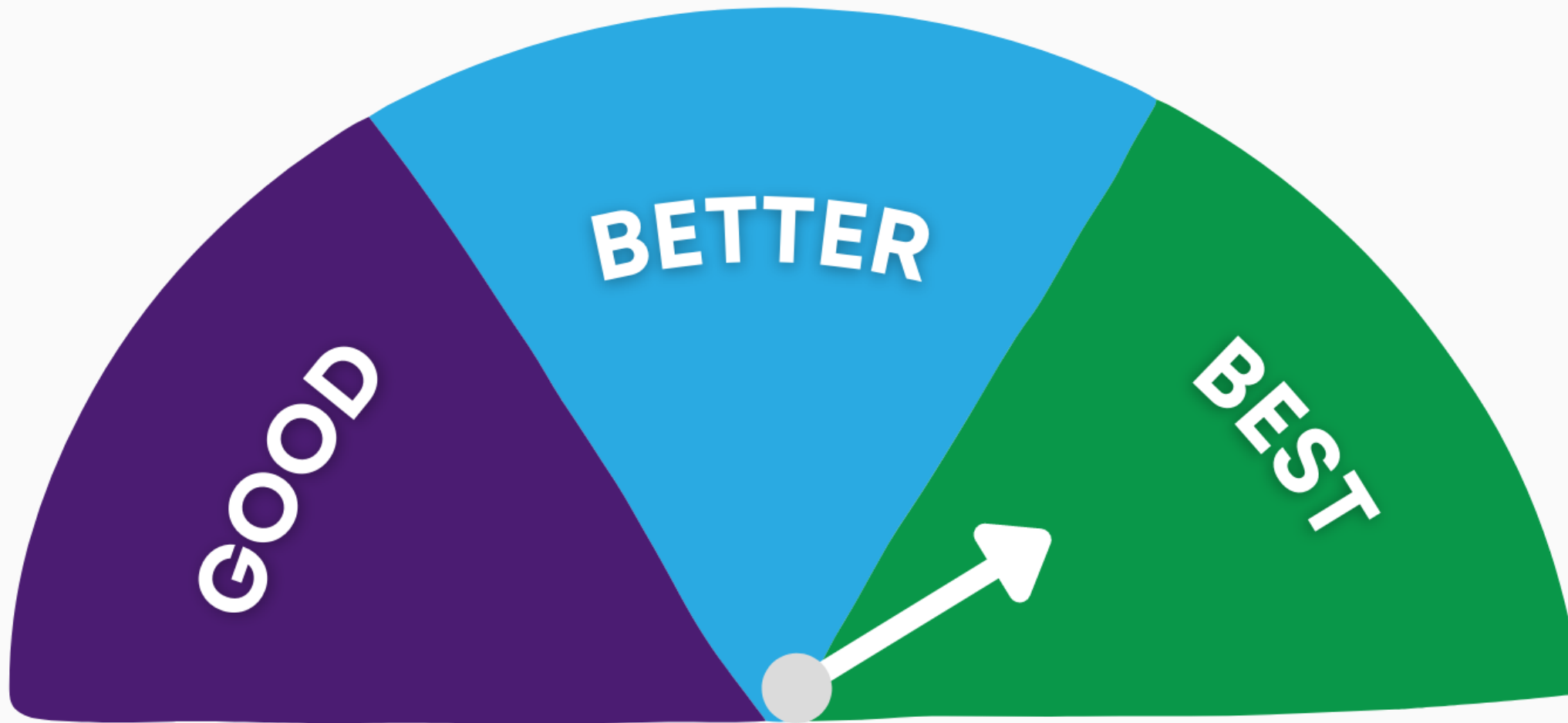
# Acknowledgment



Pillar 1

# Transparency/Gratitude/Impact

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**People gave for many reasons. 3 key ones are:**

- 1.** 85% of people said they give because they want to make a difference
- 2.** 80% of people globally give due to a personal or emotional connection with a cause
- 3.** 77% of people said they give “with their heart rather than their heads”

# Purpose of Acknowledgment

Acknowledgments have **two core purposes**:

**Thank the donor** for their gift. **Make them feel good** about giving.

The most important elements of acknowledgments are **timeliness** and **accuracy**.

Acknowledgments are about the **donor**, not the institution.

Receiving an acknowledgment should be a consistent and positive donor experience.

