



DONOR STEWARDSHIP OVERVIEW

Stewardship defined: "The careful and responsible management of something entrusted to one's care." *Merriam-Webster's Online Collegiate Dictionary, 2001.*

Donor Stewardship, sometimes referred to as Donor Relations, is everything but the “ask.” It includes: thanking and recognizing, impact reporting, engagement through regular communication and events, preserving donor intent, and being accountable and transparent in fulfilling our commitment to donors.

1. Why Stewardship?

- Stewardship is the right thing to do because we are both grateful and accountable to our donors
- 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 and what was its impact
- Donors at all levels enjoy personal communication
- Alumni donors feel the strongest connection to your department and UW brand

3. When should I thank donors?

- Chairs 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 you 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/or was 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)
- Leverages how many small gifts make a difference
- Does not solicit another gift
- Is signed by the Chair or Director
- Update your letter template 1-2 times a year.

Sample thank you letters can be found at donorrelationsguru.com

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

- Strategic story selection with stewardship as a primary goal
- Stories should directly state and demonstrate impact and department priorities, not just a “donor profile”
- Consult with your MarComm specialist

6. What are other ways that we produce effective personalized Thank You to donors?

- Determine how many donors you can personally thank, strategically selecting which donors to give personal attention (e.g. board members or gifts over a certain amount)
- Enlist colleagues and students
- Handwritten notes
- Phone calls
- Social Media tags (be aware of donor privacy preferences)



STEWARDSHIP & RECOGNITION

CENTRAL

Gift Processing sends a gift receipt acknowledgment to every donor within 4-7 business days of their gift, first time donors receive a welcome packet, all other recognition outlined below.

\$\$\$	RECOGNITION*
\$500+	The President's Club Young Leaders recognition for UW graduates age 30 and younger
\$2,000+	The President's Club White recognition
\$5,000+	The President's Club Purple recognition, donors to an endowment receive CEF report
\$10,000+	The President's Club Gold recognition, donors to an endowment receive CEF report
\$100,000+**	Personalized president's letter, Benefactor recognition, donors to an endowment receive CEF report
\$1,000,000**	Laureate Recognition, donors to an endowment receive CEF report
\$10,000,000**	Presidential Laureate Recognition, donors to an endowment receive CEF report
\$100,000,000**	Regental Laureate Recognition, donors to an endowment receive CEF report

*Recognition explained on back.

** Denotes lifetime giving level

COLLEGE OF ARTS & SCIENCES

The College stewardship office works with departments and fundraisers to identify opportunities for specialized stewardship. (All donations < \$100 receive gift receipt acknowledgment from UW Foundation).

\$\$\$	RECOGNITION
\$100+	Automated thank you notecard from within 10 days of receiving gift activity report, department specific stewardship varies*
\$10,000+	Personalized acknowledgement letter from Dean, department specific stewardship varies*
\$100,000+	Personalized acknowledgement letter from Dean, identify appropriate media for coverage of gift story, department specific stewardship varies*
\$1,000,000	Personalized acknowledgement letter from Dean, identify appropriate media for coverage of gift story, department specific stewardship varies*

* Frontline Fundraisers should prompt departments to initiate personalized stewardship.

PGP, HSS and other VIP's receive personalized acknowledgement letter at all gift levels.

Over 17,000 gifts were received to the College in FY16, totaling over \$54M.

CONTACT INFO

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Stewardship Manager
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THE PRESIDENT'S CLUB YOUNG LEADERS

Giving Levels:

- Age 30 and under: \$500 and above
- Age 31-35: \$1,000 and above

Benefits:

- Same as President's Club benefits with the exception of Tyee points. For Tyee point credit, donors must give \$2,000 or more per fiscal year.

THE PRESIDENT'S CLUB

Giving Levels:

- President's Club Gold: \$10,000 and above
- President's Club Purple: \$5,000-\$9,999
- President's Club: \$2,000-\$4,999

Benefits:

- Complimentary membership and benefits in the UW Alumni Association
- Invitations to special events throughout the year, including the Annual Recognition Gala
- Annual recognition in the Report to Contributors
- Personalized TPC/UWAA membership card
- Reduced-rate permits for Seattle campus parking
- Borrowing privileges at the UW Libraries
- Access to the Waterfront Activities Center and the Golf Driving Range, including golf lessons at reduced rates
- Credit toward Tyee points for Tyee donors (the number of points accrued is contingent upon the contribution designation)

BENEFACTORS

Benefits:

- Same as above
- Recognition at the University's Annual Donor Recognition Gala
- Complimentary invitation/cost to Gala for first year achieving Benefactor level
- Listing in the UW's annual Report to Contributors
- Benefactor certificate
- Invitations to academic programs, lectures and special events
- Discount parking on the Seattle campus

LAUREATES

Giving Levels:

- Regental Laureate – \$100,000,000 and above
- Presidential Laureate – \$10,000,000 - \$99,999,999
- Laureate – \$1,000,000 - \$9,999,999

Benefits:

- Same as above
- Name listed on Donor Wall in Suzzallo Library
- Complimentary parking on the Seattle campus
- Special dinner at the UW president's residence
- Laureate gift (vase)
- Recognition at the University's Annual Donor Recognition Gala
- Complimentary invitation/cost to Gala for first year achieving Laureate level
- Listing in the UW's annual Report to Contributors



How We Support Departments?

