

2026 ADRP Northeast – Mid-Atlantic Regional Conference

May 15 | SUNY Global Center
New York, New York



ASSOCIATION OF
DONOR RELATIONS
PROFESSIONALS

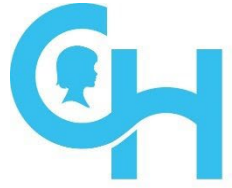
BUILDING
RELATIONSHIPS
FOR GOOD

™



ASSOCIATION OF
DONOR RELATIONS
PROFESSIONALS

BUILDING
RELATIONSHIPS
FOR GOOD



Children's Hospital
of Philadelphia®

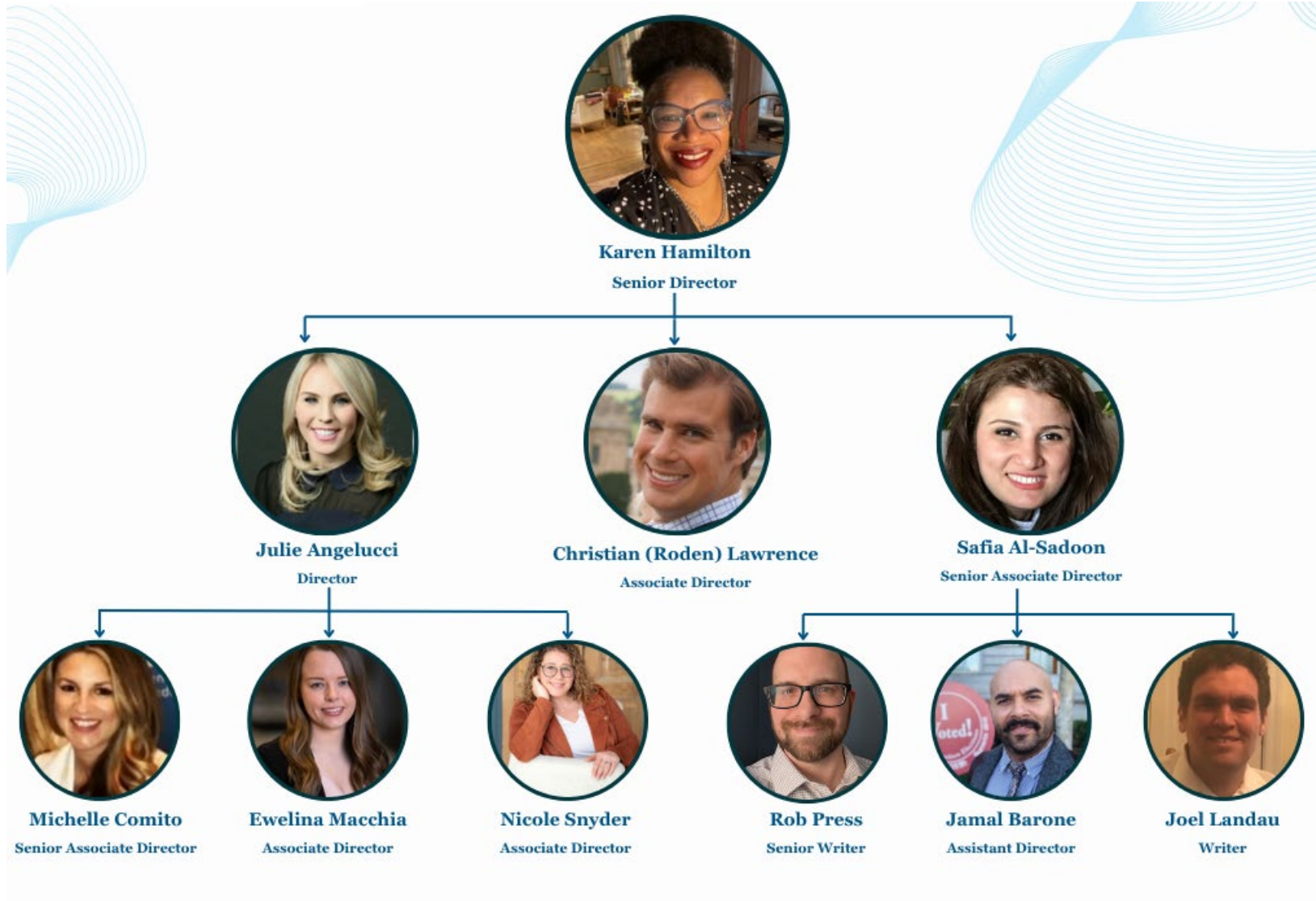
Stewardship by Design, Not by Default



Safia Al-Sadoon, MPA, PMP
**Senior Associate Director
of Donor Relations**



Who We Are



Agenda

- The Reactive Trap
- A Shift in Mindset
- Roadmap
- Results
- Strategic Stewardship in Practice
- Key Takeaways



What comes to mind when you hear “reactive stewardship”?



menti.com

9466 4232

The Reactive Trap

We're all doing good work... but are we doing it proactively?

