



AD
RP

Designing Stewardship That Works

ADRP Southeast Regional Conference
June 7, 2023

Hi! I'm Kendra, from LAS at Illinois.

- SDR director since 2021
- Illinois is an R1, public land-grant institution founded in 1867
- LAS is Illinois' largest college
 - Student population over 14,000 in AY 22-23
 - Over 189,000 alumni
 - 70 departments and interdisciplinary centers
 - Receive between 4500 and 6000 gifts each year
 - Over 1,700 gift funds & over 900 living major donors



We're a large shop with small shop problems.

- Historically, there had only ever been one SDR professional on the team
- Getting buy-in from administration for sufficient staff in advancement operations continues to be an uphill battle
- Lack of clarity re: division of responsibilities and everyone's role in stewardship
- Lots of missed opportunities for stewardship and engagement

This is a story
about solving
problems.

I like to ask “why?”

- Why are SDR professionals and MGOs not empowered to collaborate more?
- Why is stewardship often seen as “less than”?
- Why aren’t we all more invested in the outcomes of good stewardship work?
- How does anyone think we’re going to retain donors without providing good stewardship?
- How are we supposed to “do it all” when most of us remain critically understaffed?

Defining the Problem(s)

I wanted our stewardship program to be:

- Proactive
- Consistent
- Collaborative
- Creative

Acknowledging Constraints

Our limitations:

- One stewardship officer for 1700+ funds, 70 units, and 8 frontline fundraisers
- Large portions of our donor base were being ignored
- Segments of our program were completely outdated
- Limited resources
- Lack of creative confidence
- Lack of understanding within team

Reframing Expectations

Problems → Opportunities!

- Education of advancement and campus partners would be integral
- Facilitating meaningful collaboration would be crucial
- Empowering gift officers to understand their role in SDR was tantamount – everyone is on the stewardship team
- Building internal consensus was the first step

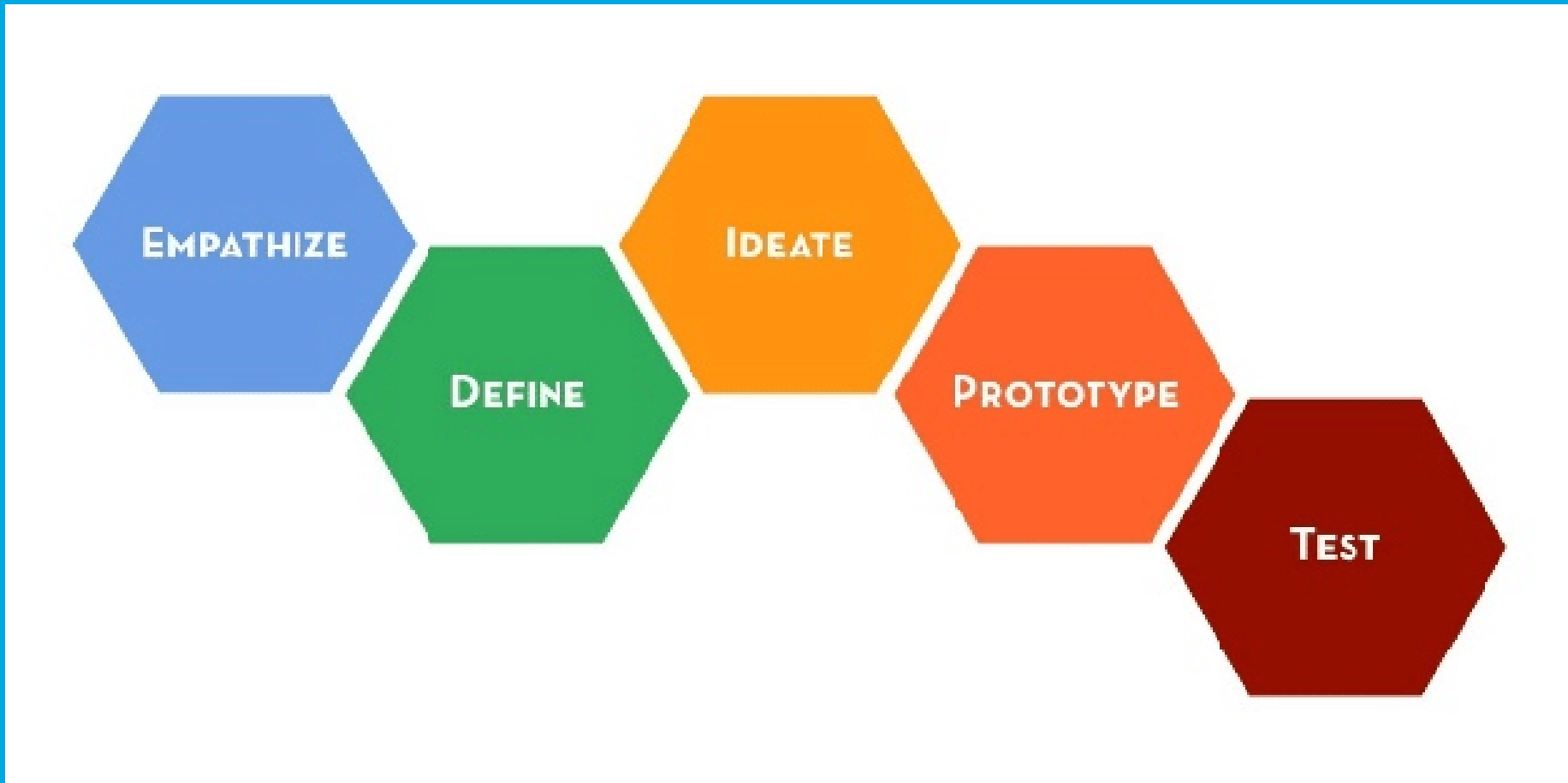
Wait! Where are these principles coming from?

- Defining the problem
- Acknowledging constraints
- Reframing expectations

Enter design thinking!

- **Design thinking** is a human-centered approach to creative problem-solving that relies on empathy, iterative brainstorming, and rapid prototyping to innovate solutions to difficult problems.
- **Design thinking** can empower us as SDR professionals to make the most out of what we have – to be creative within our constraints, reframe problems as opportunities, and empower cross-functional teams to collaborate to find new solutions.

Design Thinking



Designing Stewardship That Works!

A problem to solve:

Planned Giving Stewardship

This was a wicked
problem.

Wicked problems
are problems with
many
interdependent
factors, making
them seem
impossible to solve

Characteristics of wicked problems:

1. There is no definitive formula for a wicked problem.
2. Wicked problems have no stopping rule, as in there's no way to know your solution is final.
3. Solutions to wicked problems are not true-or-false; they can only be good-or-bad.
4. There is no immediate test of a solution to a wicked problem.
5. Every solution to a wicked problem is a "one-shot operation"; because there is no opportunity to learn by trial-and-error, every attempt counts significantly.
6. Wicked problems do not have a set number of potential solutions.
7. Every wicked problem is essentially unique.
8. Every wicked problem can be considered a symptom of another problem.
9. There is always more than one explanation for a wicked problem because the explanations vary greatly depending on the individual perspective.
10. Planners/designers have no right to be wrong and must be fully responsible for their actions.

