

# Full Circle: the Donor Relations' Cycle of Principal Gift Donors

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## Goals of the Presentation

- About Western University
- Overview of Donor Relations & Stewardship at Western
- *Full circle approach*
- Donor Relations Plans
- Implementation
- Donor Recognition & Stewardship Reports
- Internal review of Donor Relations Report



## Western University Quick Facts

- Founded in 1878



- 278,629 Living Alumni



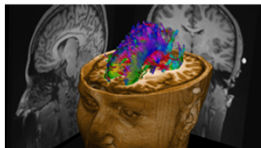
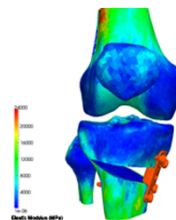
- 28,864 Students (Graduate & Undergraduate)



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## Some of Western's signature research areas

- Imaging
- Materials and Biomaterials
- Environmental Sustainability
- Green Energy
- Neuroscience/Brain and Mind



- Big Data
- Bone and Joint
- Philosophy of Science
- Management and Finance

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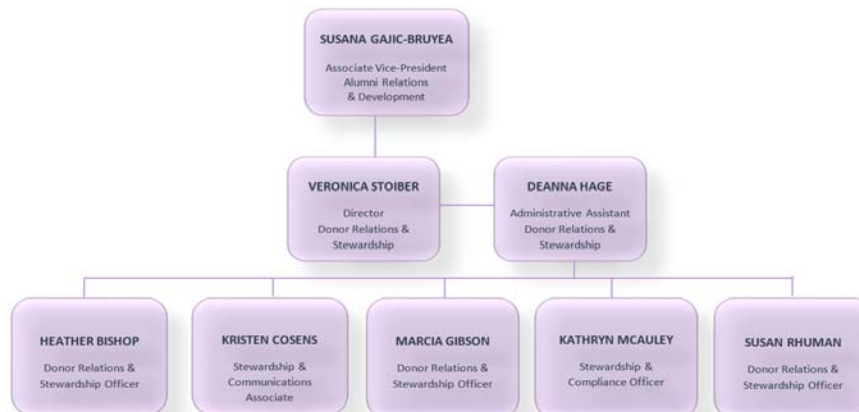
## Giving to Western



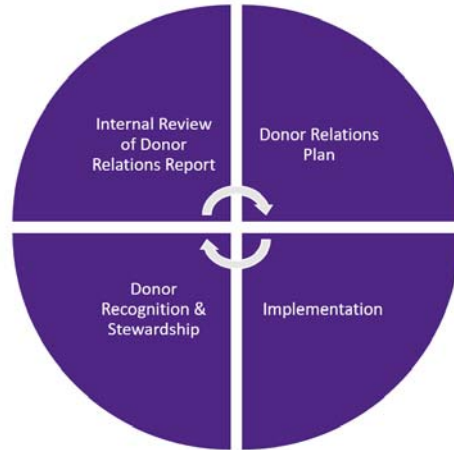
Gift Level		Donors
Principal Giving	(\$1,000,000 >)	205
Major Giving	(\$25,001 to \$999,999)	2,571
Leadership Giving	(\$1,000 to \$25,000)	21,244
Annual Giving	(< \$999)	202,230



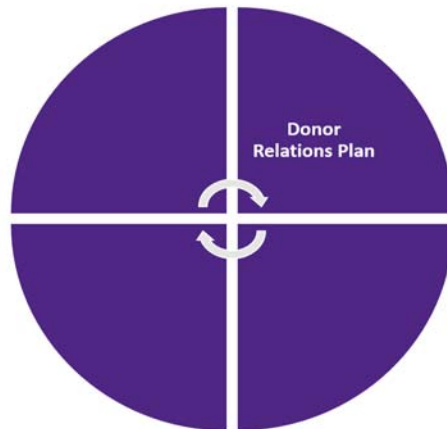
## Donor Relations & Stewardship Organizational Chart



## *Full circle approach*



## *Full circle approach*



## Donor Relations Plan

How do we create the plan?