- Work begins after request submission
- Peak seasons overwhelm teams
- Limited coordination across portfolios

Stewardship = output, not strategy

A Shift in Mindset



**FULFILLMENT →
STRATEGY**



**FROM REQUESTS →
ANTICIPATION**



**FROM TASK COMPLETION
→ INTENTIONAL DONOR
EXPERIENCE**

The Roadmap



FOUNDATIONAL ENABLERS



Step 1: Align Teams

Start With Relationships

- Educate teams on Donor Relations offerings
- Regular meetings with each gift team



Step 2: Audit Gifts



Anticipate, Don't Wait

- Quarterly Principal Gifts audits
- Proactive tracking of reporting timelines
- Early stewardship planning with Gift Officers



ASSOCIATION OF
DONOR RELATIONS
PROFESSIONALS

BUILDING
RELATIONSHIPS
FOR GOOD

**How do you currently
identify reporting
needs?**



menti.com
9703 9199

Step 3: Build Visibility

Visualize and Plan

- Stewardship calendar
- Weekly check-ins
- Workfront dashboards

STAFF	JULY	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE
Staff A		Project Alpha ThankView	Endowed Report Editing	Major Donor Report	Stewardship Video Refresh		Signature Event ThankView		Narrative Collection	Endowed Chair Outreach	PI Follow-up	Planning
Staff B			Acknowledgment Refresh	Corporate Report		Holiday Stewardship		Family Fund Report	Postcard Mailing	ThankView Follow-up	Stewardship Calls	
Staff C	Partner Letters	Stewardship Videos	ThankView Support	Endowed Reports	Acknowledgments Management		Annual Giving Templates	Children's Fund Report	Endowed Narrative Review		Quarterly ThankView Refresh	Summer Planning