# Acknowledgments/ Thank You Letters

Good online “thank you”!



**Lynne, we're so happy to welcome you to the ChildFund family of friends!** You did a wonderful thing by giving a gift to help children in need, and we can't thank you enough. After all, you are the reason so many good things are possible for children in the world's poorest places.

**Your support can be a source of food when children are hungry. You help ensure medical care is available when they're sick. You provide education that helps them create a brighter future. These blessings, and many more are all possible thanks to you!**

**Thank you  
for making a  
difference!**

**Because of you, lives  
will be changed.**



Click here for a special *Thank You*.

# NOTHING good ever comes in a #10 envelope

- Jury summons
- Eviction notice
- Bills
- Rejection letter
- Junk mail
- Solicitations
- AARP offers





**Today, on World Water Day, we're raising a glass of clean water in your honor.**

To your compassion, your generosity, and the simple but powerful belief you carry: that everyone, everywhere, deserves access to clean and safe water.

We're raising a glass to you and the moment you chose to make clean water a part of your legacy, leaving a ripple effect that will extend far beyond your lifetime.

Because of choices like that, something extraordinary happens. A water point is built. A village gathers. Children drink safely. Parents worry a little less. Entire communities begin to thrive.



And while you may never see those moments firsthand, they exist because you chose to do something.

So today, Lynne, we raise a glass to you.

**Because thanks to you, someone else across the world can now raise a glass too.**

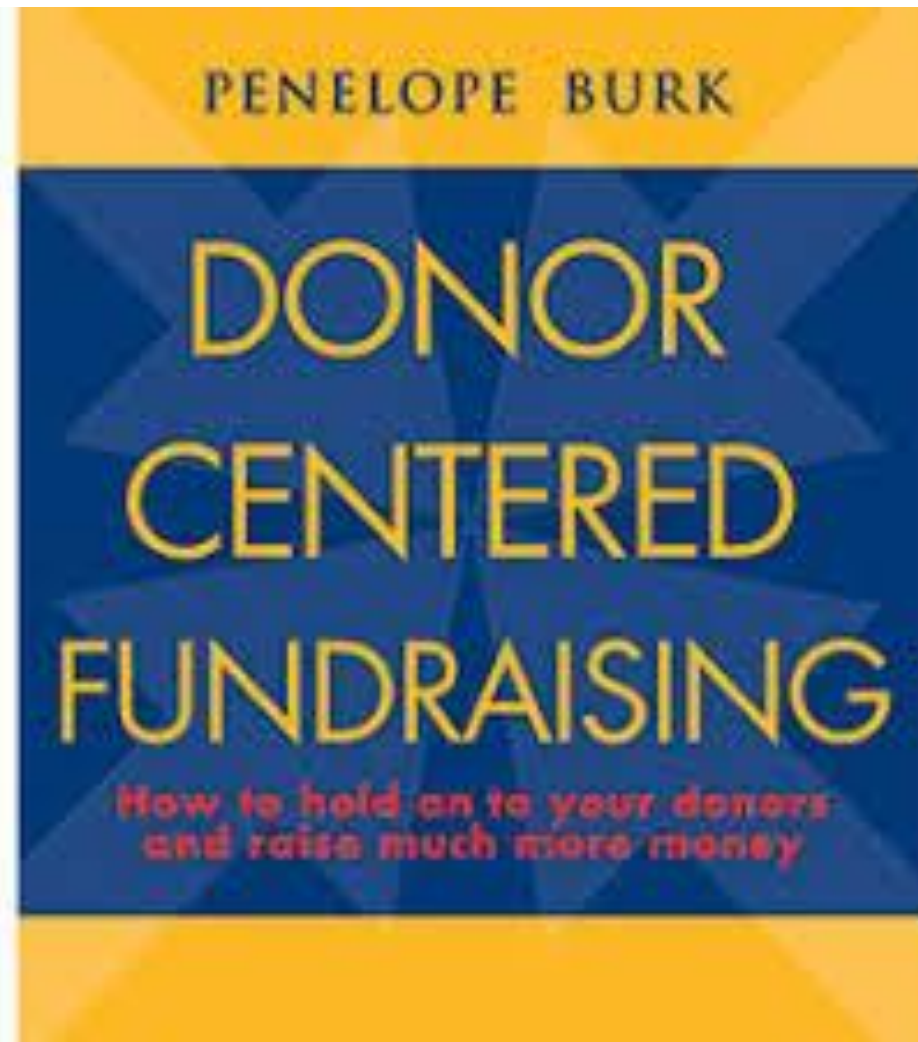
From all of us on the charity: water team, cheers!

