

2026 ADRP Northeast - Mid-Atlantic Regional Conference

May 15 | SUNY Global Center
New York, New York



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Streamlining Stewardship:

A Data-Driven Approach to "Disengaged" Donors

Sara C. Emmenecker

Associate Director, Stewardship Reporting
Brown University

The Path to Streamlined Stewardship

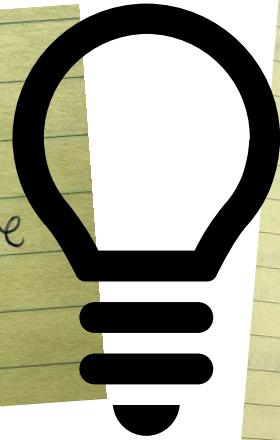
- **The Challenge:** Confronting Reality
- **The Data:** Defining the Metrics
- **The Buy-In:** Reallocation over Reduction
- **The Strategy:** Executing a phased "opt-in" campaign
- **The Results:** Streamlining rosters to reinvest in higher-ROI stewardship



Origin Story



Origin Story



only 14% of people accessing reports -
where is the drop off? 2-step
authentication? How to increase
access rates?

Streamlining Reporting Efforts

10/6/23

Sara Moise, Tulane
Rob, Mythos

- Digital Reports have open metrics → help measure ROI
- Mythos applies guardrails to content, i.e. character limits
- Mythos direct mail tools to help drive stewardees to access digital reports
- Mythos emails give insights to engagement to help improve access

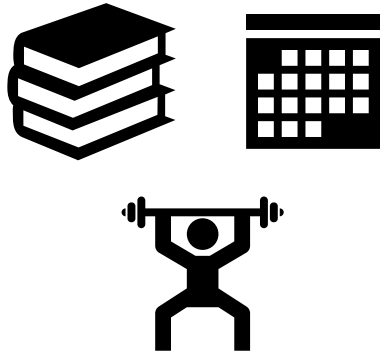
^{urgency}
- Email to donors who haven't engaged in digital reports for several years and allow them to opt in to continue to receive reports, otherwise stop

in printed report to invite donors to engage digitally
- Email to donors who haven't engaged in digital reports for several years and allow them to opt in to continue to receive reports, otherwise stop

Stewardship Reporting at Brown in FY23

-  **2,126** custom reports
-  **2,247** funds
-  **1,251** impact stories
-  **2,789** stewardees (**2,012** households, **114** orgs)
-  **1,613** electronic  **496** mail  **17** electronic/mail
-  **4** Stewardship Reporting FTE
-  **12** months content collection and report production

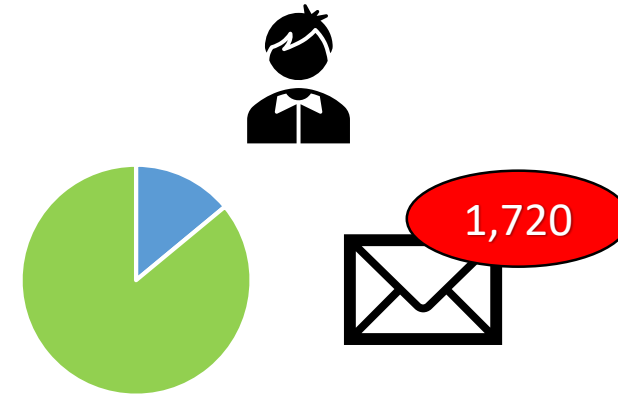
The Challenge: Confronting Reality



12 Months of Production

2,000+ Custom Reports

“More Volume = Better Stewardship”



13% Digital Report Access

Bloated Rosters

Grandfathered Stewardees



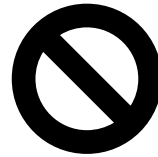
*In spite of our best efforts, many of our stewardees
will never engage with their reports.*

(And that's okay.)