Step 3: Build Visibility

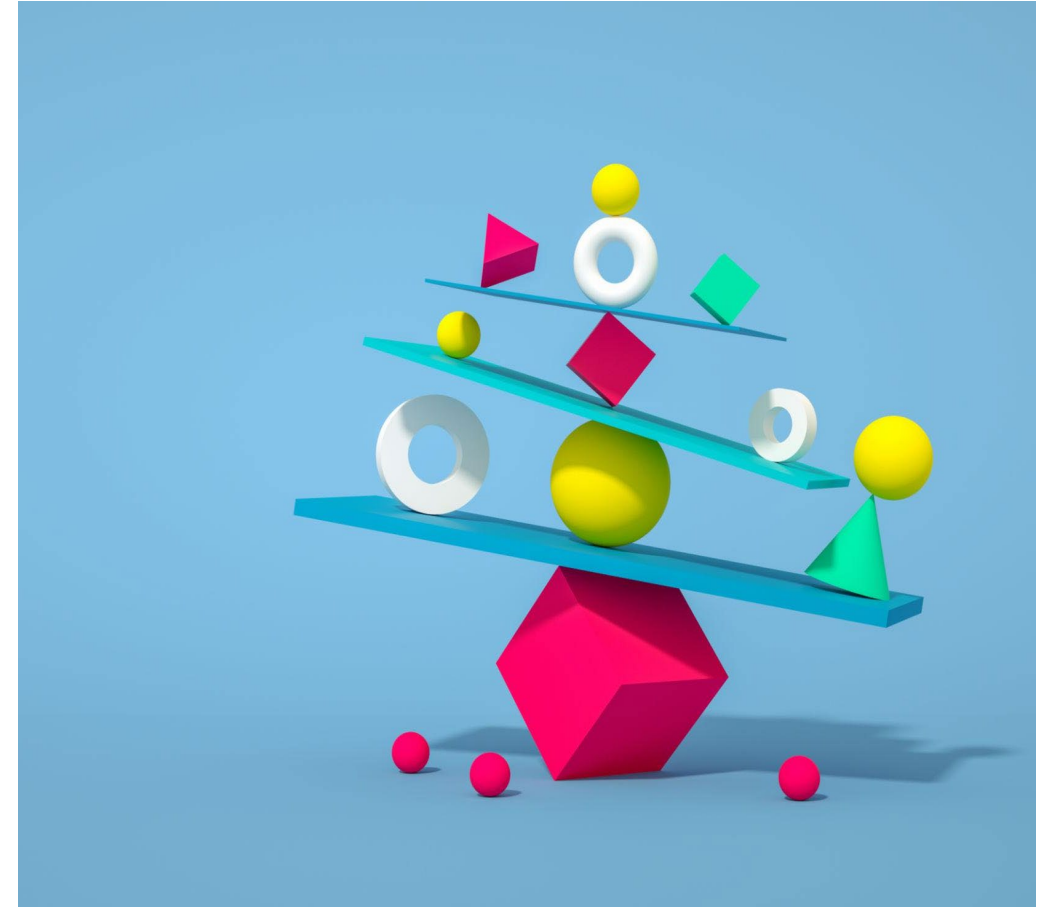
- Centralized Stewardship Pipeline

Research Rating	Report Tier	Total Giving	Account Name	Account Owner	Upcoming Touchpoint	Reporting Timeline	Strategic Notes	Recommendation	Q1 Check-In	Q2 Check-In	Q3 Check-In	Q4 Check-In
\$\$-\$\$	Tier 1	\$XXM	Project A	GO Lead	On Hold	FY26–FY27	Delay annual report to avoid overlapping active solicitation	DR to provide guidance on report timing once proposal is sent	Completed	Follow-up needed	Pending	Review after donor proposal
\$\$-\$\$	Tier 2	\$XXXX	Project B	GO Lead	Active	One-time reporting	Events stewardship sufficient this cycle. Additional DR touchpoint paused.	Is additional report still needed?	Completed	Completed	Pending	Reassess after solicitation
\$\$-\$\$	Tier 2	\$X.XM	Project C	Executive Lead	Under Review	Multi-year reporting	Existing FY24 report still under review. Recommend delaying next cycle until finalized.	Any upcoming solicitation after report is delivered?	Escalated	In Progress	Pending	Reassess after solicitation

Step 4: Balance Workload

Rethink Timing

- Shifted 200+ reports to summer
- Started high-complexity projects earlier
- Moved non-deadline work to off-peak seasons



Step 5: Manage Capacity Challenges



Doing More with What You Have

- Cross-trained team members
- Leveraged individual strengths
- Balanced workload intentionally
- Built regular debriefs

Build Trust with Gift Officers

One Size Does Not Fit All

1

**Adapt to individual
working styles**

2

**Build Strategic
Partnerships**

3

**Shift from
Transactional to
Strategic**

Use Data to Drive Decisions

- Golf Classic ThankView
 - Total Sent: 178
 - Opened: 46.1%
 - Clicked: 16.3%

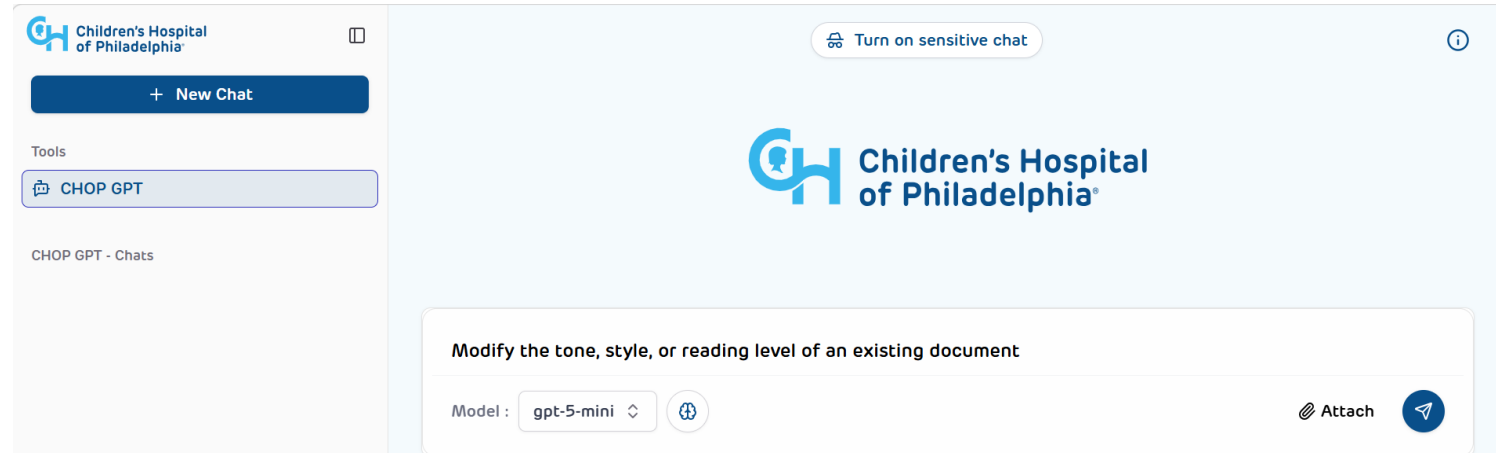
Data only matters if it changes
how you think and work.







