DONOR NAME

Customized Donor Relations and Stewardship Plan - Checklist

Date of Plan:	ID#	
Stewardship Manager:	Prospect Man	ager:
Degree(s) and graduation year(s):		
CR stewardship strategy (if available):		
Most recent pledge payment (mm/dd/year):		
Total giving:		
Next Solicitation Date:		-
NEW Gift Specific Actions:		
Thanking: • Vice-President (all gifts of more than \$25,000 • President (all gifts of more than \$100,000))	
□ Letter/Phone Call – Dean □ Letter/Phone Call – C □ Letter/Phone Call – Volunteer □ Letter/Phone Call – C		☐ Letter/Phone Call – Funding Recipient☐ Letter/Phone Call - Other
Details and Staff Assignments:		
Gift Recognition Communications (C&PA/DRS) Media Release News Story for Campaign Website Newspaper Advertisement (Globe & Mail or other) Email Headline Summary/Media Scan News Story for Impact Western News Story for Faculty Website/Newsletter Other Communication		
Lead Gift Naming Opportunities and Signage ☐ Recognition Sign for Building or Building Component ☐ Listing on Office of the Registrar or Graduate Studies website for student award(s) ☐ Academic position(s) cited by holder of position on faculty member's website		
Details:		
Initial Lead Gift Specific Stewardship Events/Visits ☐ Public Gift Announcement (Discuss preferences and t ☐ Tour (Campus or Building) ☐ Stewardship Personal Visit or Call with funding recipied Details:	The state of the s	

Ongoing Stewardship and Donor Relations Actions:				
Benefits of 1878 Donor Recognition:				
Events: Members of the 1878 Societies will be invited to at least two 1878 Societies events annually. Examples may include: • President's Holiday Reception annual invitation (if living in Toronto-Windsor corridor) □ Meet and Greet event at a DW Faculty of Music concert in the Paul Davenport Theatre (Parsons/Poole) □ Private lunch/dinner with Western's President, Chancellor or Dean (May include appropriate senior staff such as the Dean, researchers, etc.).				
Donor Appreciation Tokens: If not yet delivered, can a call be booked to deliver? □ 1878 Society Pin/Cert □ LFT Pin □ Photo Album □ Video Recognition □ Other/comments: Additional Ongoing Stewardship Events • Invitations to Alumni Events (provided through AR if donor is an alumnus) □ Tour (Campus or Building) □ Stewardship Personal Visit or Call with funding recipient □ Other (e.g. loyalty event, milestone event (graduation anniversary/building anniversary), invitation to speak)				
Details:				
Annual Communications (C&PA) Impact Western (March, July, November) Sent to all members of The 1878 Societies Western Alumni Gazette (three times annually) Sent to all members of The 1878 Societies Western Alumni News (monthly) Sent to all alumni for whom we have email addresses Annual Impact (September) Faculty/Department Newsletters and Magazines (various) Sent to alumni via Faculty and Communications Holiday Card (Jewish/Chinese)				

Stewardship Reporting (DRS/DFM)		
□ Stewardship Impact Communications from DRS: M ○ Begin Date:		
Details:		
-		
□ Endowed Financial Report (To be mailed) via DFM ○ Begin Date:	End Date:	
□ Student Thank You Letter (August) via DFM ○ Begin Date:	End Date:	
☐ Giving History Report: Prepared by DRS or D	PFM	
Donor Interests:		

Comments:



Recognition plan for Mr. John Smith and the Smith Foundation Western University

This draft document provides a detailed recognition plan related to a generous donation of \$2 million from The Smith Foundation to the University. This \$2 million donation will be matched by the University for a total of \$4 million in endowed funds to establish The John Smith Chair in Imaging Research.

