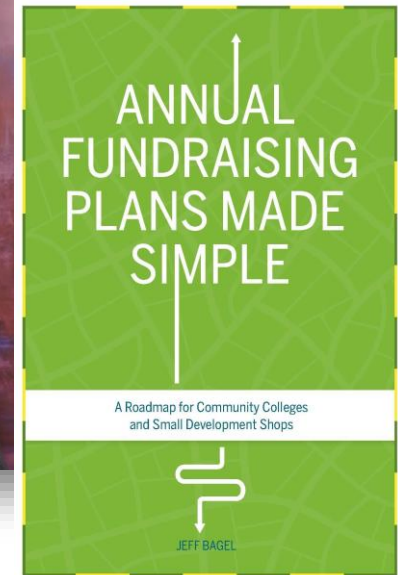


Taking Donor Stewardship to the Next Level

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1

Learning Objective

- 1) Define stewardship & understand the need for stewardship within an effective fundraising program

2

Learning Objective

2) Learn the 3 steps of how to effectively steward your donors

3

Learning Objective

- 3) Takeaway ideas of how you can steward your donors inexpensively, effectively & easily

***“Money Always Follow Vision,
Vision Never Follows Money”***



Objective 1: Define & Understand the Need for Stewardship

For Today's Session:

“Stewardship is a comprehensive effort of all staff of any non-profit that seeks philanthropic support. This group effort ensures that donors experience meaningful interactions with the organization that promote and enhance continued engagements and long-term investments”



Gratitude

+

Impact

=

Results





Who is Responsible for Stewardship?

YOU ARE





Can You Steward an Organization, Corporation or Foundation?

☐ Yes

☐ No





Can You Steward an Organization, Corporation or Foundation?

☐ Yes

☒ No





A Cautionary Tale: Pearson Family vs. University of Chicago

(Non Profit Quarterly, March 5, 2018)

The \$100 million gift, which in 2015 was the second-largest in the history of the University of Chicago, was made by twin brothers Thomas L. and Timothy R. Pearson. Two years later, the parties themselves are in conflict.

The family's foundation is suing to reclaim the \$22.9 million it has paid to date on the commitment, based on the donors' perception that the institute has hired underqualified academic and executive staff and has plans to pass along some of the donated funds to the Harris School of Public Policy out of which it is housed.

The donors also, they complain, have not been invited to 22 of the 24 events hosted by the institute to date.



A Cautionary Tale: Pearson Family vs. University of Chicago

(Non Profit Quarterly, March 5, 2018)

“As a result of having breached its obligations and having engaged in deliberate misrepresentations over a period of more than two years, the U. of C. has caused the foundation to lose all confidence that the U. of C. is an appropriate or capable **steward** of the Pearson Family legacy,” the lawsuit states.

“The Pearson’s believe their story is a **cautionary tale that should give pause to any family, philanthropist, benefactor, or donor who is considering granting a 501c3 any amount of money—large or small,**” the foundation said.



Ask Yourself: What Will Your Donors Say?

1) I know & believe in the mission. Together, we can get the mission accomplished.

☐ YES

☐ NO



Ask Yourself: What Will Your Donors Say?

1) I know & believe in the mission. Together, we can get the mission accomplished.

☒ YES

☐ NO



Ask Yourself: What Will Your Donors Say?

2) I have personal experience with your organization and the services/programs it provides and/or know someone that has

☐ YES

☐ NO



Ask Yourself: What Will Your Donors Say?

2) I have personal experience with your organization and the services/programs it provides and/or know someone that has

☒ YES

☐ NO



Ask Yourself: What Will Your Donors Say?

3) Through your frequent communication, I understand and believe in both the mission of the organization and the impact my gift makes.

☐ YES

☐ NO



Ask Yourself: What Will Your Donors Say?

3) Through your frequent communication, I understand and believe in both the mission of the organization and the impact my gift makes.