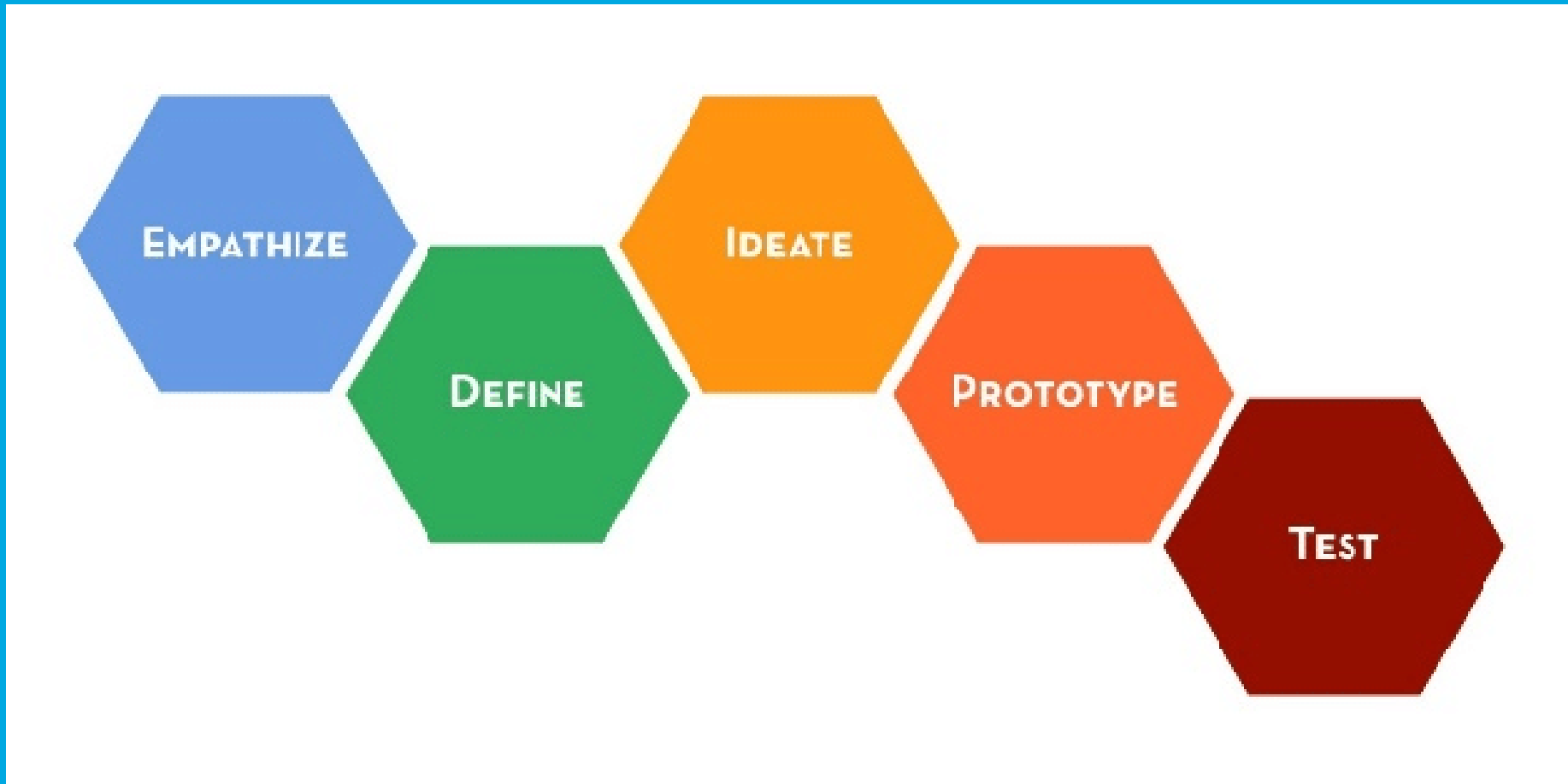
In other words:

- No roadmap
- Complex set of complicating factors
- High-stakes
- Unique

Wicked problems need creative solutions.

- **Design thinking** is a human-centered approach to creative problem-solving that relies on empathy, iterative brainstorming, and rapid prototyping to innovate solutions to difficult problems.
- It also builds empathy and collaboration skills amongst teams – especially those with disparate interests – allowing everyone to offer their expertise.
- It is particularly adept at helping to untangle wicked problems, and drive user-centered solutions that work with what you have.

Design Thinking



Using design thinking allowed us to:

- Encourage creative confidence among our team
- Build empathy and trust between SDR and major gift officers
- Collaboratively build out a much-needed portion of our SDR program
- Facilitate ownership in said program, so that it would actually be successful
- Work within the constraints that we had
- Drive solutions iteratively and rapidly

Getting started.

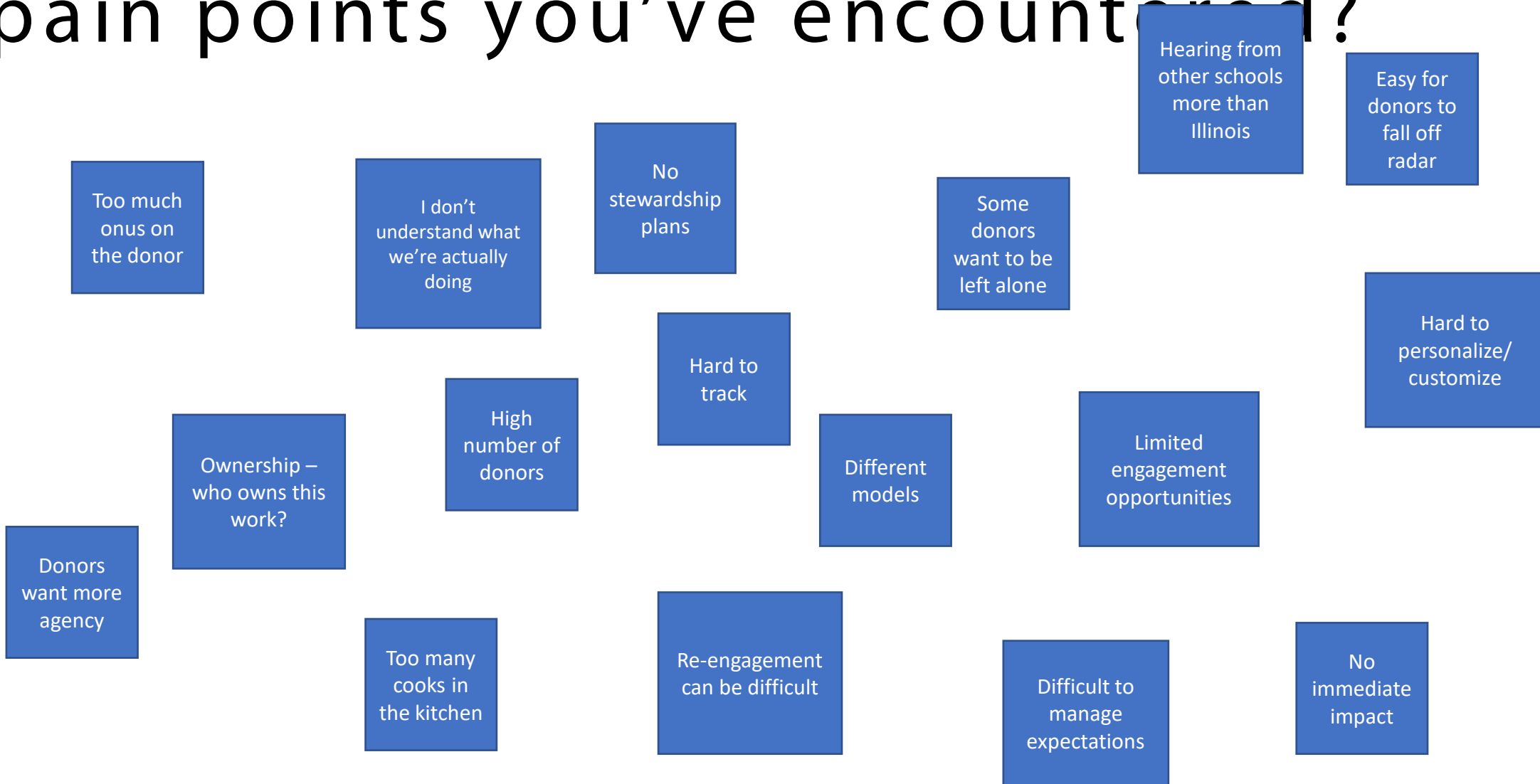
We started with questions.