# Stewardship



Pillar 2

# Survey Says



## Missed Opportunities

**85%**

Of donors don't receive information on gift outcomes

**84%**

Of donors would give more to charities that showed them results

**77%**

Of Millennial donors would stop donating if they don't see gift impact

# Purpose of Stewardship

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- Documentation about donor intent and expectations
- Tell the donor why their generosity is important
- Be accountable for their gifts and provide transparency
- Manage the funds created
- Report on the use of their generosity

# Setting Expectations



## ORGANIZATION

- ✓ Spend money according to donor intent
- ✓ Give gratitude to donors
- ✓ Provide accountability (reporting)
- ✓ Manage donor expectations and set healthy boundaries
- ✗ Accept money with illegal, unethical restrictions or that are contrary to their mission
- ✗ Allow donor to control money after it has been given
- ✗ Force donor/beneficiary interactions



## DONOR

- ✓ Provide gifts without illegal, unethical, or unnecessary restrictions
- ✓ Understand the relationship is with the organization, not the beneficiary
- ✓ Maintain realistic expectations of organization and donor
- ✗ Expect quid pro quo treatment or influence on organizational decisions
- ✗ Demand interaction with beneficiaries
- ✗ Feel ownership over beneficiaries



## BENEFICIARY

- ✓ Partner with organization in sharing impact
- ✓ Participate in ethical storytelling
- ✗ Expect relationship with donor
- ✗ Required to thank donor
- ✗ Participate in any unwanted interaction with donor
- ✗ Feel indebted to donor

# Broad-Based Impact Reports

## EXPLORE. ENGAGE. EXPERIENCE.

Experiential learning at UT gives students more opportunities to be involved in civic engagement, solve complex real-world problems, and contribute to the welfare of their communities as part of their regular coursework.

"I hope that future students' experiences abroad give them confidence and insight to be ready for the world, feeling empowered by having braved new frontiers and humbled in ways only a language barrier can." —Stephanie ('12) and Charlie Edwards ('12)

3

UT STUDENTS WERE NAMED 2021-22 GOLDWATER SCHOLARS  
UT is tied for first in the SEC for awardees

17

FULBRIGHT AWARDS  
Seventh among all public universities

17

SUMMER NEH FELLOWSHIPS (SINCE 2005)  
First among national universities



THE NEW HORIZONS STUDY ABROAD SCHOLARSHIP WAS ESTABLISHED FOR STUDENTS IN NEED OF FINANCIAL ASSISTANCE TO STUDY ABROAD.



“

With our partners, UT is establishing Tennessee as a go-to destination for cutting-edge research, innovation, and a skilled workforce. Together, we are committed to advancing our understanding of the world around us and developing solutions to the greatest challenges of our time.”

—Marc Gibson, Associate Vice Chancellor for Partnerships and Economic Development

2020-21 Annual Report 15

## Staff Education

Donor support provides SSM Health Cardinal Glennon caregivers access to continuous professional development so they can keep up with new information and technological advances that make a measurable impact on the lives of children.



FOLLOW THOR ON INSTAGRAM

### » FACILITY DOG SUMMIT

Last summer, 17-year-old Glennon kid, Frank, underwent a heart transplant and was having severe anxiety attacks with uncontrollable shaking due to the trauma of his diagnosis. With the help of Duo Dog Thor, Frank worked through his emotions and processed his trauma. Thor was by Frank's side for every milestone, from sitting up in a chair for 30 minutes to walking for the first time after surgery.

"Thor's presence - him lying on you, next to you, his deep breathing - is comforting," says Abbie Hedgpeth, certified child life specialist. **"We do a lot of deep breathing exercises with patients. Thor takes huge, long deep breaths. I encourage patients to mimic him when they are so worked up and anxious that it's hard to come out of it."**

Before Frank, Thor wasn't utilized with post-transplant patients because of their weakened immune systems. **Thanks to donor support, Abbie attended the 2022 Facility Dog Summit in Oklahoma, where she learned benchmarking information and best practices from other pediatric hospitals with Infection Control and Transplant teams.** As a result, Abbie and Thor performed their first post-transplant intervention with Frank just two months later. **"The difference Thor and I made in Frank's recovery was only possible because of what I learned from that conference,"** says Abbie.



