

Donor Relations Architecture

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You keep using that word

**I do not think it means what you
think it means.**

History



From Old English *stíweard*, or household

Servant who supervised the Lord's estate and household, earning **3 to 4** pounds a year

Took care of the lord's castles when he was away and checked on his serfs' taxes

History

Contemporary stewards take care of:

- People on planes and ships
- Churches
- Trees, the earth, the ocean
- Investments
- Wine



Definition

In broad usage:

One who manages property or other affairs for someone else

In advancement:

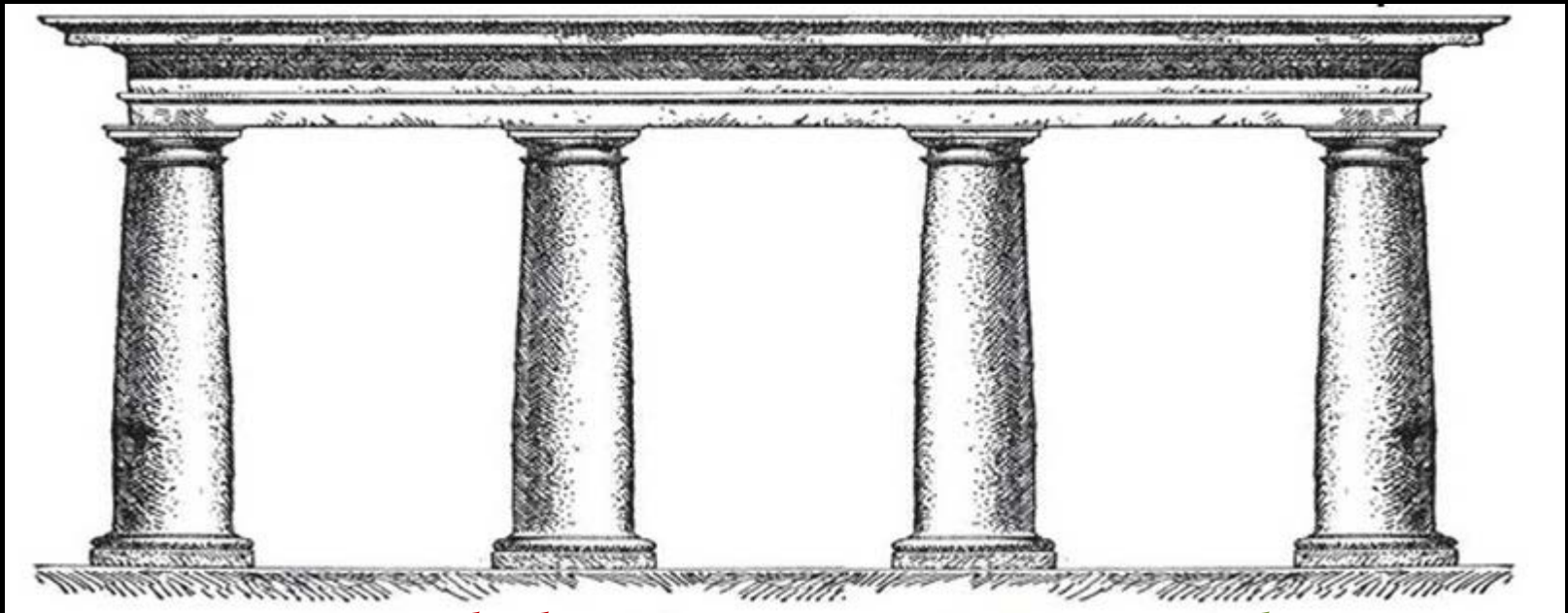
One who ensures that donors gifts are used as donors intended

Definition and theory

- One does not steward a prospect. One *cultivates* a prospect. But one can use stewardship as a cultivation tool.
- To be a good steward, you don't actually have to do the stewardship. But you do need to make sure it gets done.
- Stewardship is most effective when delivered by the person or program most directly benefitting from the gift.