☒ YES

☐ NO



Ask Yourself: What Will Your Donors Say?

4) I know that if I have a question, concern or idea, that I can contact the organization and be heard.

☐ YES

☐ NO



Ask Yourself: What Will Your Donors Say?

4) I know that if I have a question, concern or idea, that I can contact the organization and be heard.

☒ YES

☐ NO



Ask Yourself: What Will Your Donors Say?

5) I know that my gift is being used in the manner of which it was intended.

☐ YES

☐ NO



Ask Yourself: What Will Your Donors Say?

5) I know that my gift is being used in the manner of which it was intended.

☒ YES

☐ NO



Ask Yourself: What Will Your Donors Say?

6) If I could increase my giving to just one organization this year, it will be yours.

☐ YES

☐ NO



Ask Yourself: What Will Your Donors Say?

6) If I could increase my giving to just one organization this year, it will be yours.

☒ YES

☐ NO



The Need for Stewardship Now

Keep Giving

It is much cheaper to retain a donor than it is to secure a new one

Increase Giving

Donors who give a second gift, especially in the same year as the first gift, have a retention rate that often more than doubles

References

Engaged donors refer new donors and others that can benefit from the organization's mission



Keep Giving: Current Donor Retention

The Fundraising Effectiveness Project (FEP) 2018 first quarter report indicates **year-to-date giving** through April 2018 is up **.7%** compared to the same period in 2017 but that **donor retention** is currently near its **lowest point in 5 years**, with an overall year-to-date retention of **45.5%**. This means that for every 100 donors gained in 2017 was offset by 99 lost donors through attrition.



Keep Giving: New Donor Retention

According to the FEP, new donor retention remains constant, hovering around 17.6 %

More information on the FEP can be found at:

www.afpnet.org



Increase Giving: A Recent Gallup Poll

- 81% of donors say that the organization's mission must be one they believe in
- 57% of donors want to know that their support at any level will make a difference
- 50% of donors do "some research" before giving
- 31% of donors do "a great deal of research"



Other Benefits of Good Stewardship

- Refer new donors
- Refer new stakeholders
- Refer those who can benefit from the mission
 - Students
 - Scholarship applicants
 - Volunteers
 - Special event participants

2

Learning Objectives

- 2) Learn the 3 steps of how to effectively steward your donors



Objective 2: Learn the 3 Steps on how to Effectively Steward Donors

- 1) Communicate
- 2) Involvement
- 3) Ask for Opinions/Advice



Objective 2: Learn the 3 Steps on how to Effectively Steward Donors

Communicate

- Information must be relevant
- Information must be timely, accurate & meaningful
- Information must be received by donors in the medium they want to receive
- Information should always be personalized & have your contact information



Objective 2: Learn the 3 Steps on how to Effectively Steward Donors

Volunteer

- In office
- At special events
- Directly with constituents
- Engage on boards, committees, associations & advisory counsels
- Fundraising



Objective 2: Learn the 3 Steps on how to Effectively Steward Donors

Ask What They Think

- Face-to-Face
- Phone Calls
- Emails
- Hand-Written Notes
- Surveys



Objective 3: Takeaway Ideas to Steward Donors Inexpensively, Effectively & Easily

Personalized note cards for
donors





Objective 3: Takeaway Ideas to Steward Donors Inexpensively, Effectively & Easily

Send scholarship donors
commencement photos noting
how many student-scholars
graduated






Objective 3: Takeaway Ideas to Steward Donors Inexpensively, Effectively & Easily

Tell the story of whom the program, scholarship or service is named for on applications, program books, press releases, annual reports etc...

[Opportunities](#) [Donors](#)



Mr. Clarence Byrne

Clarence Byrne is continuing his generous donation to students in the College of Business. In honor of his loving wife. We are providing her story.