1. What are some barriers and pain points you've experienced?
2. What are some successes you've encountered?
3. How do you feel about our approach to planned giving stewardship?
4. What might happen if we did nothing?
5. If we had infinite resources, what could this look like?

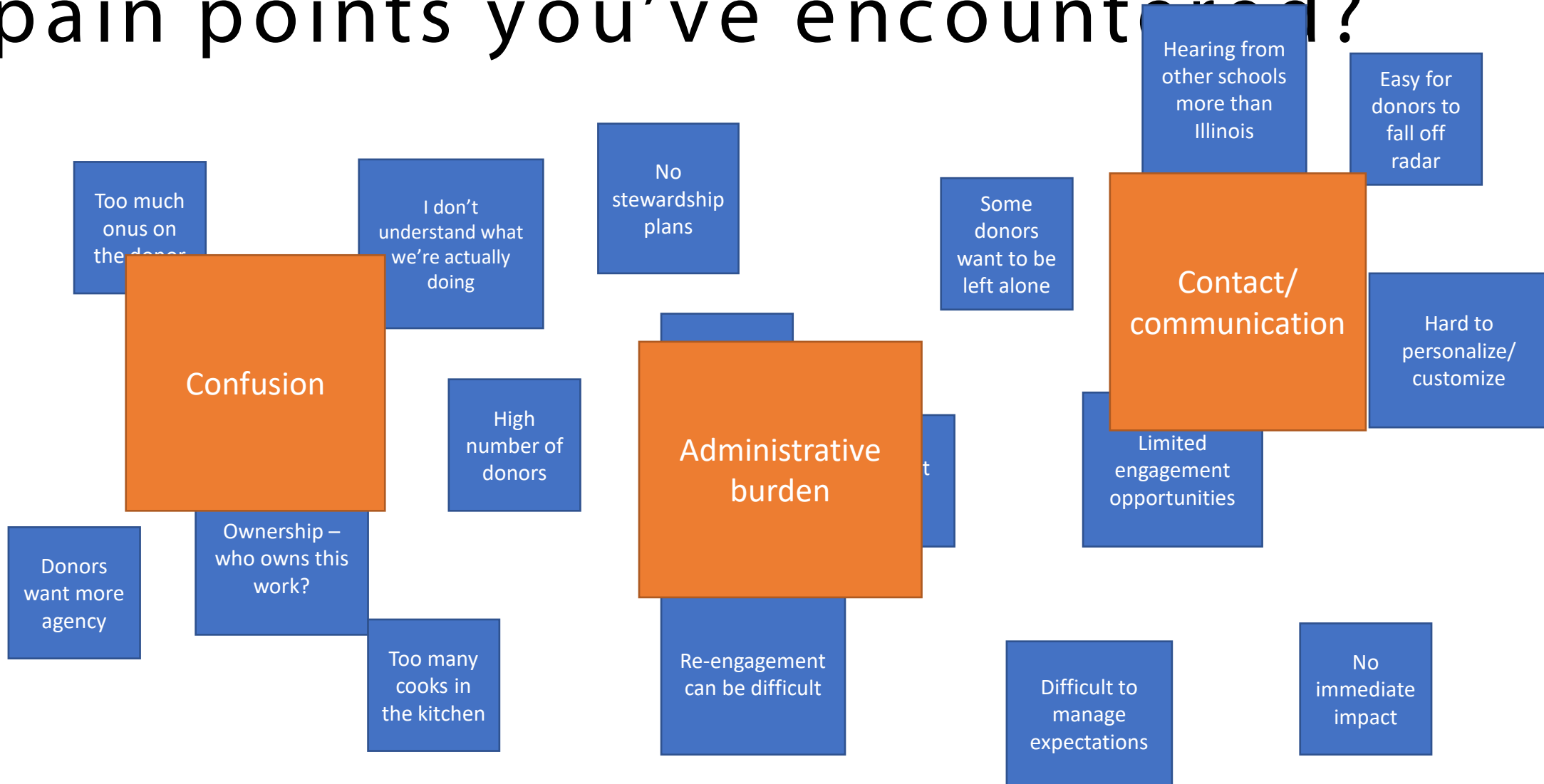
Asking these questions allowed us to:

1. Acknowledge our own limitations and constraints
2. Celebrate our successes
3. Understand what we would need to be successful
4. Discuss worst case scenarios
5. Employ imaginative (or “blue sky”) thinking

What are some of the barriers and pain points you've encountered?



What are some of the barriers and pain points you've encountered?



What are some successes you've encountered?