SSM HEALTH CARDINAL GLENNON CHILDREN'S FOUNDATION


# We've been tracking every donation for 19 years. Now you can too.

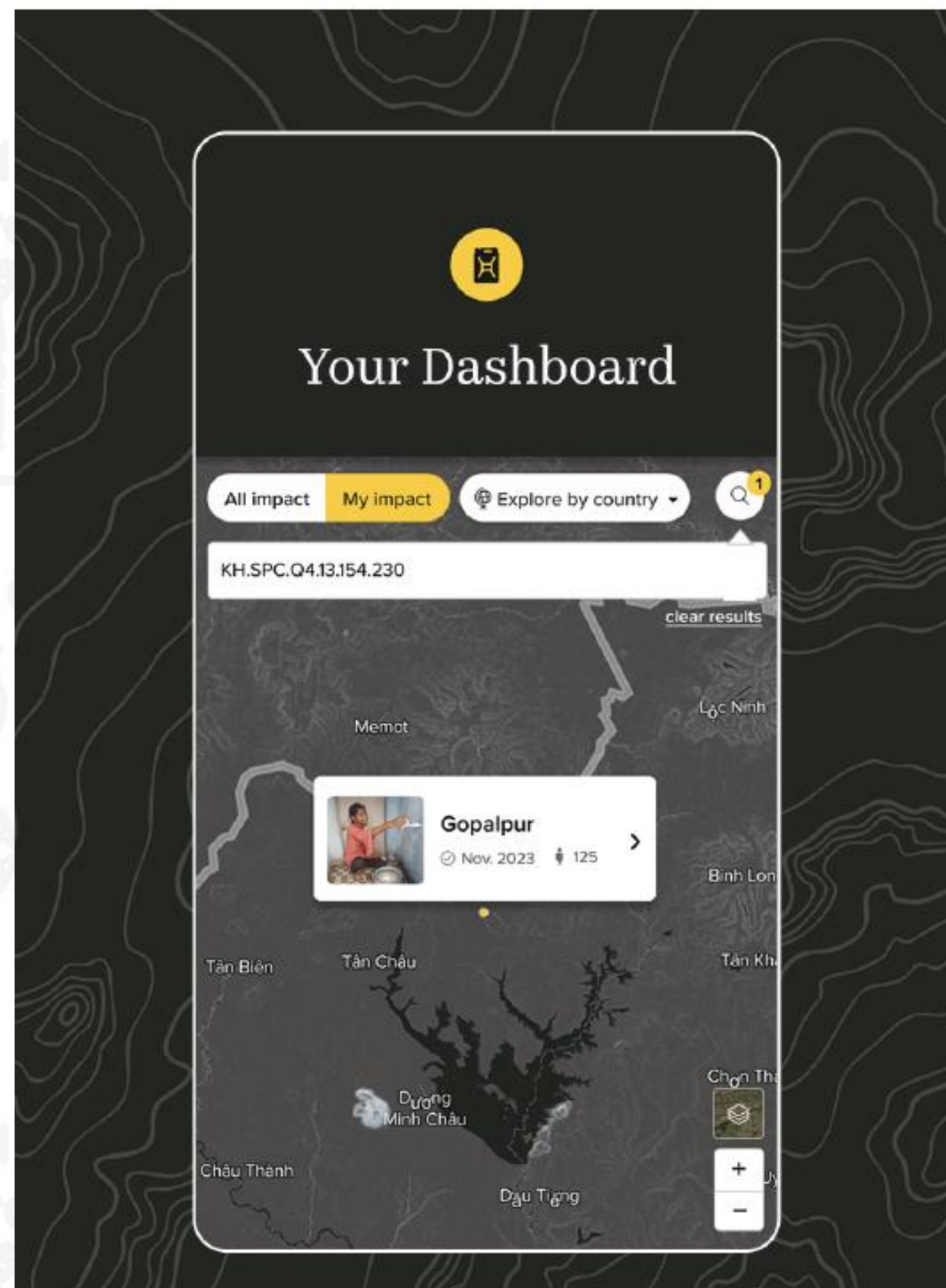
You track your deliveries, your flights, your groceries, your ride, and your run. You track just about everything in your life. So why don't you track your donations?

