



Creating Individualized Stewardship Plans for Your Top Donors

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Agenda

- Initial roll-out
- Implementation
- Key take-aways
- Discussion/Questions

What is an
individualized
stewardship plan
(ISP)?

(Quick) “411” on MIT

- Resource Development vs. Alumni Association
- Five Schools+College, decentralized model
- \$6.2B *Campaign for a Better World*, concluded June 2021
- Advance Web Database + robust intranet



Initial roll-out

What we knew we wanted

- Comprehensive
- Strategic, scalable, and sustainable
- Fundraiser buy-in
- (Self-)sufficiency among the frontline teams



How we got started

Selected a fundraising team:

MIT's Office of Leadership Giving (OLG),
\$100k+



- Robust infrastructure
- Appropriate donor audience
- Eager to partner with our team

Implementation

How we developed the process

- Identified key partners and advocates
- Presented at OLG frontline meeting
- Met individually with OLG gift officers (18 total)
 - started with the early adopters
 - continued by region
 - focused on NGNP \$100k+ to the campaign (of course, we did encounter exceptions!)
- Drafted plans and tasks
- Entered plans and tasks into Database
- Implemented processes for:
 - creating plans and tasks for new gifts
 - maintenance of existing plans

What we asked gift officers

1. What types of touches do you recommend?

(email updates, visits, formal reporting)

2. By whom?

(staff, gift officer, faculty, senior leader)

3. How often?

4. Are there special engagement opportunities in the coming year?

(reunion, committee meeting)

5. Are there important milestones to mark?

(fund anniversaries, birthdays)

Stewardship Tasks

Milestones:

- Fund Anniversaries
- Dedication Anniversaries
- Milestone Birthdays
- Lifetime Giving Achievements
- Approaching Giving Society Thresholds
- Major Reunions

More Considerations:

- Impact Reporting
- Meeting with beneficiary of support
- Send chair holder's book
- Suggest for a donor profile story
- Send photos/video of named space
- Invite to classroom lecture or sports event

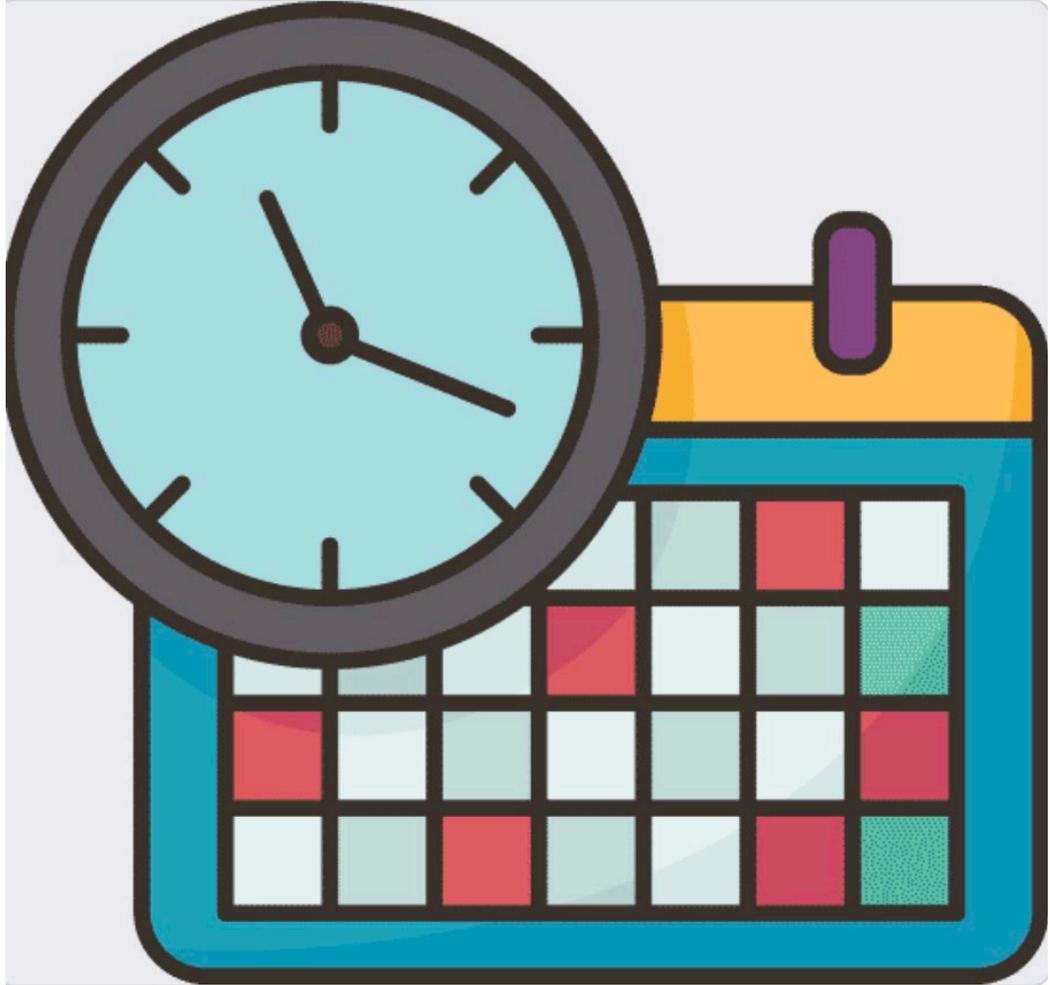
Role of Gift Officer Assistants (Embedded in frontline team)