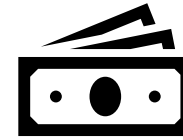
The Data: Defining the Metrics



Household received
electronic reports for
3+ years



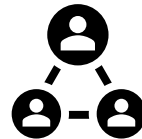
Zero household
report access for 3+
years



No gifts or
commitments in 3+
fiscal years



Not managed
prospects



No concerns with
familial relationship
with managed
prospects



No concerns based
on review of funds on
which they are
stewardees

The Buy-In: Reallocation over Reduction





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The Strategy: Phase I

Phase I

346 stewardees: email notification, postcard, final reminder email

If you would like to continue receiving personalized, digital annual stewardship reports, please respond.

 BROWN

Office of Donor Relations

Dear Nicholas,

Brown's Office of Donor Relations enjoys sharing stories about the impact of philanthropy on campus and beyond, like those found in your annual stewardship report. Each fall, you receive an email notification when your annual stewardship report is available to download from the secure myBrown portal. Your stewardship report includes narrative and financial information on the funds that you, your family, or others established at Brown. But we also realize that there may come a time when you no longer wish to receive these updates.

If you would like to continue receiving personalized, digital annual stewardship reports, please let us know by [clicking the button below](#), or responding to this email.

[Continue receiving digital reports](#)

We want to ensure we are contacting you at the correct email address; if we don't hear from you by September 16, 2024, we will discontinue sending your digital annual impact reports.

Thank you for connecting with us and for your support!

Brown University Office of Donor Relations




Brown's Office of Donor Relations enjoys sharing stories about the impact of philanthropy on campus and beyond, like those found in your annual stewardship report. Each fall, you receive an email notification when your annual stewardship report is available to download from the secure myBrown portal. But we also realize that there may come a time when you no longer wish to receive these updates.

If you would like to continue receiving personalized, digital annual stewardship reports, please respond by visiting go.brown.edu/StwdReport or emailing us at donorrelations@brown.edu. If you have already responded after receiving our email message, thank you!

We want to ensure we are contacting you at the correct email address; if we don't hear from you by September 16, 2024, we will discontinue sending you digital annual impact reports. Thank you for connecting with us and for your support!



Last chance to continue receiving personalized, digital annual stewardship reports

 BROWN

Office of Donor Relations

Dear Donor,

If you would like to continue receiving personalized, digital annual stewardship reports, please [submit this quick form](#), or reply to this email.

[Continue receiving digital reports](#)

Brown's Office of Donor Relations enjoys sharing stories about the impact of philanthropy on campus and beyond, like those found in your annual stewardship report. But we also realize that there may come a time when you no longer wish to receive these updates.

We want to ensure we are contacting you at the correct email address; if we don't hear from you by September 16, 2024, we will discontinue sending you digital annual stewardship reports.

Thank you for your support!

Brown University Office of Donor Relations



Phase I Results

346

Stewarddees
Targeted

52

Stewarddee
Responses



52

Stewarddees
Kept Active

281

Stewarddees
+ **27** Spouses
End Dated

125

Funds Made
Non Reportable

The Long Tail: Monitoring Hand-Raisers

- **Nov 24:** 52 Reports sent → Only 9 accessed
- **Jan 8:** Personal outreach → 7 more accessed + 3 switched to mail
- **March 25:** 11 more funds converted to "Financials Only"

sara_emmenecker@brown.edu

Wed, Jan 8, 1:49 PM ☆ ↶

Hello and Happy New Year, Sara!

Last year, you indicated that you were interested in continuing to receive annual stewardship reports. Your custom 2023-24 Stewardship Report was shared with you via email on November 25, and a reminder message was sent on December 5.

I'm reaching out to ask if you have any questions or need help accessing your report. It is available now via the [secure myBrown portal](#). Your lifetime giving history and tax receipts are also available on myBrown.

Your report includes a detailed, custom summary of the impact of your family's support, plus updated financials. If you no longer wish to receive stewardship reports, please let me know and I will update your preferences.