Velma Ann Byrne (July 26, 1917 – October 03, 2005)

Velma Ann Byrne of Rigby, Idaho and Phoenix, Arizona died, at her Phoenix home, on October 3, 2005 from complications of cancer.

She was born July 26, 1917, the daughter of Albert and Alice (Voutour) Drolet, at South Grafton, Massachusetts. Velma attended school in Grafton and served as the Student Body Secretary her senior year, the first woman to hold an elected office in her high school. She graduated as Salutatorian of her High School class in 1935.

After graduation from high school, Velma enrolled in the Massachusetts General Hospital (MGH) School of Nursing. MGH is the oldest and largest general hospital in New England as well as the oldest and largest teaching hospital of Harvard Medical School. She graduated in 1939 with high honors and began her service as a Registered Nurse in Massachusetts.

As a result of studying and practicing at MGH she became friends with and assisted some of the finest surgeons of that time, including, Dr. Paul Dudley White whom she especially admired. Dr. White was a founder of the American Heart Association and later became President Eisenhower's personal physician after the President's first heart attack. Velma also attended graduate school at Boston University, at night, majoring in Child Psychology. She loved nursing in Boston because of the wide variety of people she met and served. She provided nursing services to some of the poorest people in Boston, especially those who were hurt by the Great Depression. At the same time, she provided nursing services to Franklin Delano Roosevelt Jr. as well as other notables such as Arthur Fiedler of the Boston Pops. While she remembered that President Roosevelt's son could be a rambunctious patient, all the nurses admired and respected Eleanor Roosevelt. Mrs. Roosevelt treated all the hospital staff, from the newest orderly to the top physicians, with the same abundance of kindness and respect.

After the United States entered World War II, Velma heard news reports that Allied soldiers were dying in the field because of lack of trained medical personnel. She therefore volunteered and became a Lieutenant in the US Army assigned to the 32nd Station Hospital Unit. Lt. Drolet served with distinction for two years in the North African campaign as well as during the invasion of Italy. Coincidentally, she often served as a surgical nurse assisting Dr. Asael Tall of Rigby, Idaho. She didn't know then that Rigby would later play a very important part in her life. In North Africa she nursed a wounded soldier from Rexburg, Idaho who had been badly injured. After the soldier, Clancy Byrne of the 776 Tank Destroyer Battalion, was released from the hospital he came back to visit the Lieutenant who had nursed him. With the permission of their respective Colonels, they began to date. Both of their Army units were also sent to Italy.



Objective 3: Takeaway Ideas to Steward Donors Inexpensively, Effectively & Easily

Invite your clients to speak at the beginning of every board, committee, or council meeting





Objective 3: Takeaway Ideas to Steward Donors Inexpensively, Effectively & Easily

Place your mission statement on the agenda of every board and committee meeting. Have a different person recite it at the start of each meeting





Objective 3: Takeaway Ideas to Steward Donors Inexpensively, Effectively & Easily

Identify alumni couples and
send framed yearbook
photos for Valentine's day
and/or other special
occasions





Objective 3: Takeaway Ideas to Steward Donors Inexpensively, Effectively & Easily

Create a first-time donor packet including:

- emotional/sincere gratitude from the organization's president
- A sticker or branding piece from the organization
- a survey to learn more donor touchpoints and a giving brochure



Objective 3: Takeaway Ideas to Steward Donors Inexpensively, Effectively & Easily

Brand pens with the organization's name & attach pen to a card that says, "you helped write our client stories. Thank you."





Objective 3: Takeaway Ideas to Steward Donors Inexpensively, Effectively & Easily

Set-up Google Alerts following any major donor or their business so you'll get notified when they get noticed





Objective 3: Takeaway Ideas to Steward Donors Inexpensively, Effectively & Easily

Share industry news from the field the donor's gift supported. Invite the donor to meet field or industry thought leaders or influencers, when appropriate





Objective 3: Takeaway Ideas to Steward Donors Inexpensively, Effectively & Easily

Send student or client-made gifts
to donors celebrating a
significant milestone:





Objective 3: Takeaway Ideas to Steward Donors Inexpensively, Effectively & Easily

Send a video message directly to donors featuring a client or student who has benefitted from the support -- showing what they are doing or able to do because of the support.