- Monitors open tasks and brings to the Gift Officer's attention
- Closes tasks upon completion
- Cancels tasks that no longer need to occur
- Directs questions to DRS Associate
- Meets twice a year with DRS Associate

Initial Output

	# of gift officers	# of stew plans	# of stew tasks
Major Gift Fundraising Team (OLG)	18	353	544
Principal Gift Fundraising Team (OPP)	10	126	210

What we learned along the way



What we learned along the way



What we learned along the way



What we learned along the way





strategy with OPP

Expanded to Office
of Gift Planning;
School of
Humanities

It takes a Village:

Major Gift Fundraising Team + Schools

- DRS Director
- DRS Associate
- Gift Officer
- Gift Officer's Assistant
- Development Partners across campus

Principal Gift Fundraising Team

- DRS Director
- Senior DRS Officer
- Gift Officer
- Gift Officer's Assistant
- Development Partners across campus

FY22 Output

52 New Plans	101 Updated Plans
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Measuring ROI

Output

- # of donors/plans
- # of tasks
- # of fundraisers/offices

Outcome

- Donor retention
- Pledge fulfillment
- Increased giving
- Expanded engagement



Questions to ask yourself:

- Does it make sense strategically?
- Do you have the bandwidth to pull it off successfully *and sustain it*?
- Do you have the buy-in from your leadership?
- Are your gift officers willing to partner with you?
- What existing systems can you leverage?



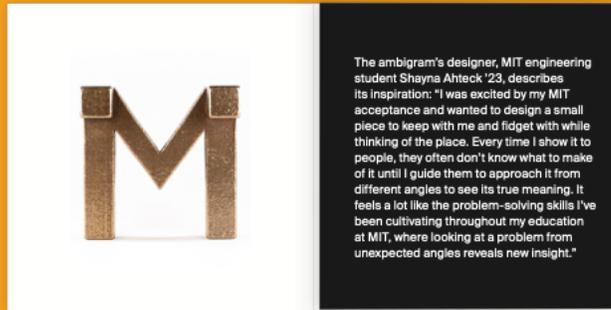
THANK YOU!

Gift
Ambigram Packaging - Trifold, black

Trifold booklet for inside box, 3.25x9.25"



Front



Interior, panel 1



Back



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