Really long-term relationships

Stewardship can retain donors

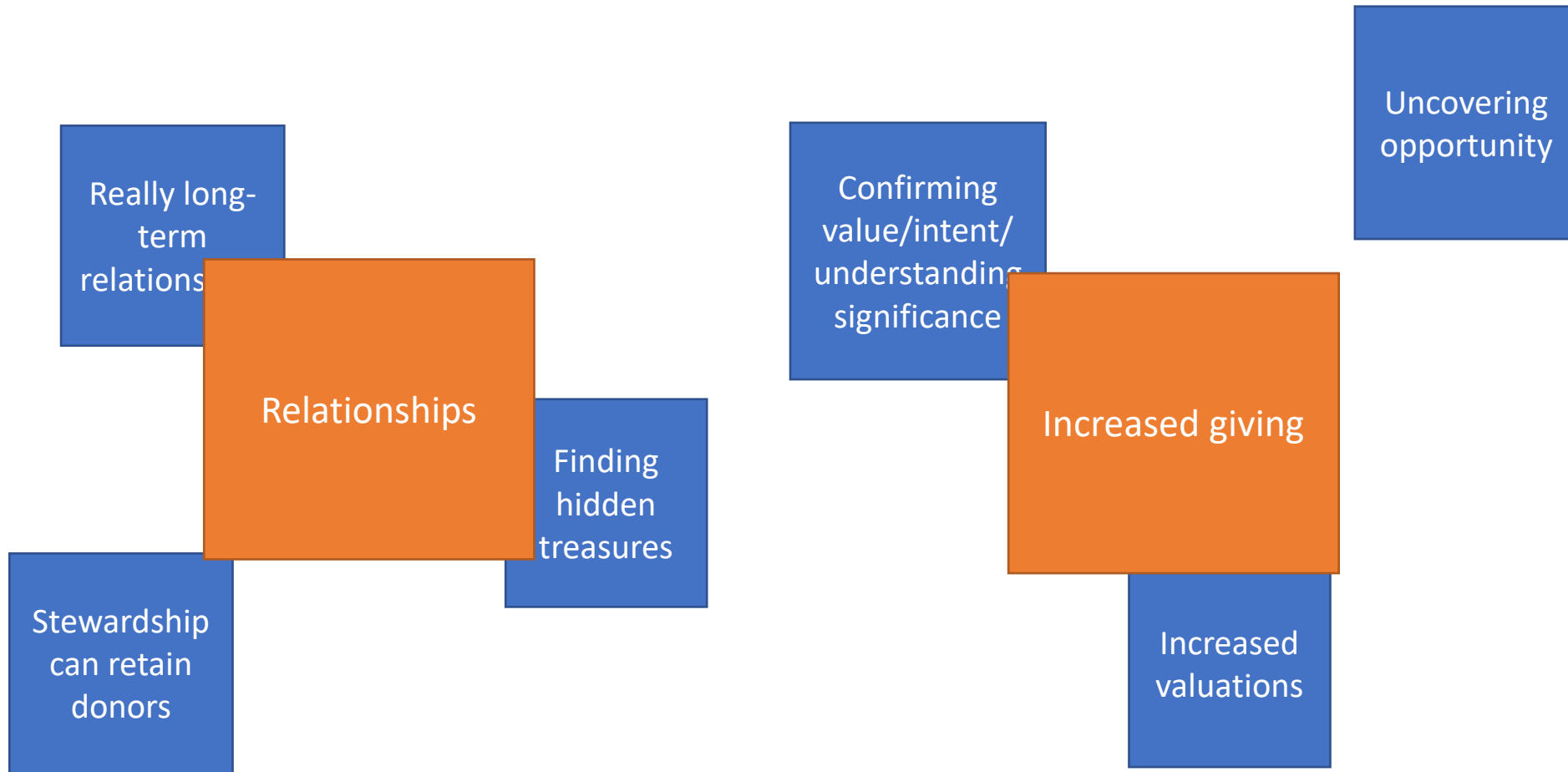
Finding hidden treasures

Confirming value/intent/understanding significance

Increased valuations

Uncovering opportunity

What are some successes you've encountered?



How do you feel about our approach to planned giving stewardship?

Overwhelmed

I don't understand what we're actually doing

Diffused throughout organization

chaotic

Quality control issues

Where do we even start?

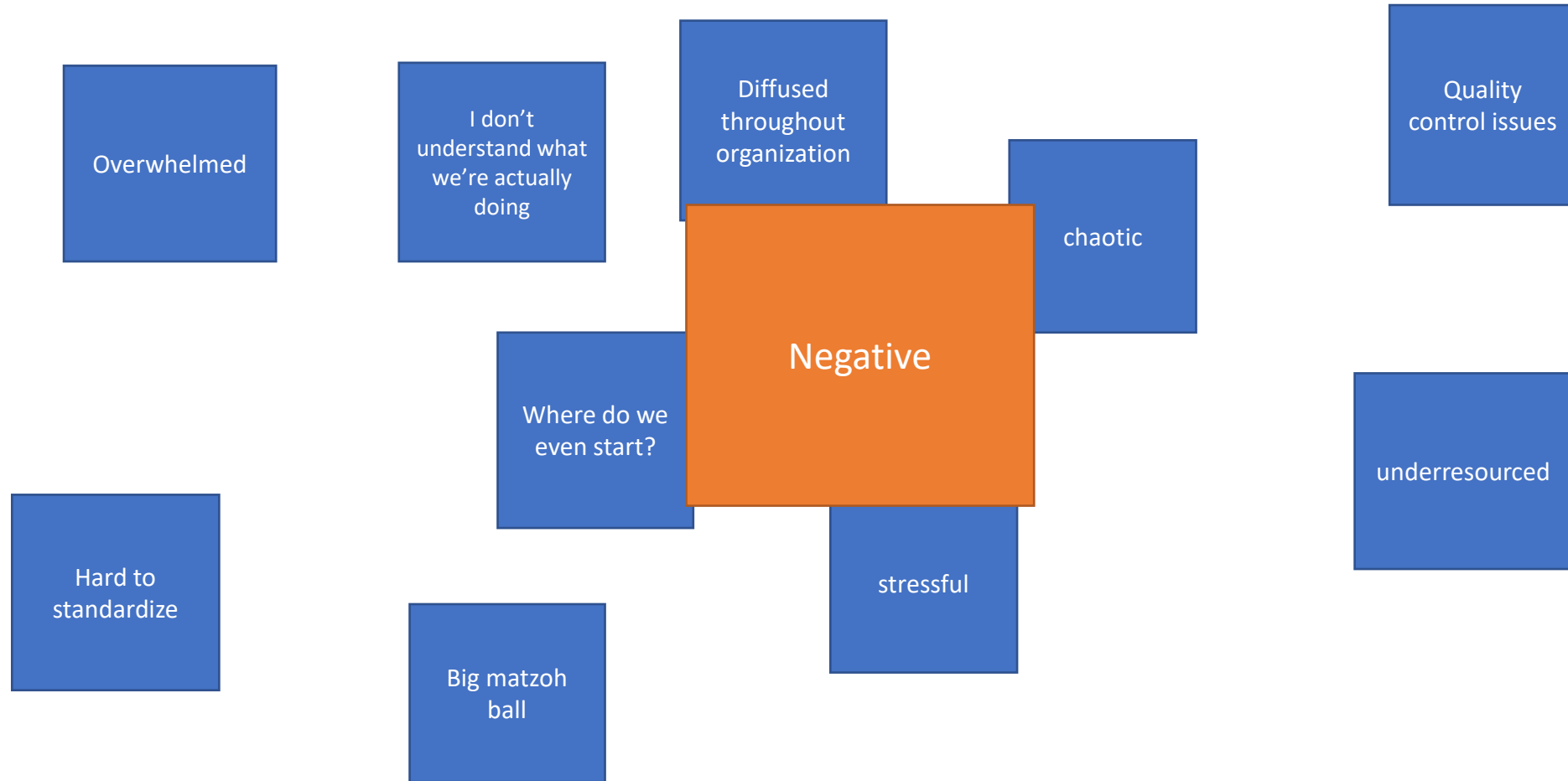
underresourced

Hard to standardize

stressful

Big matzoh ball

How do you feel about our approach to planned giving stewardship?