In appreciation of the generosity of the Foundation, the University will be pleased to offer the following recognition:

1. Communications

- Communications and Public Affairs will issue a media release announcing the gift to key media outlets. The Smith Foundation will approve the release and will advise if Mr. Smith will be available to speak to the media or will authorize a designate to speak on his behalf.
- Announcement of the gift will be published on Western University's homepage, social media accounts and Western's fundraising campaign homepage.
- A story will be written and published in the University's newspaper, Western News (print and online), including a picture of Mr. Smith. (The Foundation will advise Western of a convenient time to conduct an interview with Mr. Smith).
- Announcement will be included in an issue of the Western Alumni News e-newsletter and Western Alumni Gazette magazine (print and online).
- Announcement of the gift will be included in the donor magazine, Impact Western.
- The University will share the story with The Gazette, Western's student newspaper for consideration.
- Announcement of the gift in an advertisement placed in the London Free Press and in a national edition of the Globe & Mail. (Subject to approval from The Smith Foundation).

2. Events

- Mr. Smith, The Smith Foundation, Faculty & Staff and selected guests will be invited to a recognition event and media announcement taking place at Western University in London ON.
- Once the Chair is appointed, the Dean of the Faculty of Schulich School of Medicine & Dentistry will facilitate a meeting, including campus tour while in London ON. or video conference to introduce him or her to Mr. Smith and representatives of The Smith Foundation.

3. Donor Recognition

- ➤ The 1878 Societies "The Smith Foundation" will be recognized in the University's 1878 Societies. Named to reflect the year of the University's founding, the 1878 Societies represent the most generous individual donors with cumulative giving of \$25,000 or more and corporate and foundation donors with cumulative giving of \$100,000 or more to the University. Members receive benefits including listing on a donor wall in Alumni Hall, newsletters updating the donor on University affairs, and invitations to donor events.
- ➤ 1878 Societies Donor Listings The University will publish an annual listing of 1878 Societies donors in Alumni Hall and the magazine Impact Western with a picture and quote from the The Smith Foundation.

Donor Recognition

Be Extraordinary.
The Campaign for Western

Joyce Garnett

Thank you for your generous gift to support Western Libraries.

Since you made your donation, Western University has been pleased to recognize your generous bequest to Western Libraries. The following is a summary of that recognition.

Articles and Promotion

Western News (print article and website) and Giving to Western (website) and Western Alumni News (electronic newsletter) and Impact Western (January 2017)

Gift builds 'bridge' to the future

Joyce Garnett believes change is good. Now, thanks to a \$1-million legacy gift to establish the Joyce C. Garnett Innovation Fund, the University Librarian Emeritus will inspire future development and growth in Western Libraries.

Western Alumni Gazette (print article and website)
Winter 2017

Campaign gifts support students, research and innovation

A handful of high-profile campaign gifts this fall offered support to students, research and innovation.

Western Libraries (September newsletter) Leaving a Legacy for Innovation

Joyce Garnett's generosity will leave a legacy devoted to innovation in library spaces, practices, and technology.

Western Libraries Website

Your gift was also featured for several months on the "Explore the Libraries" website within the Western Libraries page.

The 1878 Societies

Your gift was featured on The 1878 Societies donor wall in Alumni Hall, in Impact Western and online (see image below).

Note: Everything bold/italics is a link to an article.

"I believe that libraries inspire learning and discovery, create academic community and transform lives. I am proud to support Western Libraries."

- Joyce C. Garnett, of the gift in her Will to support Western Libraries Helen M.B. Allison Legacies Society



Thank you so much for your extraordinary gift to support Western University.

