

DONOR NAME

Customized Donor Relations and Stewardship Plan – Checklist

Date of Plan:

ID#

Stewardship Manager:

Prospect Manager:

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 – Chair

Letter/Phone Call – Funding Recipient

Letter/Phone Call – Volunteer

Letter/Phone Call – Chancellor

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 timing with donor)

Tour (Campus or Building)

Stewardship Personal Visit or Call with funding recipient

Details: _____

Ongoing Stewardship and Donor Relations Actions:

Benefits of 1878**Donor Recognition:**

- 1878 Societies Recognition Level:
- 1878 Boards in Alumni Hall
- Donor listing on the Campaign Website and Impact Western

 Anonymous Other Service Indicators: _____**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.). Other event? _____

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)
- Birthday Card (year/month/day): _____

Stewardship Reporting (DRS/DFM)

Stewardship Impact Communications from DRS: Method of delivery? Mail or Call or Email

○ Begin Date: _____ End 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 DFM

Donor Interests:

Comments:

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.

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Western 

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