With thanks,
Sara Emmenecker

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Sara Emmenecker '04 AM'11
Associate Director, Stewardship Reporting
Donor Relations
she/her

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Sara_Emmenecker@brown.edu
alumni-friends.brown.edu

Brown University, Division of Advancement
Box 1893, Providence, RI 02912, USA

Deliveries: 350 Eddy Street, Providence, RI 02903



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Phase II



Phase II

170 mail-only stewardees: card insert in report, reminder postcard

NO POSTAGE
NECESSARY
IF MAILED
IN THE
UNITED STATES

BUSINESS REPLY MAIL
FIRST-CLASS MAIL PERMIT NO. 339 PROVIDENCE RI
POSTAGE WILL BE PAID BY ADDRESSEE

STEWARDSHIP OFFICE DIVISION OF ADVANCEMENT
BROWN UNIVERSITY
BOX 1893
1 PROSPECT ST
PROVIDENCE RI 02912-9939



The Impact of Your Giving to Brown University
July 2023 - June 2024

Would you like to continue receiving annual stewardship reports?

Brown's Office of Donor Relations enjoys sharing stories about the impact of philanthropy on campus and beyond, like those found in the enclosed stewardship report. But we realize that there may come a time when you no longer wish to receive these updates.

If you would like to continue receiving personalized, annual stewardship reports, you must respond by visiting go.brown.edu/MyReport, emailing us at donorrelations@brown.edu, or filling out the section below and returning this card to us via mail in the envelope provided.

Thank you for connecting with us and for your support!
Brown University Office of Donor Relations

Full Name: _____

Street Address: _____

City/State/Zip: _____

Email: _____

I prefer to receive my stewardship report electronically and cease mail delivery.



The Impact of Your Giving to Brown University
July 2023 - June 2024

FINAL NOTICE:
Respond by March 15, 2025 to continue receiving stewardship reports

Brown's Office of Donor Relations enjoys sharing stories about the impact of philanthropy on campus and beyond, like those found in your annual stewardship report that you received in late 2024. But we realize that there may come a time when you no longer wish to receive these updates.

If you would like to continue receiving personalized, annual stewardship reports, you must respond by **March 15, 2025** by scanning the QR code below, visiting go.brown.edu/MyReport, emailing us at donorrelations@brown.edu, or leaving a voicemail with your full name at +1 (401) 853-6500. This is your final reminder to respond if you would like to continue to receive stewardship reports.

Thank you for connecting with us and for your support!
Brown University Office of Donor Relations



Office of Donor Relations
Division of Advancement
Box 1893
Providence, RI 02912, USA



Scan to respond.



Phase II Results

170

Households
Targeted

21

Steward
Responses



19

Steward
Kept Active

149

Steward
Households
End Dated

70

Funds Made
Non Reportable

Year 1 By The Numbers

- **400+** Stewardees End Dated
- **195** Funds Made Non-Reportable
- **6** Funds Made Financials Only
- **78** Programmatic Funds Tiered Down



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Phase III



Phase III: Maintenance Mode

18 stewardees (14 households): 3 personal emails

Would you like to continue receiving Brown University stewardship reports?

Emmenecker, Sara <sara_emmenecker@brown.edu>

Thu, Jun 5, 2025, 3:47F

Dear Jane,

Brown's Office of Donor Relations enjoys sharing stories about the impact of philanthropy beyond, like those found in your annual stewardship report. Each fall, you receive an email annual stewardship report is available to download from the secure myBrown portal. Your report includes narrative and financial information on the funds that you, your family, or others es; we also realize that there may come a time when you no longer wish to receive these updat

If you would like to continue receiving personalized, digital annual stewardship reports, please clicking the link below, or responding to this email.

[Continue receiving digital reports](#)

We want to ensure we are contacting you at the correct email address; if we don't hear from you by August 15, 2025, we will discontinue sending your digital annual impact reports.

Thank you for connecting with us and for your support!

Sincerely,
Sara Emmenecker



Second Notice: Would you like to continue receiving Brown University stewardship reports?

Emmenecker, Sara <sara_emmenecker@brown.edu>

Wed, Jul 9, 2025, 10:39F

Dear Jane,

Brown's Office of Donor Relations enjoys sharing stories about the impact of philanthropy beyond, like those found in your annual stewardship report. Each fall, you receive an email annual stewardship report is available to download from the secure myBrown portal. Your report includes narrative and financial information on the funds that you, your family, or others es; we also realize that there may come a time when you no longer wish to receive these updat

If you would like to continue receiving personalized, digital annual stewardship reports, please clicking the link below, or responding to this email.

