

CAMPAIGN STEWARDSHIP: ZERO TO \$250 MILLION

Betsy Hughes

Vice President, Institutional Advancement

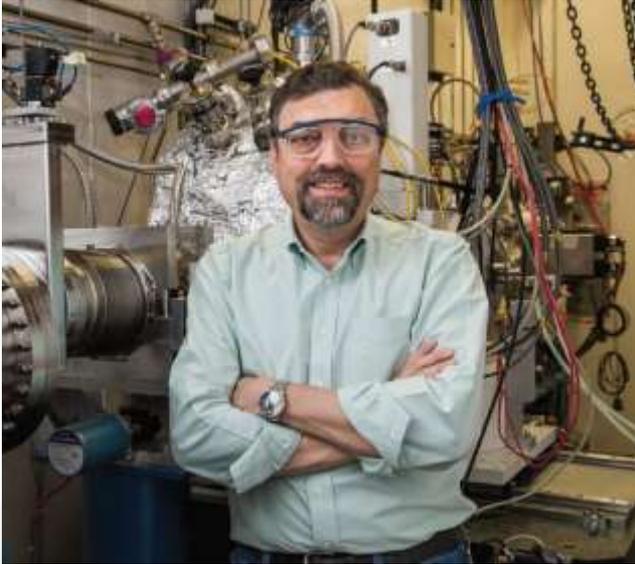
Carrie Casper

Senior Director, Campaign and Donor Engagement

Illinois Tech



Fueling Innovation: The Campaign for IIT



Stewardship @ Illinois Tech

Donor Recognition & Giving Societies
Storytelling
Events
Managing the work

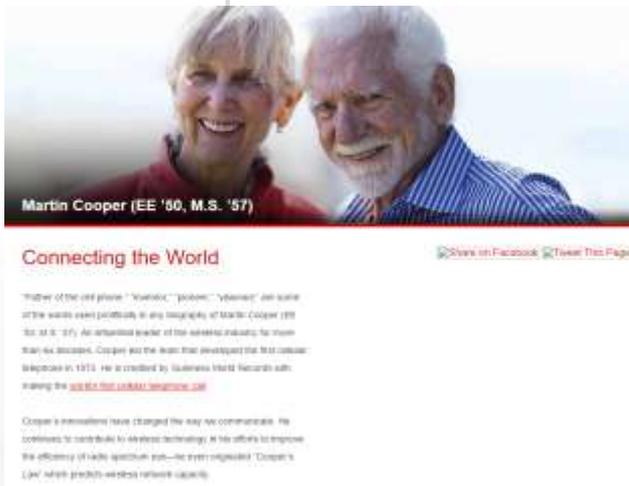
Giving Societies



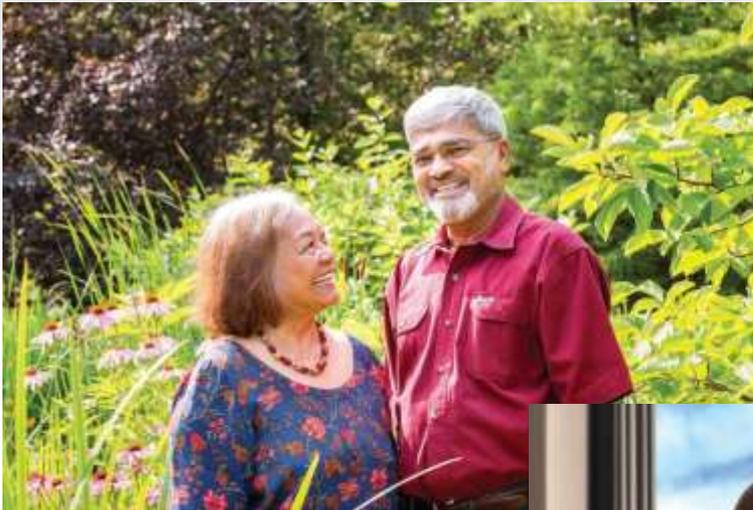
The Philip Danforth Armour Society Recognition Wall



Storytelling



- Grand Gold Award – Fundraising Videos, 2013 CASE Circle of Excellence
- Outstanding Achievement – Web Site, 2013 Interactive Media Awards
- Bronze Award – Best Web Site, 2013 CASE Pride of CASE V



SEEDS OF ENTREPRENEURSHIP

Illinois State University's Dr. Linda and Dr. John Anderson have spent the last 30 years of their lives in the heart of the entrepreneurial spirit, creating a legacy of innovation and discovery.