- Developed a checklist to use as a guide when having discussions with development staff and the senior team to ensure we consider all options
- [Checklist Example](#)



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### **Recognition plan for Mr. John Smith and the Smith Foundation**

**Western University**

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**
- 2. Events**
- 3. Donor Recognition**

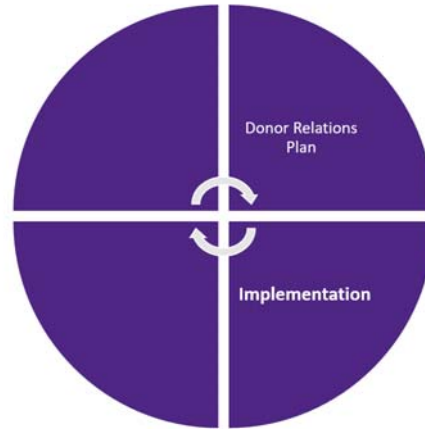
## Enhanced Donor Relations



## Tour of Robarts Research Institute



## Full circle approach



## Implementation

Major consideration: How do we record the plan on our system?

- Western uses PeopleSoft (in the process of selecting a new system)
- We needed a “home” for all the data we were collecting using checklists and meetings, so we worked with colleagues in Advancement Services to make this possible
- Root of the recognition and stewardship plan is a Donor Relations Strategy
- Donor Relations Strategy for Principal Gifts donors 1M+ vs Stewardship Strategy for donors \$25,000 to \$999,999



## Implementation

How do we assign responsibilities and track what has happened or needs to happen?



- We have great teams and staff that have defined roles, which makes it easier
- Director of Donor Relations and Stewardship works with Events and Communications teams to ensure they have the information they need to execute the plan, but they manage their own work
- Stewardship Manager ensures that the Donor Relations Strategy is entered in our system
- Actions with an expected completion date that are linked to the Donor Relations Strategy are monitored by the Stewardship Manager to ensure completion

## Implementation



**Prospect Manager (PM)** – manages the donor relationship with Western

**Stewardship Manager (SM)** – manages collaboration among teams and tracks activity/deliverables that occur after a gift is booked.



## Full circle approach



## Donor Recognition & Stewardship

DRS provides reports to donors on the financial status and impact of their giving:

- Impact reports
- Endowed reports
- Expendable reports
- Student Recipient Reports



DRS also prepares a report to be shared with the donor which includes all the recognition honouring their last principal gift (usually within a years time)

# Celebrating a Milestone Birthday



## Donor Recognition

Be Extraordinary.  
The Challenge 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, Ph.D., former Ivey Business School Librarian Emerita

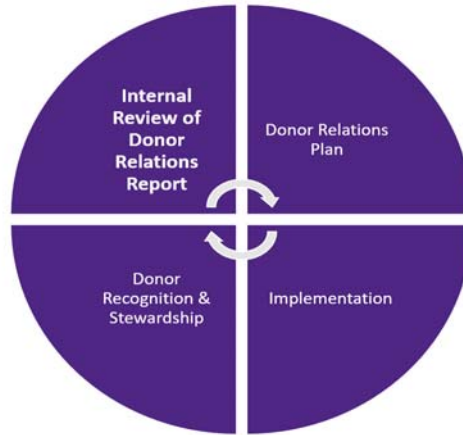


Thank you so much for your extraordinary gift to support Western University.

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## Full circle approach



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### Internal review of Donor Relations Report

- Internal report that shows the Donor Relations Strategy and status of related activity and touchpoints 
- Stewardship Managers review the reports for the donors they manage and use the document to discuss past progress on the plan and future needs with Prospect Managers and senior staff 
- Report shows activity by many teams and Departments – not just the Donor Relations and Stewardship team – and how it all comes together [Report Example](#) 

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## Internal review of Donor Relations Report

Donor Relations Strategies and Stewardship Strategies are closely related and overlap, although start and end dates vary



**Donor Relations Strategy** usually ends when the donor makes their next 1M+ gift or when they are in cultivation/solicitation for the next gift (varies with pledge term or other factors).

The Prospect Manager takes on a greater responsibility for keeping the donor engaged and getting them interested in something new

**Stewardship Strategy** follows our new reporting guidelines to encourage Targeted Stewardship rather than Perpetual Stewardship

## Internal review of Donor Relations Report



**Stewardship Reporting Guidelines** – developed in consultation with Senior Leaders and introduce a reporting period for a specific gift. Other communications and engagement continue.

- **Expendable Gifts** – have a logical beginning and end date, and we report until the gift is spent or the pledge period ends. Infrastructure funding is an exception
- **Endowed Gifts** – Review year is set at 5 years for gifts of \$25,000 to \$999,999 and set at 10 years for gifts of \$1M+

Thank you!



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