[Continue receiving digital reports](#)

We want to ensure we are contacting you at the correct email address; if we don't hear from you by August 15, 2025, we will discontinue sending your digital annual impact reports.

Thank you for connecting with us and for your support!

Sincerely,
Sara Emmenecker

Final Reminder: Your Brown Stewardship Report – Respond by August 15

Emmenecker, Sara <sara_emmenecker@brown.edu>

Thu, Aug 14, 2025, 11:14 AM

Dear Jane,

This is a **final reminder** regarding your preference for receiving your annual digital stewardship reports.

As previously communicated, if you'd like to continue receiving these personalized updates on your philanthropic impact, please **click the link below or reply to this email by tomorrow, August 15, 2025.**

[Continue receiving digital reports](#)

If we don't hear from you by the deadline, we'll discontinue sending digital notifications for your reports. Thank you for your continued support of Brown University.

Sincerely,

Sara Emmenecker
Brown's Office of Donor Relations



Phase III Results

14

Households
Targeted

8

Household
Responses



8

Households
Kept Active

6

Steward
Households
End Dated

5

Funds Made
Non Reportable



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Phase IV

Phase IV: Organizations

42 organizations: Insert in FY25 reports



Would you like to continue receiving annual stewardship reports?



Brown's Office of Donor Relations enjoys sharing stories about the impact of philanthropy on campus and beyond, like those found in the enclosed stewardship report. But we realize that there may come a time when you no longer wish to receive these updates.

If you would like to continue receiving personalized, annual stewardship reports, **you must respond** by visiting go.brown.edu/MyReport or emailing us at donorrelations@brown.edu by January 16, 2026.

Thank you for connecting with us and for your support!
Brown University Office of Donor Relations



Scan the QR code or visit go.brown.edu/MyReport to continue receiving annual stewardship reports.



Brown University Office of Donor Relations Annual Stewardship Reports

If you would like to continue receiving personalized, annual stewardship reports, please **submit the form below**.

Contact donorrelations@brown.edu with any questions. Thank you for your support.

* Indicates required question

First Name *

Your answer

Last Name *

Your answer

Organization (if applicable)

Your answer

Email address

Your answer

Street Address

Phase IV Results

42

Organizations
Targeted

1

Organization
Response



1

Organization
Kept Active

41

Organization
Stewardees
End Dated

33

Funds Made
Non Reportable

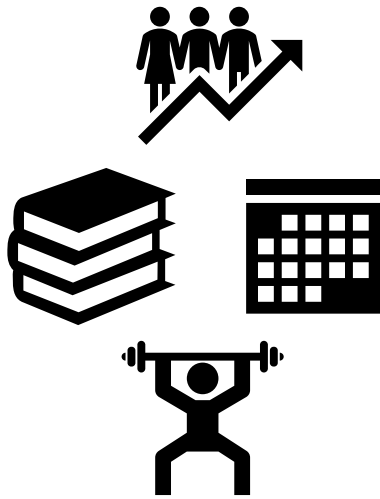
Results to Date: Cumulative Impact

- **477+** Stewardees End Dated
- **233** Funds Made Non-Reportable
- Report Access: **13%** (FY22) → **30%** (FY25)

Lessons Learned

- Challenge Legacy Beliefs and Think Creatively About Sustainability
- Frame the Narrative
 - Steward those who want to be stewarded
 - Reallocation, not reduction
- The “Low Risk” Blueprint
 - Start with the low hanging fruit: conservative, data-driven criteria
 - When a door opens, go through
 - Continue the acquisition and retention approach: constantly monitor, evaluate, adjust
- Hidden Wins (Celebrate these!)
 - Data hygiene
 - Donor lifecycle insights

Closing: The Payoff



Traditional Stewardship

“Once a stewardee,
always a stewardee.”



Acquisition & Retention Mindset

ROI-focused,
Data-driven segmentation

Questions?



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Sara C. Emmenecker

Associate Director, Stewardship Reporting

Sara_Emmenecker@Brown.edu



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