Dr. Anderson is the director of the Center for Entrepreneurship and Innovation at Illinois State University. He has co-authored several books and articles on entrepreneurship and innovation.

Dr. Anderson is also a frequent speaker at national and international conferences on entrepreneurship and innovation. He has been recognized for his leadership in the field of entrepreneurship and innovation.

Dr. Anderson is a member of the National Academy of Sciences and the National Academy of Engineering. He is also a member of the American Academy of Arts and Sciences.

Dr. Anderson is a member of the Board of Directors and the Board of Trustees of the Illinois Institute of Technology. He is also a member of the Board of Directors of the American Society for Entrepreneurship.

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fueling innovation
THE CAMPAIGN FOR IIT

ILLINOIS INSTITUTE OF TECHNOLOGY

DONOR HONOR ROLL 2013-2014

ILLINOIS INSTITUTE OF TECHNOLOGY

TECHNOLOGIST
 Eliaz Moshleghian (Computer Science '12)
 joined the new generation of Web Innovators

The **people** of Innovation.




Got fuel?

ILLINOIS INSTITUTE OF TECHNOLOGY

ILLINOIS INSTITUTE OF TECHNOLOGY

Impact

Academic Year 2016-2017
 Impact Report

Duchossois Leadership Professor

Eric M. Brey, Ph.D.



I am committed to the biomedical engineering community locally, domestically and internationally through leadership of high-level research, development of innovative educational programs and service to the university and professional societies. In research, my goal is to be a leader in the fields of tissue engineering and regenerative medicine through an internationally recognized research program focused on control and evaluation of vascularized tissue formation.

Current Research Focus Areas

- Engineering large volumes of vascularized tissues for tissue reconstruction due to trauma, tumor resection, pathology or congenital defect.
- Development and evaluation of new methods for assessing and monitoring engineered tissues.
- Tissue engineering systems for the study of obesity.

In addition, we are focused on providing educational opportunities in engineering and medicine that encourage careers in research, increase STEM retention and matriculation, and promote tiered mentoring in educational programs. These opportunities are available at all educational levels, including K-12 students, community college students, undergraduates, graduates, visiting faculty and K-12 teachers.