What might happen if we do nothing?

Leave money on the table

Reduced likelihood for increased giving

Losing goodwill

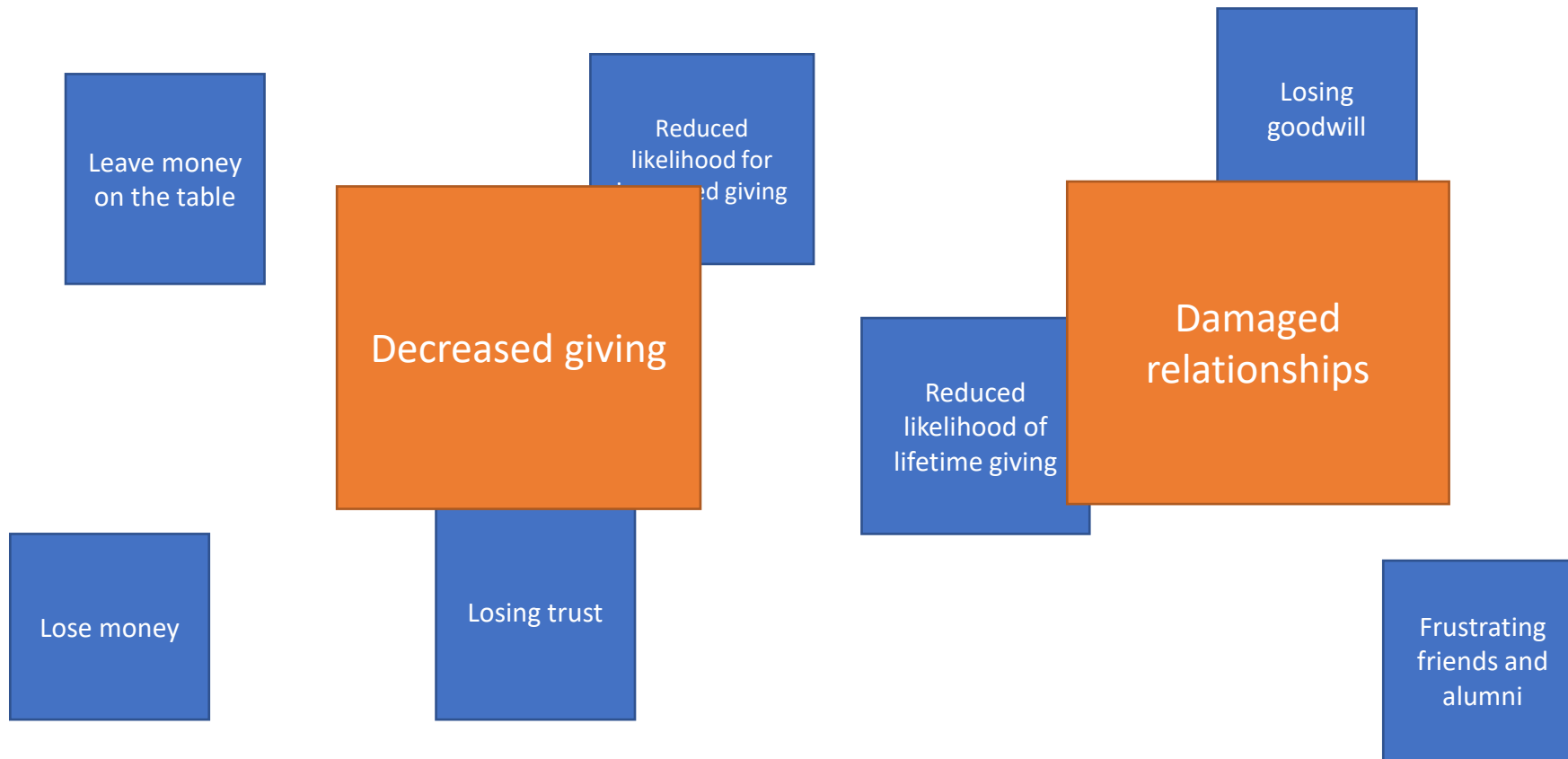
Reduced likelihood of lifetime giving

Lose money

Losing trust

Frustrating friends and alumni

What might happen if we do nothing?



If we had infinite resources, what could this look like?

Someone to manage relationship at every stage

Planned gift concierge

Annual visits for everyone!