Four pillars

Acknowledgment **Reporting** **Recognition**
Engagement



Stewardship

Donor Relations

Donor Relations

Stewardship and
Impact reporting

Acknowledgment

Recognition

Engagement

Retention

Growth

Influence

Nondonors

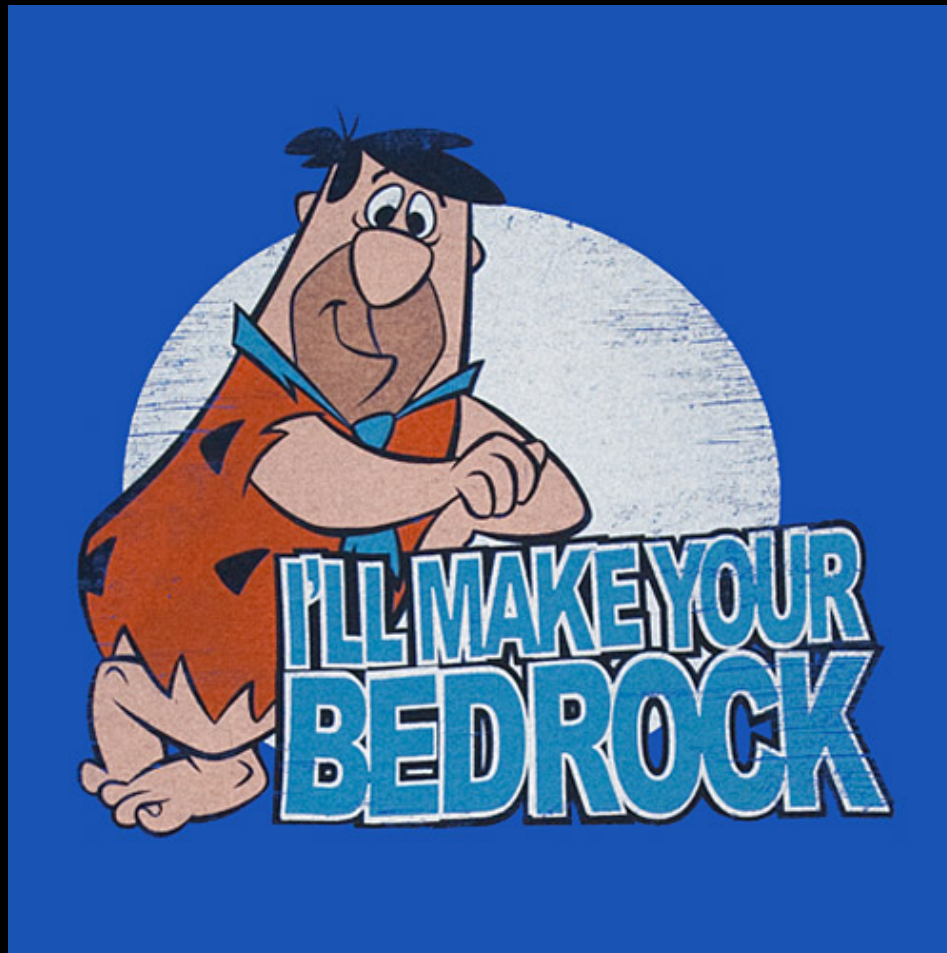


The Foundation is so Important





Gift Acceptance, Acknowledgment



Stewardship and Impact Report

University of Idaho Foundation, Inc.

CONSOLIDATED INVESTMENT TRUST (CIT)
Fiscal Year 2013 Highlights: July 1, 2012 - June 30, 2013

CIT Portfolio Market Value 6/30/2013
\$207,625,658

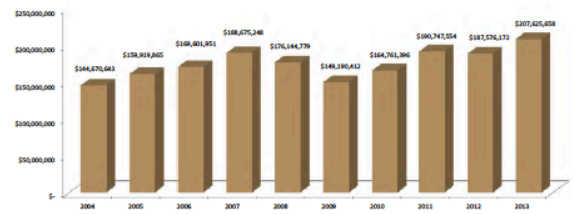
CIT Total Rate of Return for FY13
1 Year -11.2% | 3 Year - 10.0%

