

**Pledge Reminders:
Opportunities for Stewardship**

Gail Ferris
Director, Technology and Information Services
Office of Development and Alumni Relations
American University

**Pledge Reminders:
Opportunities for Stewardship**

- Premises for optimizing stewardship through pledge reminders
 - Effective pledge reminders are the product of work by many staff over time
 - Donor-centric approach results in greater support
 - Build in monitoring check points at all stages of the process
 - Remember that pledge reminders are a key stepping stone to the next gift

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**Pledge Reminders:
Opportunities for Stewardship**

- Roles in Pledge Reminder Administration
 - Fundraiser
 - Determine intent of donor
 - Purpose
 - Payment schedule
 - Control donor expectations
 - Promise only what institution can deliver
 - Communicate accurate information with regard to pledge to gift-processing staff

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**Pledge Reminders:
Opportunities for Stewardship**

- Roles in Pledge Reminder Administration
 - Gift Processing
 - Enter pledges to reflect donor intent
 - Reflect purpose properly
 - Reflect accurately timing and amounts of installments
 - Enter payments as received
 - Apply payments promptly
 - Ensure linkage to proper fund

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**Pledge Reminders:
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- Roles in Pledge Reminder Administration
 - Biographic Records staff
 - Maintain name as donor prefers it
 - Track preferred address of donor
 - Home
 - Work
 - Seasonal

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**Pledge Reminders:
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- Roles in Pledge Reminder Administration
 - Systems staff
 - Ensure that database tracking pledges is
 - Accurate
 - Available
 - Failure to do this may result in satellite databases
 - Produce reminders on schedule indicated by donors and institutional policy

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**Pledge Reminders:
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- Roles in Pledge Reminder Administration
 - Donor Relations staff
 - Serve as interface between gift-processing staff and fundraisers
 - Review reminders for accuracy
 - Determine the most appropriate means by which to apprise donors of the state of their commitments

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**Pledge Reminders:
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- Attributes of a donor-centric pledge reminder process
 - Confirm that the terms of pledges accurately reflect the donors' intent in the fundraising database, particularly in
 - Pledge amount
 - Pledge purpose
 - Schedule on which pledge will be paid
 - Payments received
 - Payments due

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**Pledge Reminders:
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- Attributes of a donor-centric pledge reminder process
 - Develop report to extract pledge information in an easily understood format to inform donors of the status of the pledge
 - Produce pledge reminders on a schedule that reflects both donor intention and institutional priorities

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**Pledge Reminders:
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- Attributes of a donor-centric pledge reminder process
 - Vest responsibility in donor relations for the review of pledge reminders, including:
 - Reviewing pledge reminders
 - To make sure that the reminder is professional in appearance and does not contain inaccurate information
 - To make sure that the approach being followed with individual donors is consistent with, and serves to optimize, ongoing fundraising activity

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**Pledge Reminders:
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- Attributes of a donor-centric pledge reminder process
 - Vest responsibility in donor relations for the process of disseminating pledge reminders, including:
 - Determining with fundraisers reminders that they will be personally responsible for delivering to donors
 - Sending out all reminders not disposed of by fundraisers
 - Record in the fundraising database what action was in fact taken to remind each donor of the pledge

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**Pledge Reminders:
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- Desired outcomes from pledge reminder process
 - Ensure that institution receives funds promised by donors in their pledge commitments
 - Ensure that donors are properly stewarded to provide a foundation for cultivation for their next gifts

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**Pledge Reminders:
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- Pledge reminders from the donor's point of view
 - What would YOU like to have happen if you were the donor?
 - Thank for support of the institution
 - Show how donor's commitment is making a difference
 - Give an accurate accounting of
 - How much is paid to date
 - How much is currently due
 - How much remains to be paid

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**Pledge Reminders:
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- Pledge reminders from the fundraiser's point of view
 - Use as opportunity to "get in the door" with the donor
 - Thank donor for past support
 - Answer questions that the donor may have
 - Make donor aware of new developments at institution that could become objects of donor's support in the future

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**Pledge Reminders:
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- Summary of basic principles for optimizing pledge reminder stewardship
 - Effective pledge reminders are the product of work by many staff over time
 - Donor-centric approach results in greater support
 - Build in monitoring check points at all stages of the process
 - Remember that pledge reminders are a key stepping stone to the next gift

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