Use AI Thoughtfully

Support—not replace—human strategy

- Refine narratives
- Summarize research
- Improve efficiency and consistency



Results

-  **300+ reports delivered earlier**
-  **Higher engagement and stronger conversations**
-  **Proactive planning and pipeline visibility**
-  **Stronger partnerships and less burnout for staff**



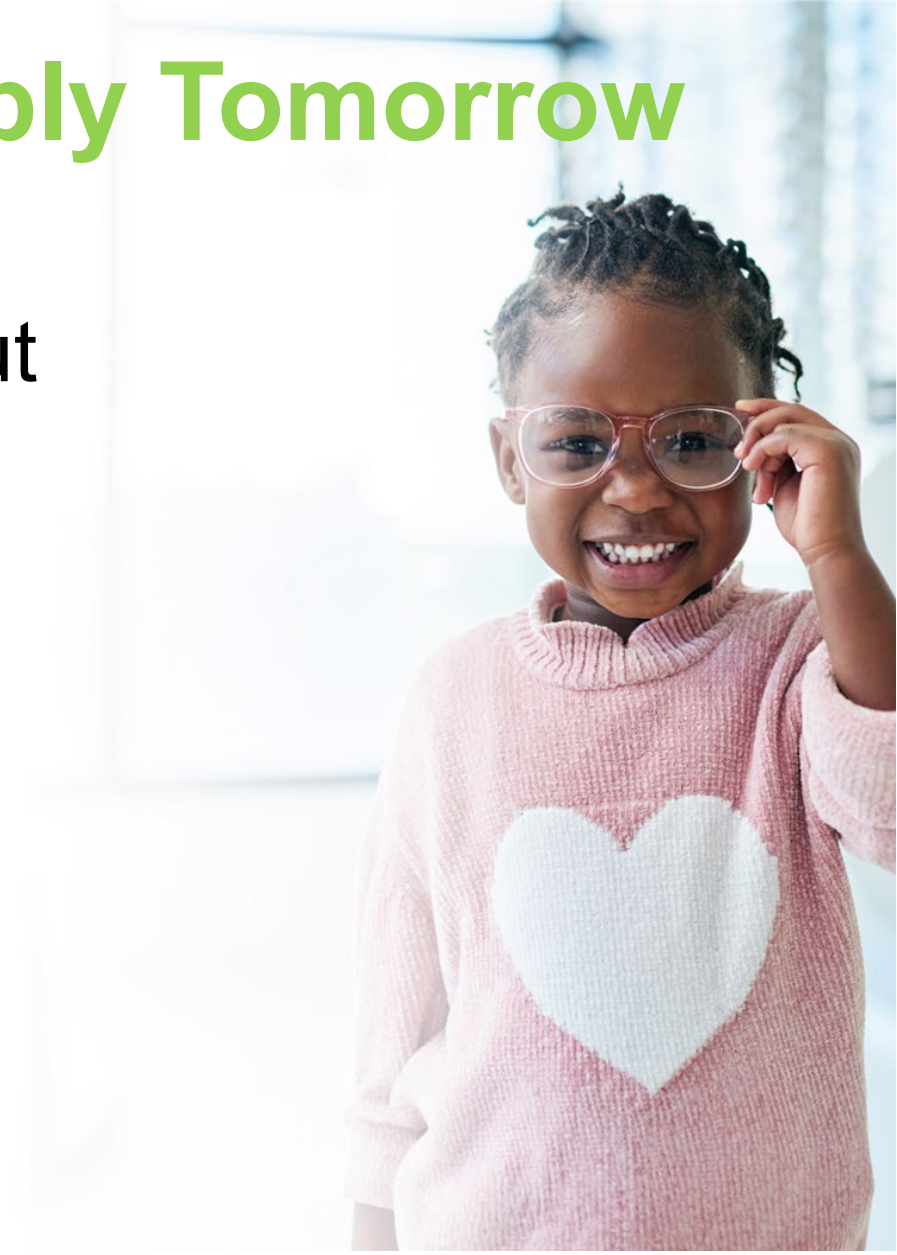
Strategic Stewardship in Practice





Key Takeaways: What to Apply Tomorrow

Proactive stewardship is less about producing more reports and more about creating a better donor experience and healthier workflows for teams.



Key Takeaways: What to Apply Tomorrow

- Start stewardship conversations earlier
- Build partnerships, not fulfillment queues
- Make your pipeline visible
- Adjust timing before adding more work
- Use data to guide decisions
- Let AI support the work — not drive it





ASSOCIATION OF
DONOR RELATIONS
PROFESSIONALS

BUILDING
RELATIONSHIPS
FOR GOOD

Thank You

Questions?

Safia Al-Sadoon, MPA, PMP
Senior Associate Director of Donor Relations
AlSadoons@chop.edu





AD
RP

ASSOCIATION OF
DONOR RELATIONS
PROFESSIONALS