Veronica Stoiber Director, Stewardship and Donor Relations Western University, London ON N6A 3K7 t. 519.661.2111 ext. 84216 e. vstoiber@uwo.ca www.westernu.ca



Customized Donor Relations Plan

Mr Donor Name

Start Year: 2015-2016

Last Update: 2016/2/16

Review Year: 2016-2017

ID#: 0000XXXXX

Degrees: B.A.(3Yr.) Sociology - 1982

Birthdate: 3-Sep-1959

Spouse Name and ID#:

No spouse record in CR or spouse is deceased

Recognition Name: XXX Foundation

1878 Society: A. Peache Society (Donors of \$250,000-\$499,999)

Planned Giving Name:

Prospect Manager: Cole, Kelly

Stewardship Manager: Rhuman, Susan

Secondary Prospect Manager: Stinson, Carole

Lead Gift Level: 100K to 499K Lead Gift Faculty: Cross Faculty

Lead Gift, Donor Interests and Strategy Description

Lead Gift: \$400,000 to Student Experience outlined in Stewardship strategy paid in annual installments of \$200,000. Gift booked Oct 2015 and is to be spent in 15-16 and 16-17. Donor interests and solicitation strategy. Kelly Cole plans to ask for an additional \$600,000 in 2016 to create a full \$1M gift; Comments: None

Most recent gift or pledge payment: 04/26/2016; \$50,000; the Donor Name International Learning Bursary.

Strategy-Specific Actions

Stewardship/Recognition Events/Visits

Stewardship Event

Status: Scheduled

Planned: 2016/09/01

Complete:

Responsible: Mrs. Veronica Stoiber

DRS to work with Student Experience to plan an opening event in fall 2016 for the Western Wellness Education Centre to announce gift and naming opportunity.

Gift Recognition Communications (C&P A/DRS)

Stewardship Communications

Status: Complete

Planned: 2016/02/16

Complete: 2016/02/16

Responsible: Mrs. Susan Rhuman

Provided summary of promotion for the ...including news, video and photo links with PDF of event poster. Kelly to send by email and hard copy also provided for call Feb 19.

Naming Opportunities and Signage

Stewardship N/O - Donor Name Room

Status: Scheduled

Planned: 2015/11/12

Complete:

Responsible: Mrs. Susan Rhuman

Cross Faculty, Building or Building Component, May name the ... in the University Community Centre.

Stewardship N/O - Donor Name International Learning Bursary

Status: Complete

Planned: 2015/11/12

Complete: 2016/04/26

Responsible: Mrs. Susan Rhuman

Cross Faculty, Student Award, Financial Need, Expendable, UWO, 15-16 to 16-17.

Stewardship N/O - Donor Name Lecture Series

Status: Complete

Planned: 2015/11/12

Complete: 2015/11/12

Responsible: Mrs. Susan Rhuman

Cross Faculty, Other Naming Opportunities, Lecture, Expendable, UWO, 15-16 and 16-17.

Thanking

Standard thanking provided

Recognition and Involvement

Benefits of 1878

Level: A. Peache Society (Donors of \$250,000-\$499,999)

Standard benefits of 1878 membership include a donor listing on the boards in Alumni Hall and invitations to at least two 1878 Societies events annually. Events discussed with the prospect manager will be scheduled as needed.

Donor Appreciation Tokens

Item: 1878 Society Pin

Date Given: 2015/10/02

Given By: Kelly Cole

Comments: Kelly to deliver on call.

Involvement and Other Recognition

No involvements on record

Stewardship Reporting

Stewardship

Start Year: 2015-2016

Review Year: 2016-2017

Stewardship reporting requirements of the Donor's gifts are part of the Stewardship Strategy and appear here...

Faculty: Cross Faculty Financial Report Month: Impact Report Month: April Award Report Month: April

Recent Linked Stewardship Actions

Stewardship

Status: Scheduled

Prepare 15-16 report on recipients of the Donor Name International Learning Bursary and confirm value increase for 16-17 from \$30,000 to \$50,000.

Planned: 2016/04/27

Complete:

Responsible: Mrs. Susan Rhuman

Stewardship Report - Health and Wellness 15-16

Status: Complete

Provided impact report for support of health and wellness activities in 15-16. Kelly Cole to deliver on call April 19. Planned: 2016/04/15

Complete: 2016/04/15

Responsible: Mrs. Susan Rhuman