- Onboard new department administrators and other appropriate staff
- Facilitate and educate on stewardship best practices and guidelines
- Introduce efficient tools and practices
- Liaison between UW central Advancement and CAS staff/fundraisers
- Execute college-wide weekly gift acknowledgments from Dean
- Execute college-wide stewardship to donors of Dean's Office endowments
- Execute college-wide stewardship to constituency group donors
- Draft and route major gift agreements - manage expectations, interpret legal issues, draft language, process flow, investment, distribution, prompt stewardship
- Interpret existing gift agreement language
- Draft amendments to outdated or irrelevant gift agreements
- Remind and facilitate fiscal responsibility
- Produce and distribute "New Chair Binders"
- Coordinate budget creation and pledge scheduling (divisional administrative assistants)
- Provide endowment reporting on market values, estimated annual distributions
- Facilitating synchronization of donor/stewardee name and contact information between university systems.

Additional Resources for Departments:

- Administrative Gateway
<https://admin.artsci.washington.edu/donor-relations-stewardship>
- Advance – gift reports, donor giving summaries, copies of endowment agreements

Contact Us

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Impact Reporting Examples

Good reporting is transparent and proactive. Don't wait for a donor to call.

Current Use Funds

- Routine reports on the use of the gift from the dean or chair.
- Letter from student who

Endowed Chairs or Professorships

- Letter from the dean that includes a brief bio of the chair holder/professor and description of his or her area of research.
- Dean hosts a small lunch/dinner to recognize donor and chair holder/professor.
- Letter of appreciation from chair holder/professor.
- A financial report, if appropriate.
- Arrange for donor to meet with recipients on campus.
- If multi-year appointment, encourage recipient to regularly update donor on current research.

Research, Faculty Research and Faculty Fellowships

- Letter from the dean that includes a brief bio of the researcher and description of his or her area of research.
- Letter of appreciation for faculty/researcher.
- A financial report, if appropriate.
- Arrange for donor to meet with faculty recipient on campus.
- If multi-year appointment, encourage recipient to regularly update donor on current research.

Endowment Graduate Fellowships and Undergraduate Scholarships

- Annual letter from the dean or advancement officer to announce recipients for the current academic year, includes accompanying bio of the fellowship/scholarship recipient(s).
- Invite donor to meet with fellowship/scholarship recipients during the academic year.
- Thank you letter from fellowship/scholarship recipient(s).
- A financial report, if appropriate.



Other Endowed Funds

- Routine reports on the use of the gift from the dean or department chair.
- A financial report, if appropriate.

Capitol Project Support

- Invitation to groundbreaking or dedication.
- Invitation to reception to honor donors when building is completed.
- Letter from the president re: use of building.
- Regular progress reports from dean or advancement officer, including a financial report, if appropriate.
- Commemorative photo album of building (inside and out).
- For namings, make certain the placement and size of plaque conforms to UW Policies

This is by no means an exhaustive list.

The biggest success occurs when you think from the donor's perspective and use an imaginative, personal touch based on the relationship and the gift.

January 13, 2017

Mr. and Mrs. U.W. Donor
1000 Lake View Way
Mercer Island, WA 98040-3180

Dear Mr. and Mrs. Donor,

On behalf of the College of Arts and Sciences, thank you for your recent gift to the Friends of Jewish Studies Fund in honor of Herb and Rose Fielding.

Please accept my gratitude for your strong continued support of the Jewish Studies program. Our records show that you have been one of Jewish Studies' most consistent and generous supports, going back to 2005. This is remarkable! Your commitment to creating opportunities for our students and faculty is so meaningful, and we value your many contributions that make the Stroum Center for Jewish Studies a truly outstanding program.

You are an essential part of the impact the Jewish Studies Program is having on campus. With your support, the Jewish Studies curriculum grew to enroll over 600 students in 23 courses and 9 language courses in academic year 2015-16. We were also able to offer a wide variety of programs for the campus and greater Seattle community.

Thank you again for all you do to support our campus community. I wish you both a very happy 2017!

Sincerely,

Robert C. Stacey
Dean, College of Arts and Sciences
bstacey@uw.edu

cc: Chair