Donor & Scholar Dinner



Campaign Public Launch



**Let's
make
a little
history**



Stewardship Events



Investitures – Building a Tradition

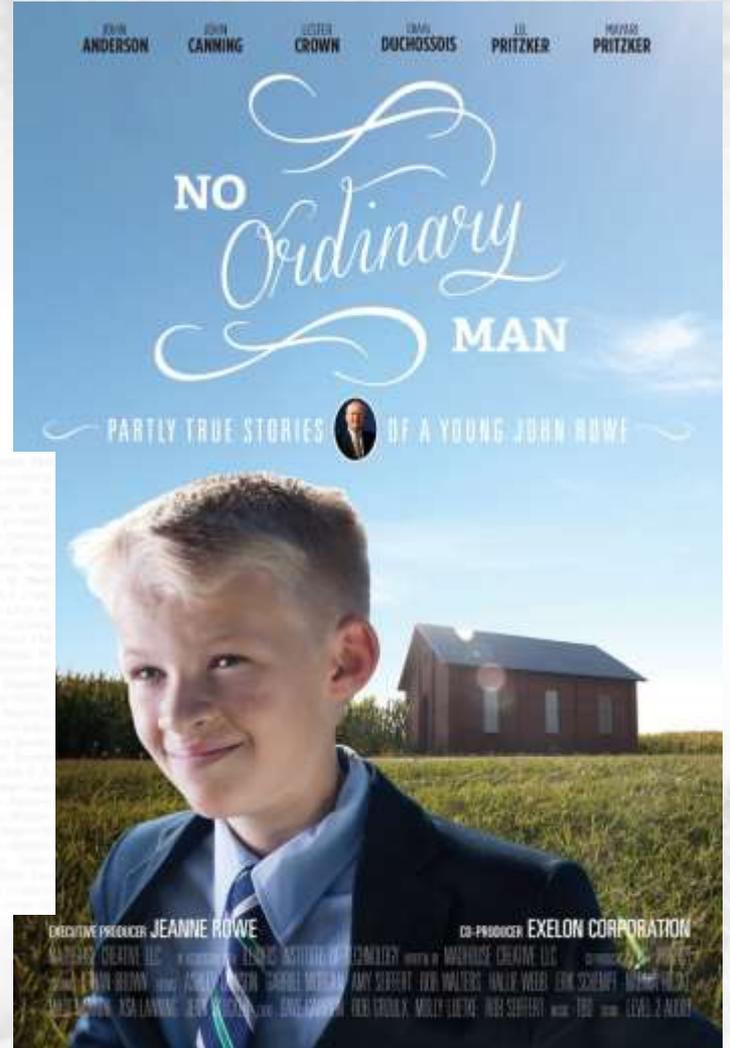


Campaign Close



Custom Donor Touches





John W. Rowe is no ordinary man. And this is no ordinary event.



EXECUTIVE PRODUCER: JEANNE ROWE
 CO-PRODUCER: EXELON CORPORATION
 MARGARY CREATIVE, LLC
 JOHN CANNING, JOHN CANNING, GUYTON CROW, ERIN DUCHOSSOIS, JILL PRITZKER, MARY PRITZKER
 JOHN CANNING, JOHN CANNING, GUYTON CROW, ERIN DUCHOSSOIS, JILL PRITZKER, MARY PRITZKER

Managing the Work

| Donor Relations Portfolio Model | | | | |
|---|--|--|---|---|
| <i>Updated 11.10.14</i> | | | | |
| Group: | MASS | BASE | BASE PLUS | CUSTOM |
| | <\$100K donors | \$100K+ donors (lifetime giving) | Base + creative but not custom touches | Base + unique, customized touches |
| Touch points: | IIT Magazine (x3) Impact Magazine, where applicable Annual giving stewardship email E-news (x6) | IIT Magazine (x3) Impact Magazine Annual giving stewardship email E-news (x6) | IIT Magazine (x3) Impact Magazine Annual giving stewardship email E-news (x6)? Pull from this pool to feature/profile in | IIT Magazine (x3) Impact Magazine Annual giving stewardship email E-news (x6)? Pull from this pool to feature/profile in |
| | Receipt | Receipt | Receipt | Receipt |
| | Impact reports, where applicable Acknowledgement letters (\$10K+) | Impact reports, where applicable Acknowledgement letters (\$10K+) | Impact reports, where applicable* Acknowledgement letters | Impact reports, where applicable* Acknowledgement letters |
| | Invite to Donor Scholar Dinner (\$10K+), | Invite to Donor Scholar Dinner (\$10K+), Invite to select special events (Heald, | Invite to Donor Scholar Dinner Invite to select special events (Heald, Invite to Armour Society event(s), where | Invite to Donor Scholar Dinner Invite to select special events (Heald, Invite to Armour Society event(s) |
| | Post event photos sent by gift officer Gift officer specific touches | Post event photos sent by gift officer Gift officer specific touches | Post event photos, where appropriate Gift officer specific touches | Post event photos/photobooks, where Gift officer specific touches |
| | Standard birthday card (managed) Holiday card (managed prospects) | Standard birthday card (managed) Holiday card (managed prospects) | Personal birthday card Holiday card (managed prospects) Birthday gift for milestone birthdays (50, End of campaign recognition TBD (invite Additional update for "area" (WISER, | Personal birthday card Personal holiday card Birthday gift End of campaign recognition TBD (invite Additional update for "area" (WISER, Request personal thank you notes or Unique campus/scholar experience - Where applicable, special event to Customized annual written donor Consider / recommend for special |
| # of touches: | 8 to 11 | 10 to 14 | 18 | 23 |
| | | QTY of donors DR can support | 50 | 15 |
| *For donors on Stewardship Special Handling list: add Endowment Financial Reports | | | | |
| **Stewardship events (i.e. space dedications or investitures) will be held for donors within appropriate timeframe, regardless of category | | | | |

Donor Relations Portfolio

Doe, John
FYXX Individual Stewardship Plan



Mr. John Doe, AB '77, MBA '79
Mrs. Jane Doe, AB '77
CID 123456 / CID 654321
Honor Roll name

Relationship manager: Suzie Smith
Natural partners: Ed Edwards, Tom Thomas
Volunteer lead: John Johnson

Context:

John Doe is a trustee and an alumnus. He sits on the Armour College Board of Advisors.
(Research report date: date or N/A)

Donor Relations / Stewardship Strategy:

To define a comprehensive recognition and ongoing stewardship plan for John and Jane Doe.
Continue to engage the Does through regular communication / activity updates from IIT, keeping stewardship fresh and vital as part of their overall cultivation towards a campaign investment.