Customized report of future impact

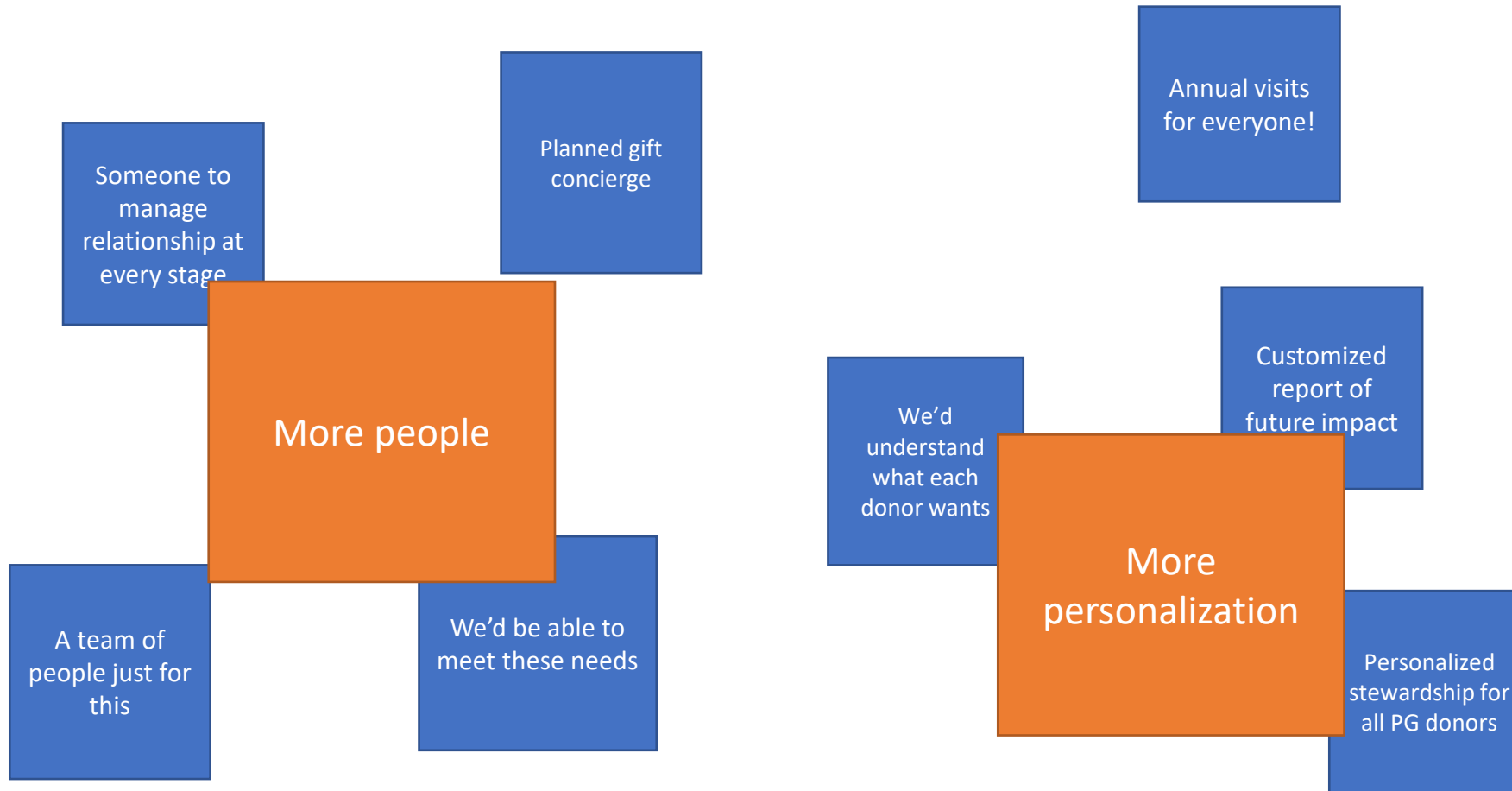
We'd understand what each donor wants

A team of people just for this

We'd be able to meet these needs

Personalized stewardship for all PG donors

If we had infinite resources, what could this look like?



Let's try it!

Rules of Brainstorming



Defer Judgment



One Conversation at a Time



Encourage Wild Ideas



Be Visual



Build on the Ideas of Others



Go for Quantity



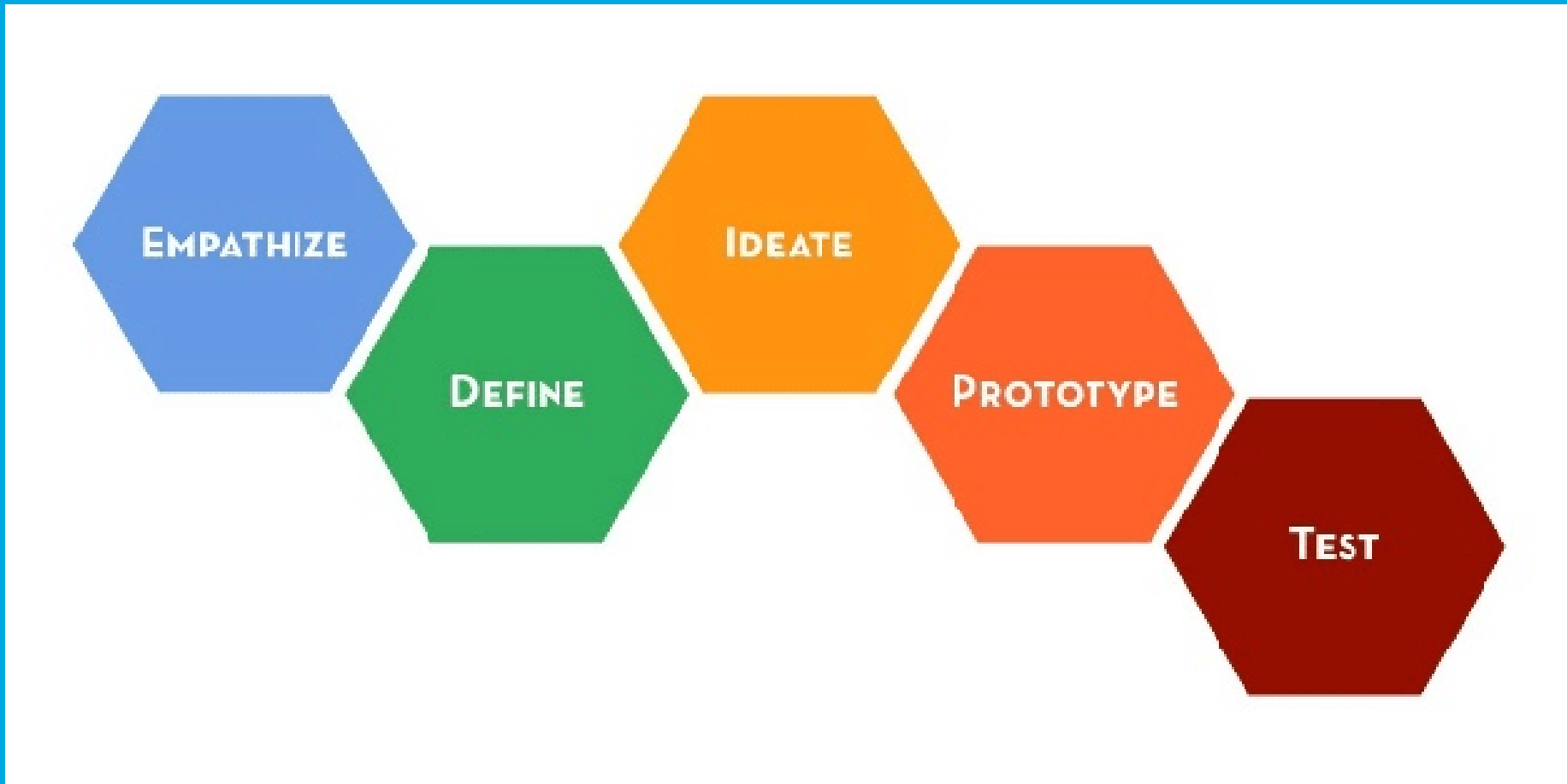
Stay Focused on the Topic

What's a common SDR problem in your shop?

1. What are some barriers and pain points you've experienced?
2. What are some successes you've encountered?
3. How do you feel about your approach?
4. What might happen if you did nothing?
5. If you had infinite resources, what could this look like?

Back to our
problem...

Design Thinking



How might we...?

- "How Might We" (HMW) statements are small but mighty questions that allow us to **reframe our insights into opportunity areas** and innovate on problems found during initial research.
- They are a rewording of the core need, which you have uncovered through initial research and **help teams focus on user needs and problems, rather than just jumping straight to solutions**. These statements help inspire the design!

Our guiding “How Might We” statements:

- How might we eliminate confusion and administrative burden to improve communication with planned gift donors?
- How might we continue to strategically advance relationships so as to leave the door open for increased lifetime and future giving?
- How might we build confidence within our team through the development of resources to support planned giving stewardship?
- How might we build trust through planned giving stewardship?
- How might we leverage existing resources and build new

With these principles guiding us, we were able to:

- Identify internal resources needed to clearly define roles in planned giving stewardship for SDR, MGOs, and leadership
- Create standardized stewardship plans in our CRM to properly track current and plan for future engagement
- Design resources for use in qualification, travel, and stewardship to empower MGOs to collaborate
- Launch a new communications plan specifically targeted at planned giving donors
- Build a process for annual plan strategy review and stackable customizations, so that our program could evolve over time

The program we
designed.