**WaterProof** — a first-of-its-kind donation tracking platform — allows you to do just that.



When you give to charity: water, you buy into the promise that 100% of your gift will fund clean water and that we'll prove it.

 charity: water



## PAWS-ome Surprise Update on CHEETO

Catherine Hutchins <chutchins@pawswithacause.org>

Mon 6/26/2023 1:43 PM

To:LYNNEWESTER@HOTMAIL.COM <LYNNEWESTER@HOTMAIL.COM>

Dear Lynne:

Greetings from the Great Lakes! My colleague Paula is out on a well-deserved vacation, so I have the honor of sending you a surprise update on one of your pups, CHEETO.

I believe Paula shared with you that CHEETO is following TINK in their Purposeful Placement (PurPI) path of service, and that he was going to become an Arson Detection Dog. Well, he's finished his training and is doing so well that your boy made the local paper! <https://www.sunjournal.com/2023/06/25/animal-ales-cheeto-joins-investigation-team-at-office-of-state-fire-marshal/>

According to the article, he's already helped out on six cases and his new partner couldn't be more thrilled with CHEETO's performance. It sounds like he's going to have a great career sniffing out arson cases and helping people, and that CHEETO's got a whole pack of people and other dogs to love him in his new home.

Thank you again for all of your support over the years, and for picking out some great names!

All the best,

Catherine



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



# Cheeto joins investigation team at Office of State Fire Marshal

Animal Tales: A yellow Labrador retriever, Cheeto, 2, joined the office earlier this month, teaming up with Investigator Andrew Whitney.

Posted June 25, 2023 Updated June 26, 2023  Joe Charpentier  
Sun Journal

3 min read  Font size +

 1 Comment  Gift article  Share  Print



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Investigator Andrew Whitney of the Office of State Fire Marshal works recently in Gray with his new canine partner, Cheeto. The 2-year-old yellow Labrador retriever's training is specific to sniffing out accelerants used to start or spread fires. *Maine Department of Public*

# Recognition



Pillar 3

# Purpose of Recognition

- **Recognize the donor**, either publicly or privately following their preferences and the guidelines of the organization for maximum impact.
- This recognition doesn't necessarily have to be as a member of a group but **should reinforce donor motivations** and positivity.
- Now more than ever, recognition should be **inclusive** and **representative**, not exclusive and foreboding. What once was seen as aspirational can now be seen as **accessible and goal oriented**.

# Recognition - Traditional

- Public Displays
- Giving Societies
- Events
- Wealth



Perceptions of the giving society	% "High" (6-7 of 7) All Respondents
I am aware of the giving levels that differentiate each level	9%
I understand the benefits that come with my level of giving	2%
The ability to advance in levels within the giving society impacts my giving at the university	<1%

Source: GG+A

# Recognition – Evolving

- Behavior Based
- Inclusive
- Individual

## Honoring a Lifetime of Loyalty



With seventy years of consecutive giving, Eugenia Curtis has never wavered in her devotion to the Big Orange.

In 1942, just a few months after the United States entered World War II, Eugenia Hamlett Curtis left her family's home on Main Street in rural Ardmore, Tennessee, for the University of Tennessee.

"I lived in Henson Hall," she remembers. "Shortly after we moved in, we were transferred to Mattie Cain dormitory to make way for platoons of engineers and Air Force recruits that were training at UT.



# **WOMEN & DIVERSE DONORS**

**vs**

# **TRADITIONAL DONORS**

**Give**

**Collaboratively  
and Collectively**

**Give**

**Competitively  
and Comparatively**

**First-time Donors**

Gift receipt within 2 business days of process date  
[Gift & Data Svcs]

First-time donor Hook 'Em card within 2 weeks of first gift

First-time donor welcome video within 1 month of first gift  
[from GLF via Eloqua]

Impact postcard within 3 months of first gift  
[DR "Did you Know?"]