Objective 3: Takeaway Ideas to Steward Donors Inexpensively, Effectively & Easily

Take iPhone videos of what's happening in a classroom, playground, lobby or anything else named for a donor and send it to him/her.





Objective 3: Takeaway Ideas to Steward Donors Inexpensively, Effectively & Easily

Provide Tech Stickers

Thank you for
sticking with us!

#FordhamGives

We count on YOU to help share the Fordham experience with current and future Rams.

Thanks to your contributions, our students' lives have been transformed—through both education and service. **Thank you for changing the world, one student at a time.**

You can use these removable tech tags for your mobile and computing devices as a way to share your Fordham pride. We hope they remind you that Fordham is never far away.



REMOVABLE TECH STICKERS

To make a gift, please visit fordham.edu/onlinegiving.



Objective 3: Takeaway Ideas to Steward Donors Inexpensively, Effectively & Easily

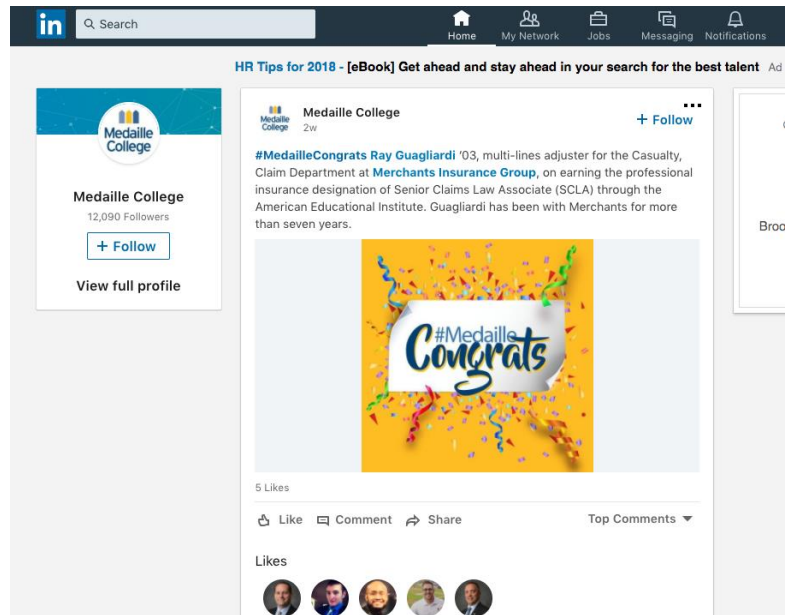
If you have SWAG, provide percentage off at the bookstore, gift shop etc... for first-time donors. |





Objective 3: Takeaway Ideas to Steward Donors Inexpensively, Effectively & Easily

Use your President's social media to post Client Success Spotlights





Objective 3: Takeaway Ideas to Steward Donors Inexpensively, Effectively & Easily

Local spotlight!

Replace non-performing fundraising events with mission-driven events that serve as an opportunity for supporters and donors to meet those who your organization helps.





Objective 3: Takeaway Ideas to Steward Donors Inexpensively, Effectively & Easily

Local spotlight!

Re-vamp normal “giveaways” to be more reflective of the personality and purpose of your organization.





Objective 3: Takeaway Ideas to Steward Donors Inexpensively, Effectively & Easily

Local spotlight!

“Heroes” instead of “donors.”





Objective 3: Takeaway Ideas to Steward Donors Inexpensively, Effectively & Easily

Local spotlight!

Take advantage of the timing – highlight donors during a specific month that connects to your cause.

Example: April is National Child Abuse Prevention Month.





THANKS!

Any questions?

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