A marriage of SDR + MGOs + Operations:

SDR

- Impact reporting
- CRM plans

MGOs

- Relationship management
- Outreach

Operations

- Research
- Travel Lists
- Communications
- Internal Resources

Which supported our collaborative work by:

- Allowing us to customize stewardship plans for planned givers at appropriate levels
- Ensuring all planned givers were receiving one impact report + one personal outreach touchpoint at least biannually
- Creating a system for tracking all of this in a consistent manner in our CRM
- Empowering MGOs to employ SDR best practices in their work

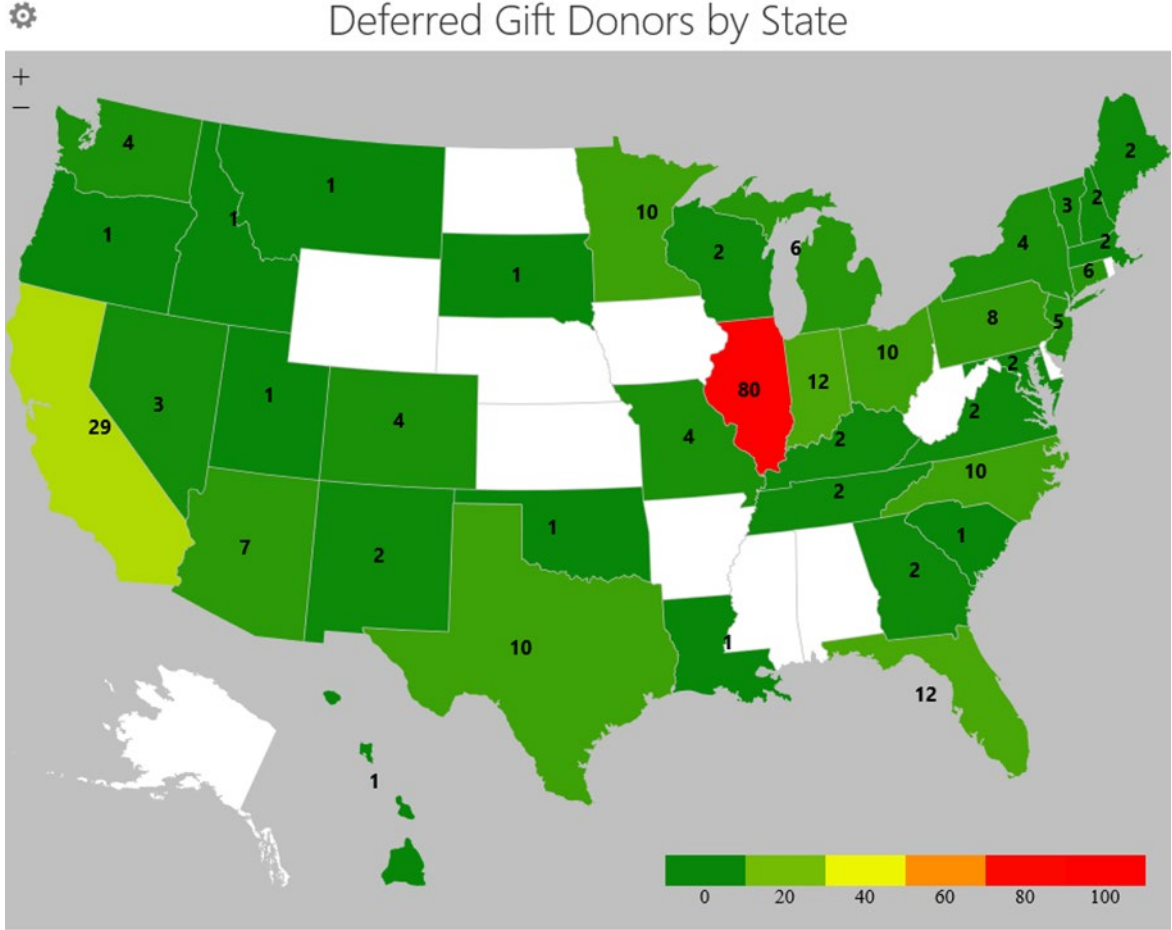
In other words, a program that is:

- Proactive
- Consistent
- Collaborative
- Creative

Program elements:

- Toolkit
- Travel list and heat map
- Process for keeping data updated
- Process for annual strategy reviews
- Guidelines for custom outreach touchpoints
- Impact report

Deferred Gifts Heat Map



FY23 Deferred Giving Impact Report



Arlys Streitmatter Conrad Endowment FOR THE COLLEGE OF LAS

Passion for education leads to powerful impact

Education was a pillar of Arlys Streitmatter Conrad (BS, '44, education), the daughter of a teacher-central Illinois farmer, grew up with a love of learning. A first-generation college student, she received a four-year scholarship to attend the University of Illinois. A first-year college student, she received a four-year scholarship to attend the University of Illinois. After retiring from a career that included stints with I Airport and Booz, Allen & Hamilton as well as 38 with S&C Electric Company in Chicago, she turned her attention to overseeing the management of her family's centennial farm near Peoria.

Her relationship with the University of Illinois remained deeply important to Conrad. She was a proud member of the University of Illinois Foundation and enjoyed her association with many Illinois presidents and Foundation board members.

Lynette Marshall, a former fundraiser for the University of Illinois, was a longtime friend of Conrad. They became acquainted in December 1983 when Marshall began her job as director of resource development for the College of Agricultural, Consumer, and Environmental Sciences at Illinois. Conrad wrote Marshall a letter and introduced herself. It was then they learned they were from the same rural Illinois community.

"That outreach began a relationship that endured for the rest of her life, and we enjoyed corresponding (sometimes I would hear from her on a weekly basis), meeting in Champaign when she was on campus, or in her home in Chicago," Marshall said. "We understood one

another's family histories, and I was able to help Arlys accomplish what she wanted to achieve philanthropically at her alma mater."

Conrad had two goals at Illinois: to help students who were interested in studying English—honoring her mother's role as a teacher in a one-room schoolhouse—and to help young people who wanted to have a career in production agriculture—honoring her father's vocation as a farmer.

Conrad made her first gift to UIDC in 1968 and established the Arlys Streitmatter Conrad Endowment Fund in 1996. Though she had been a steadfast supporter of the university throughout her lifetime, her legacy was secured when her estate commitment of more than \$12 million was realized after her passing on Sept. 6, 2007. Her planned gift commitment provides recurring, unrestricted support to both the College of LAS and the College of ACES as they work to address their most pressing priorities.

Since the endowment fund was established, it has supported 64 Conrad Professorial Scholars, who are outstanding LAS humanities professors. Selected professors receive financial support for their research and teaching.