Giving Overview:

- Lifetime Giving: \$ amount
- Gifts of Note:

| | date | amount | type | fund # | fund name |
|----------|------|--------|------|--------|-----------|
| First | | | | | |
| Latest | | | | | |
| Greatest | | | | | |

Soft Credit(s):

- Organization 1: \$ amount

Next Solicitation Date: FYXX

- Area of targeted solicitation (Expected \$ amount)

Required Stewardship Actions per Gift Agreement:

- Action #1
- Action #2

Reporting & Communications

Your Armour Society Newsletter

CONNECT | GET INVOLVED | EVENTS

GIVE NOW

ARMOUR SOCIETY
FAMAM FACTIS EXTENDIT

Armour Society Newsletter

Dear Carrie,

Thank you for your generosity and commitment to the future of Illinois Institute of Technology. Your support has helped to transform the university.

The Philip Danforth Armour Society, which recognizes families like yours who have given transformational gifts of \$1 million or more in support of the university's mission, is the core of our philanthropic community. We are proud to have added five new families since May 2015, bringing the total number to 91, several of whom have multiple donors, including our newest addition to the Finkl family, James. We are excited to begin the countdown to 100 families!

The Lo family, including Victor Lo (DSGN '73), is our newest addition to the Armour Society, and in the last year we have also welcomed:

- The Anderson family (John)
- The Anderson family (Julia, Ph.D. BIOL '75)
- The Gladwin family
- The Finkl family

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THE CAMPAIGN FOR IIT

ILLINOIS INSTITUTE OF TECHNOLOGY



Chicago, Illinois

4th Year

Studying: Business Administration

Alan and Suzanne Wendorf Endowed Scholarship

I would like to start off this letter by expressing the honor I feel for having been selected as one of the recipients of the Alan and Suzanne Wendorf Endowed Scholarship. I was very fortunate and appreciative to learn that for the third year in a row I have been granted such a gift thanks to your generosity.

Due to your thoughtful gift, I have been able to continue my education at Illinois Institute of Technology, making me the first in my family to attend college. Currently, I am a third-year business major who decided to attend Illinois Tech due to the unique technical focus that the Stuart School of Business offers. I was able to specialize not only in finance, but also in construction management, an industry that many in my family have worked in. After graduation, I hope I can work in a business role within construction and participate in projects that help develop less privileged communities. Thanks to you, I am one step closer to achieving that goal.

Your scholarship has helped to lighten my financial burden, which allows me to focus on the more important aspects of school: learning and growing. I have the time to attend Saturday professional development workshops for low income first-generation college students; I can volunteer my time to those in need; and I have been able to land an intern position for two summers in a row at PwC in their consulting department. Such accomplishments would not have been possible without your generous support. I hope one day I will be able to support the educational pursuits of socially underrepresented groups just like you have supported mine.

Thank you again for your thoughtful and generous gift.

2016-2017 Academic Year

Documentation!

Institutional Advancement Resource Teams



Annual Giving, Communications, Donor Relations, Events, and Stewardship

Welcome to the homepage for Institutional Advancement's resource teams! In the pages and links throughout, you'll find information and resources that will help you work with the following teams:

[Annual Giving](#) • [Communications](#) • [Donor Relations, Events, & Stewardship](#)

**ANNUAL
GIVING**

COMMS

**DR,
EVENTS,
STEW**

Navigation

▾ Institutional Advancement Resource Teams

- Annual Giving
- Communications
- Donor Relations & Events
- ▾ Stewardship
 - Acknowledgement Letters
 - ▾ Gift Agreement Resources
 - Gift Agreement Templates

Reporting

IA EVENT CALENDAR

| | | | | | | | | |
|----|----|----|----|----|----|----|----|----|
| 01 | 02 | 03 | 04 | 05 | 06 | 07 | 08 | 09 |
| 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 | | | | | |