CIT Earnings Distributed Since
Establishment on 7/1/1959
\$136,159,588

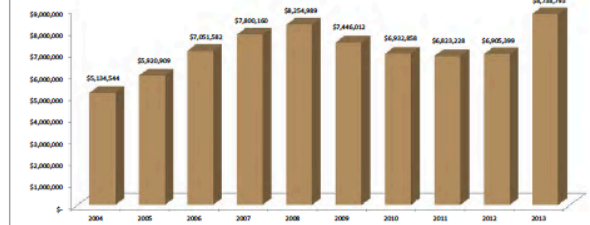
FY13 CIT Earnings Distributed

Scholarships & Student Loans	\$ 5,404,136
Academic Programs & Research	3,100,874
Life Income Beneficiaries	108,894
UI Foundation & Affiliates	124,889
Total	\$ 8,738,793

CIT Portfolio Market Value: Fiscal Year 2004 - Fiscal Year 2013



CIT Earnings Distribution: Fiscal Year 2004 - Fiscal Year 2013



The University of Idaho Foundation, Inc. and the Consolidated Investment Trust (CIT) undergo an independent annual audit conducted by EideBaily LLP. The audited statements are available online at www.uiohiofoundation.org.

Total Number of CIT Endowments 6/30/2012: 1,332
New Endowments Established During Fiscal Year 2013: 19

To make a gift, please visit us online at www.uiohio.edu/giving

Donor Engagement and Recognition

- Donors Want Three Things:
 - Access
 - Information
 - Experience



Valentino
Studded Clutch
\$3,045



MANGO
Studded
Clutch
\$70

WHAT DO YOU MEAN



**IT TAKES 2 WEEKS
TO THANK A DONOR?**

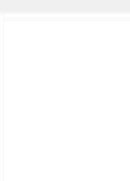
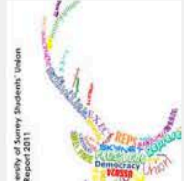
Acknowledgments

- MUST

- Gift Agreements
- Timely Receipts
- Leadership Acknowledgments
- Online Giving Confirmation

- LUST

- Impact Videos
- Hand Written Notes from Leadership
- Online Thank Yous that Change with Designation



Stewardship and Reporting

- MUST

- Fiscal Reporting
- Narrative Reporting
- Accountability
- Transparency
- All funds spent and spent according to donor intent

- LUST

- Impact Videos
- Unrestricted Reporting
- Storytelling

LUST



RWANDA

meet jean bosco.

Shy and sturdy, he carried a 20 gallon Jerry Can on his head with a banana as the cork. Only 15 years old, his days were filled fetching water. Four to five times a day, he walked back and forth to a brown, murky, stagnant pond.

[READ THE STORY >](#)

LUST

UGANDA

will the beautiful
women of the world
please stand up.

This is when I met Helen Apio. Placing both hands on my shoulders and smiling, she said, "Now, I am beautiful." That really hit me. My job is to focus on sustainable development, health, hygiene and sanitation; to make sure charity water's projects are working in 20 years. But nowhere on any of my surveys or evaluations was a place to write, "Today we made someone feel beautiful."

[READ THE STORY >](#)



I SHOULD REWARD MY DONORS



Donor Recognition

- MUST

- Giving Societies?
- Telling Donor Stories
 - All kinds all levels
- Recognition Events
- Gift announcement

- LUST

- Nomination for Awards
- Donor Recognition Web presence
- Digital Donor Wall
- Thank a Donor Week



HELLO

my name is NOT

YOUR ATM

Donor Engagement

- MUST

- Meeting Recipients/Beneficiaries
- Stewardship visits or bringing them to your organization
- Volunteer Opportunities

- LUST

- Engagement Tours
- Insider Updates
- Leadership Phone Calls
- Guest speaker initiations
- Represent organization at ceremonies

Thank You! Questions?

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