

Midwest Regional Forum

A Practical Toolkit for Stewarding Top Donors

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Northwestern University

Tools for Stewarding Top Donors

- Individual Stewardship Plans
- Donor Audit
- Next Steps Reports

Individual Stewardship Plans

Who are they for?

- Top donors, closest to your organization
- Those who need a more personalized look

Purpose

- Create specified stewardship touches
- Helps in long term planning

Tools Needed

- Info from your database
- Intel from Gift Officers
- Gift Agreements

Stewardship Plan

Mr. John Doe #87255 ('46 Trustee)
Mrs. Jane Doe #138882 (Trustee SP)
Prospect ID: 91264

Last updated: March 07, 2016

Strategy:

Solicit for \$10M in 2016 for research at McCormick. Solicit in FY18 for \$10M in support of WCAS.

Prospect Manager: Mr. Robert E. McQuinn

Giving Overview:

Total giving to Northwestern: \$25,514,621.90

Principal and Major Gifts of Note:

Weinberg Coll of Arts & Sciences
Doe Studies
January 23, 2008
\$5,000,000.00

Weinberg Coll of Arts & Sciences
Doe Fund
October 16, 2012
\$2,000,000.00

Weinberg Coll of Arts & Sciences
Doe Fund
March 11, 2014
\$1,200,000.00

Weinberg Coll of Arts & Sciences
Doe Fund
March 03, 2015
\$1,000,000.00

Next Solicitation Date:

McCormick
May 01, 2016
\$10,000,000.00
1 more proposal(s) with future solicitation date(s) in CX

Recent Stewardship Actions:

Report Type: Correspondence
Description: Bob sent CYE mailing
Author: Mr. Robert E. McQuinn
Date: January 25, 2016
See OnBase for details.

Report Type: Correspondence
Description: John is satisfied with McCormick/Doe Center course.
Author: Dr. J. M. Ottino
Date: November 12, 2015
John to Dean Ottino, "Thank you for your letter of October 30. I am delighted about your plans to develop a course around the serious problems of water scarcity..."
See Onbase for full text

Report Type: Correspondence
Description: Dean Ottino sent summer book mailing
Author: Dr. J. M. Ottino
Date: July 31, 2015

Current and Future Stewardship Actions:

Date: December 01, 2016
Program: Weinberg
Owner: Ms. Suzanne Reynolds Joyce
Task: John and Jane will receive an endowed fund report on: Doe Professorship

Date: August 01, 2017
Program:
Owner: Ms. Rebekah Holmes Nowak
Task: 2017 is the 5 year anniversary of the Doe Fund.

Milestones:

Self	John Doe (06/07/1925); 95th birthday in 2020
Self	John Doe (1946); 70th MCC reunion in 2016
Spouse	Jane Doe (02/26/1929); 90th birthday in 2019
Child	Susan Doe (05/14/1958); 60th birthday in 2018
Child	James Doe (06/25/1953); 65th birthday in 2018
Child	A. Doe (01/18/1952); 65th birthday in 2017
Child	Janet Doe (10/04/1963); 55th birthday in 2018
Child	Sara Doe (04/01/1960); 60th birthday in 2020
Child	Janet Doe (1993); 25th MDL reunion in 2018
Cousin	Iris Doe (08/13/1945); 75th birthday in 2020

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5 year anniversary of
building dedication



