



STEWARDSHIP & DONOR RELATIONS

OVERVIEW

Donor relations and stewardship defined: "The careful and responsible management of something entrusted to one's care." *Merriam-Webster.com, 2018.*

Stewardship and donor relations is essentially everything but the "ask." It includes gift acceptance and management, acknowledgement of gifts, donor recognition, impact reporting, and donor engagement. The CAS Advancement Services team's goal is to facilitate your efforts to thank and recognize our donors, preserve donor intent, report the impact they've made, engage them through regular communication and events, and be accountable and transparent in fulfilling our commitment to our donors.

1. Why Stewardship?

- Donors have entrusted us with their investment, and we are both grateful and accountable to them.
- Stewardship is critical to retaining donors and cultivating future giving.

2. What are the key principles of effective stewardship communication?

- Donors want timely acknowledgement of their gift.
- Donors want to know how their gift was used as they intended and that it made an impact.
- Donors at all levels enjoy personal communication.
- Alumni donors feel the strongest connection to your department and the UW brand.

3. When should I thank donors?

- Chairs, Directors, and/or department administrators should review Gift Activity Reports bi-weekly or monthly and send gift acknowledgements no less than monthly.
- Endowment lead donors and stewardees should hear from your department at least annually.
- *Contact endowment lead donors in a timely fashion if their fund's annual distribution will not be spent. Be sure to tell them how you plan to spend it next year.*



4. What are the basic characteristics of effective gift acknowledgements?

- Timely and free of errors.
- Short and concise message (1 page).
- Communicates how the gift will be used.
- Is personal — sufficiently tailored to the individual donor.
- Promotes the value of the unit by including human outcomes and impact on achieving key goals (transformational research, teaching, outreach, amazing students).
- Does not solicit another gift.
- Is signed by the Chair or Director.
- *Tip: Update your letter template several times each year to keep it fresh and timely.*

5. How can my unit use our digital/print newsletter to steward donors?

- Consider strategic story selection with stewardship as a primary goal.
- Stories should demonstrate impact and department priorities, not be just a “donor profile.”
- Consult with the MarComm team: <https://admin.artsci.washington.edu/marcomm-staff>.

6. What are other ways that we can effectively thank our donors?

- Determine how many donors you can personally thank, strategically selecting which donors to give personal attention to (e.g. board members or gifts over a certain amount).
- Send handwritten notes.
- Consider enlisting your chair, committee members, or a student to personally call donors to say thank you.
- Invite your donors to see their impact in person through personal visits or invitations to events.
- Send videos from researchers, faculty, or students.
- Frame photos that would be meaningful to the donor.
- Make use of your department’s social media channels (be aware of donor privacy preferences, and seek permission first):
 - Facebook posts that emphasize impact of private giving on students or faculty, recognize major gifts, and talk about beneficiaries.
 - Instagram photos of class projects, presentations, student recipients, endowed faculty holders.
 - Tweet thank you statements to donors on Twitter.