Conrad's mother was a strict grammarian, and she felt supporting students in English would most appropriately honor her mother, Marshall said. For this reason, the fund provides two significant scholarships to outstanding students in English. In addition, the fund has supported a wide variety of LAS efforts that advance people, programs, and spaces, including international programs, first-year experience, and lab renovations.

"It was my honor to deliver the eulogy at her funeral service, representing both our home community of Speer as well as our shared university of choice," Marshall said.

ARLYS STREITMATTER CONRAD ENDOWMENT

Empowering students & scholars

Support for scholarship

Established in honor of her mother's passion for teaching, the E. Veda Streitmatter and Arlys Streitmatter Conrad Scholarship in English supports promising students pursuing English education from downstate Illinois.



"All my teaching expenses, including content exam, candidate observer, and b expenses, as well as living expenses, are covered by this scholarship. Not having to look making it through the school year looking for employment has been so wonderful."

» **Naja Taylor**, a senior English, secondary education major
Career goal: High school English/English as a second language teacher



"Receiving this scholarship was one of my proudest moments here as a student at the University of Illinois. Because of the Conrad Scholarship, the time I'd previously spent dreading my next tuition payment has now been transformed into a heightened sense of focus, purpose, and what we in the Marching Illini call an 'Attitude of Gratitude.' Gratitude for the time when I've been able to become enveloped more in my studies instead of the state of my bank account; gratitude that my parents are free to start focusing on my little sister's upcoming college education instead of mine; and gratitude for the feeling that such a large university has personally invested its resources into the things I can create. That's how the Conrad Scholarship has made me feel as a student now—who knows what ripple-effect opportunities it will create and how it'll make me feel long down the road."

» **Gabe Lareau**, a junior English major
Career goal: Writer/Educational media/sustainability

Conrad Humanities Scholars

The 64 current and former Conrad Humanities Scholars are among our College's most accomplished, chairing departments, securing prestigious fellowships, leading graduate programs, and winning competitive awards.



"The Conrad Scholar appointment has given me the resources a historian at a research institution needs to conduct serious, extensive research. Without the scholarship's semester of teaching leave and research funds, I would not be able to complete my current project, which requires me to travel to multiple archives."

» **Professor Ikuko Asaka**
Department of History
Conrad Professorial Scholar, 2021-2026

FY23 Deferred Giving Impact Report

In pursuit of happiness & philanthropy DR. CRAIG BASKIN



Planned gift to support Department of Chemistry

Alumnus Craig Baskin (BS, '73, chemistry) made a significant career change after asking himself a simple but bold question: "What will make me happy?"

"Most people never ask themselves this question," he said.

After taking an inventory of interests and passions, Baskin swerved from industrial chemistry to the investment business.

"It's always a challenge when you make a change because you're not sure if you're making a change for the right reason or because the grass is greener on the other side or because the grass really is greener," he said. "There is a risk, and I was so happy I made the choice. That led to a long, successful career."

Changing course has been a theme for Baskin as an undergraduate student entering Illinois in 1960, he intended to enroll as a physics major, however, he became a chemistry student following a semester studying finance.

"I had a wonderful time in Champaign," he said.

"It was intellectually stimulating. Almost without exception, my professors were outstanding, and I always found their doors open if you needed to ask a question. I don't think I could have had a better undergraduate experience than what I had in Champaign at that time."

After graduating from Illinois, Baskin earned his PhD at University of California, Berkeley. He then launched his career as an industrial chemist before pivoting to investing.

"I don't think I would have been nearly as successful without having the background as a chemist," he explained. "I think all physical scientists are problem solvers, and to make an investment you're trying to solve a problem."

Baskin built his career in Boston and in 2020 moved back to Chicago where he grew up. Now retired for 13 years, he is an avid traveler, studies French, and enjoys cooking.

"I'm very fortunate," Baskin said. "By one measure of success I earned money, but I've also been happy. With my estate plan, I wanted to do something that would have lasting benefits. When you touch a student's path, you touch every person they interact with, and it goes on to the next generation."

Baskin's gift will support undergraduate scholarships, faculty scholars, as well as the Chemistry Discovery Fund. Given his own willingness to strike out on a new path, it's unsurprising that Baskin is particularly passionate about the Discovery Fund. While working toward his PhD, Baskin crossed paths with an organic chemistry professor who was ready to dive into a new research area.

"He applied to several grant funds but never received funding because he had no history in the area of research," Baskin said. "He taught, but he was out of the research game at that point. There has to be a way to fund people with ideas that are out of consensus, because consensus isn't always right. I felt this is a way I could support that idea. This fund could allow researchers to bring new ideas to an inflection point—if the results are positive, additional funding is likely."

DONOR FEATURE: DR. CRAIG BASKIN

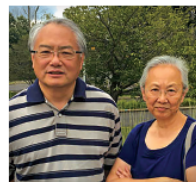


"When you touch a student's path, you touch every person they interact with, and it goes on to the next generation."



Chemistry Discovery Fund

The Chemistry Discovery Fund gives Department of Chemistry faculty members overhead-free grants to explore novel ideas and launch innovative projects. The fund is supported in part by alumni Ving and May Lee, who received their PhD degrees in chemistry in 1975 and 1976, respectively, and went on to successful careers in the pharmaceutical industry.



"For me, the fund is to encourage and foster pioneering research, that ultimately contributes toward building and maintaining the department to be recognized as the very best in the country."

» **May Lee**
MS, '74; PhD, '76; chemistry

"I am a firm believer that academic discoveries need paths to monetization, some earlier versus later. As Illinois has a rich history in converting academic discoveries to practical applications, it is a pleasure to provide financial support for such opportunities."

» **Ving Lee**
MS, '73; PhD, '75; chemistry



"During the funded period, we strides at developing the niche platform to showcase the clinical peptides. The flexibility afforded Fund allowed us to quickly pivot in I am grateful to have been a recipient."

» **Douglas Mitchell**
John Witt Professor in Chemistry
Department of Chemistry
Chemistry Discovery Fund recipient

Custom Lasso Peptides for Detection Negative Pathogens: In this project, I set out to provide physicians with a fast, economical way to identify and target pathogens when prescribing antibiotics.

THANK YOU

Your support empowers our students and faculty, drives discovery and innovation, and creates a lasting impact on the College of LAS and the world.

OFFICE OF ADVANCEMENT
las.illinois.edu/giving

Results!

- Overwhelmingly positive response from donors about impact report
- Increase in deferred revenue from re-engaged donors in FY23
- Improved use of travel time for MGOs
- SDR much more involved in solicitation cycle
- Helps with long-term strategic planning

Results!

- Higher creative confidence – we've continued to use brainstorm sessions and design thinking to solve wicked problems!
- Greatly improved visibility into work between MGOs and SDR
- More comfort with collaboration
- Less chaos – more trust

Takeaways

- Ask “why?”
- Keep your creative toolset sharp!
- Invest in building professional empathy with those on your team
- Look for ways to turn your problems into opportunities
- Work with what you’ve got

Questions?

Thank you!

Kendra Wieneke | LAS @ Illinois | kwieneke@illinois.edu