Phone call from student within 6 months of first gift  
[AGP]

Impact email and anniversary renewal 1 month prior to 1 year anniversary of first gift  
[from GLF via Eloqua]

**All Donors \$1+ Gifts**

Gift receipt within 2 business days of process date  
[Gift & Data Svcs]

Happy New Year/Thank-you video email (January)

Valentine's Day Card (\$100K+) or email

Phone call from student within 3 months of gift  
[AGP]

Giving impact postcard from Hook 'Em within 6 months

New academic year email

Thanksgiving/holiday video or print card

**Honor and Memorial Tribute Donors**

Family/Friend Notification Letters  
[GLF Letter]

Thank you Stationary  
[DR]

**40 for Forty Donors**

Gift receipt within 2 business days of process date  
[Gift & Data Svcs]

ThankView videos appropriate to challenge and giving level

Post-campaign thank-you mailed card

Donors separate into either FTD or All-Donors track

**HornRaiser Donors**

Gift receipt within 2 business days of process date  
[Gift & Data Svcs]

Handwritten cards from student participants

Follow-up impact email

Donors separate into either FTD or All-Donors track

**Reacquired Lapsed Donors**

Gift receipt within 2 business days of process date  
[Gift & Data Svcs]

Welcome back postcard within 2 weeks of reacquired gift

Fold into All-Donors track or Longhorn Loyals

**Doubler Donors**

Double increased giving postcard (July)  
[DR "Theme?"]

Impact email with increaser stats

Thank-you phone call from student call center

Anniversary renewal email within 1 month prior to anniversary of first-level gift

Fold into All-Donors track or Longhorn Loyals

**Monthly Sustaining Donors**

Gift receipt within 2 business days of process date  
[Gift & Data Svcs]

Sustaining donor email within 2 weeks of first gift  
[Email w/ Video]

Sustaining donor packet mailed within 1 month of first gift  
[Bevo Cvr Letter]

Impact postcard within 3 months of first gift  
[DR "Did you Know?"]

Phone call from student within 6 months of first gift

Impact email 1 month prior to 1 year anniversary of first gift  
[GLF Letter]

# What's wrong with this picture?



# Engagement



Pillar 4

# Purpose of Engagement

- **Move donors through experiences** that bring them closer to their philanthropy.
- In order to build effective engagement plans, it is imperative that an organization understands its unique donor needs. Most fall into three categories:
  - **Access**
  - **Information**
  - **Experiences**
- **Engagement is for everyone**, not just the top tier of donors.

*“We are the memory makers for our donors. Remember, giving is a 90% emotional behavior and 10% logical one. Moving the donor to an emotion through an experience is ideal.”*

**LYNNE WESTER**  
**THE 4 PILLARS OF DONOR RELATIONS**

**Access**

Beneficiaries

Leadership

**Information**

Insider  
Communications

Impact

**Experiences**

Events

Volunteerism/  
Influence

INDIVIDUAL - AFFILIATED *003611-A*

NAME  
BLOOMBERG - Mr. Michael R.

MARRIED  DIVORCED  WIDOWER  SINGLE

DATE OF BIRTH \_\_\_\_\_ RELIGION \_\_\_\_\_

TITLE  
BUSINESS Salomon Bros. & Hutzler  
ADDRESS 60 Wall Street, N.Y.C. 10005  
NATURE OF BUSINESS  
Investments

HOME ~~233 E. 85th St., N.Y., N.Y. 10021~~  
ADDRESS 2 Sutton Place South  
ADDRESS New York, NY 10022

OTHER ADDRESS \_\_\_\_\_

FRIENDS OF LIBRARY  MAGAZINE  RECEPTION

JOHNS HOPKINS HISTORY AND CONTACTS

arts 60- (Feb)62, eng (Feb)62 (June)64 BES

OTHER EDUCATIONAL HISTORY AND CONTACTS

OFFICERSHIPS AND DIRECTORSHIPS

WEALTH

DATES	AMOUNT OF GIFT	U H F	Type U for gift to University H - to Hospital F - to Fund		RESTRICTIONS-TYPE COMPLETE DETAILS-USE
			SCHOOL	DEPARTMENT	
1964	5 00	U			Roll Call
1965	5 00	U			" "
1966	5 00	U			" "
1967	10 00	U			" "



**Michael R. Bloomberg**

Engineering  
Johns Hopkins University class of 1964



# Define the Donor Experience

- What we do **with** donors, not to them
- **Planned** interactions + **surprise** and **delight**
- Promote **loyalty**
- Small, **unexpected** touches
- Deliver **consistency**
- It's about **them**, not us

# The Ultimate Goal



# Thank you!

[lynne@donorrelations.com](mailto:lynne@donorrelations.com)

Donorrelations.com