DONOR RELATIONS & STEWARDSHIP CALENDAR

| | | | | | | | | |
|----|----|----|----|----|----|----|----|----|
| 01 | 02 | 03 | 04 | 05 | 06 | 07 | 08 | 09 |
| 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 | | | | | |

Naming Inventory

| Building | Room Number | Name | Plaque Text | Type | Subtype | Available |
|----------------------|-------------|--|--|------------|---------|-----------|
| Alumni Memorial Hall | 325 | Dustin & Erin Lewis Construction Management Laboratory | Dustin & Erin Lewis Construction Management Laboratory This Cool and Architectural Engineering Laboratory was made possible through the generosity of Dustin Lewis. Dedicated May 5, 2010 Additional funding was made possible through the Student Challenge and the Philanthropists Challenge. | Laboratory | | Named |
| Alumni Memorial Hall | 128 | L. A. Miller Acoustics Laboratory | L. A. Miller Acoustics Laboratory This Cool and Architectural Engineering Laboratory was made possible through the generosity of Laurel A. Miller. Dedicated November 15, 2010 Additional funding was made possible through the Amos College of Engineering and Science. | Laboratory | | Named |
| Alumni Memorial Hall | 123 | Sumanta K. Sanyal Solectrical Engineering Laboratory | Sumanta K. Sanyal Solectrical Engineering Laboratory | Laboratory | | Named |
| Alumni Memorial Hall | 305 | | | | | Available |
| Alumni Memorial Hall | 302 | | | | | Available |
| Alumni Memorial Hall | 303 | | | | | Available |
| Alumni Memorial Hall | 304 | | | | | Available |
| Alumni Memorial Hall | 311 | | | | | Available |
| Alumni Memorial Hall | 313 | | | | | Available |
| Alumni Memorial Hall | 312 | | | | | Available |
| Alumni Memorial Hall | 314 | | | | | Available |

IA Events Binder

- Calendars
- Events: Main Campus
- Miscellaneous
- Namebadges and RSVPs
- Policies, Procedures, and Guidelines
- Reporting and Feedback
- Templates and Checklists
- Venues and Vendors
- Sitemap

IA Events Binder

- [Policies, Procedures, and Guidelines](#)
- [Namebadges and RSVPs](#)
- [Templates and Checklists](#)
- [Calendars](#)
- [Reporting and Feedback](#)
- [Events: Main Campus](#)
- [Venues and Vendors](#)
- [Miscellaneous](#)

Subpages (8): [Calendars](#) [Events: Main Campus](#) [Miscellaneous](#) [Namebadges and RSVPs](#) [Policies, Procedures, and Guidelines](#) [Reporting and Feedback](#) [Templates and Checklists](#) [Venues and Vendors](#)

The stewardship team is responsible for three primary functions: acknowledgment letters, annual endowment and impact reports, and overseeing the gift agreement process. Stewardship also produces the honor roll portion of Impact Magazine, produces acknowledgement letters for \$10,000+ gifts, and provides frontline fundraisers with information and resources to help them successfully cultivate and solicit their prospects.

Below please find a list of links that will direct you to stewardship resources. For all stewardship requests, please contact the stewardship group at ia---dratewardship-group@iit.edu. Thanks!

- [Acknowledgement Letters](#)
- [Gift Agreement Resources and Templates](#)
- [Reporting](#)
- [Stewardship Special Handling List](#)

I need to know...

A how-to for everything you're looking for regarding stewardship

...the purpose of my donor's fund:

This information can be found by navigating to the fund record in RE. To access a fund in RE, search for the fund ID or full/partial fund name. The fund purpose will be included in the notes section on the general tab of the fund.

...the status of an in process / draft gift agreement:

Each gift agreement goes through a series of review and approvals. Please refer to the [gift agreement tracking sheet](#) on the Stewardship website for a status of your donor's gift agreement. Completed gift agreements may be found in the media tab of Raiser's Edge.

...where I can find my donor's completed gift agreement:

Once each gift agreement is completed, a PDF of the signed agreement is unloaded to the

Building Community



\$250,242,380

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THE CAMPAIGN FOR IIT



ILLINOIS INSTITUTE OF TECHNOLOGY



Betsy Hughes
hughes@iit.edu

Carrie Casper
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