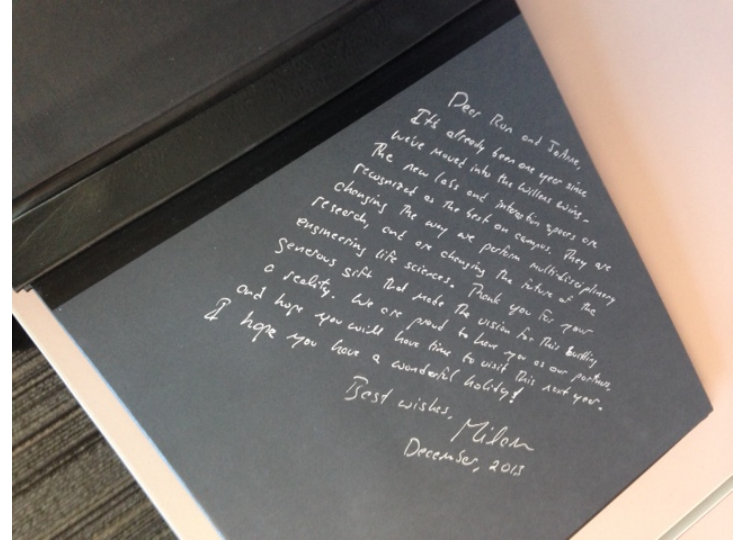
One year anniversary of
milestone gift



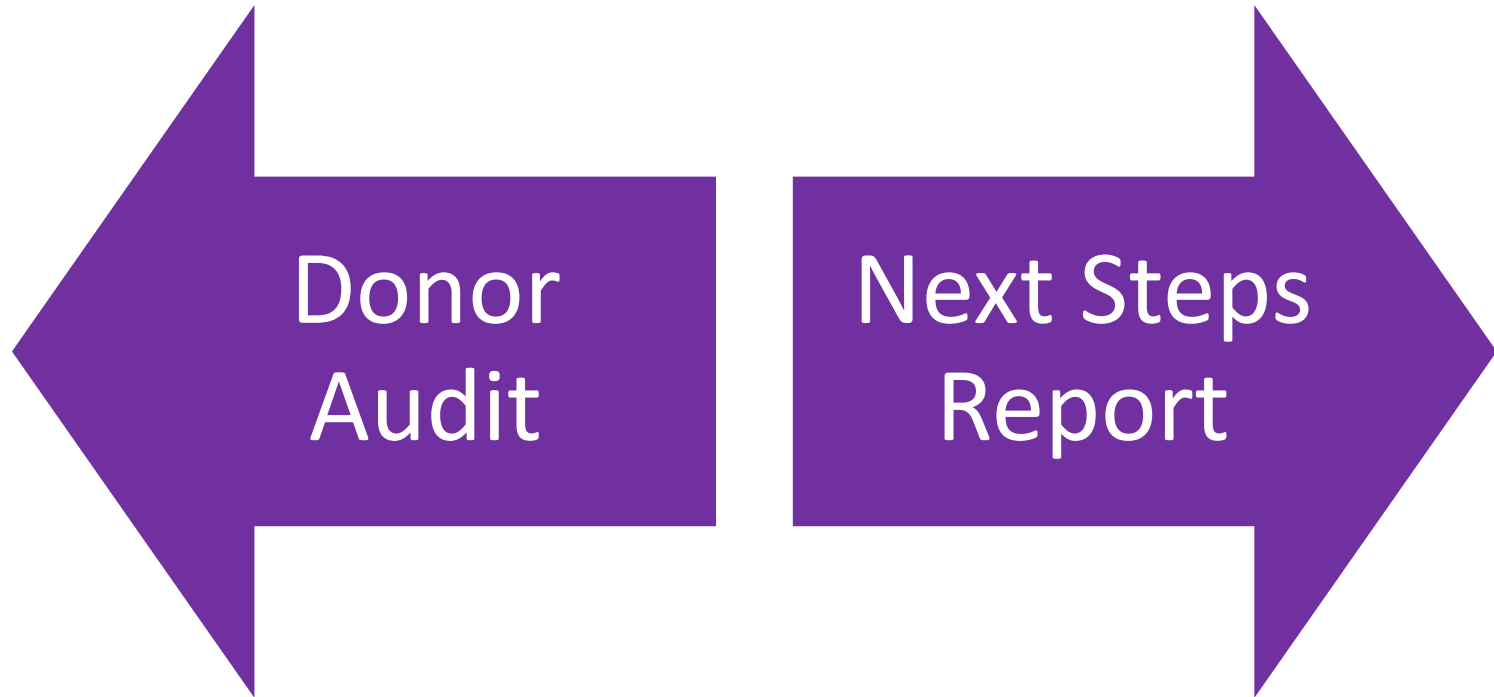
Milestone birthdays

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One Year Anniversary



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Donor	President	Trustees	VP, Deans, Sr Staff	Other	Grand Total	
Willie Wildcat		10		51	33	95
Contact Report		8		26	11	45
Attempted Contact					1	1
Correspondence		5		9	1	15
E-Mail		2		6	6	14
Event		1		2		3
Phone				5		5
Visit				4	3	7
Event					22	22
Breakfast					1	1
Brunch					1	1
Campaign					3	3
Dinner					8	8
Luncheon					2	2
Pre-Game Gathering					5	5
Tailgate Party					2	2
Note		2		25	1	28
General Information				19	1	20
Holiday Gift / Card		1		3		4
News				1		1
Stewardship Gift		1		2		3

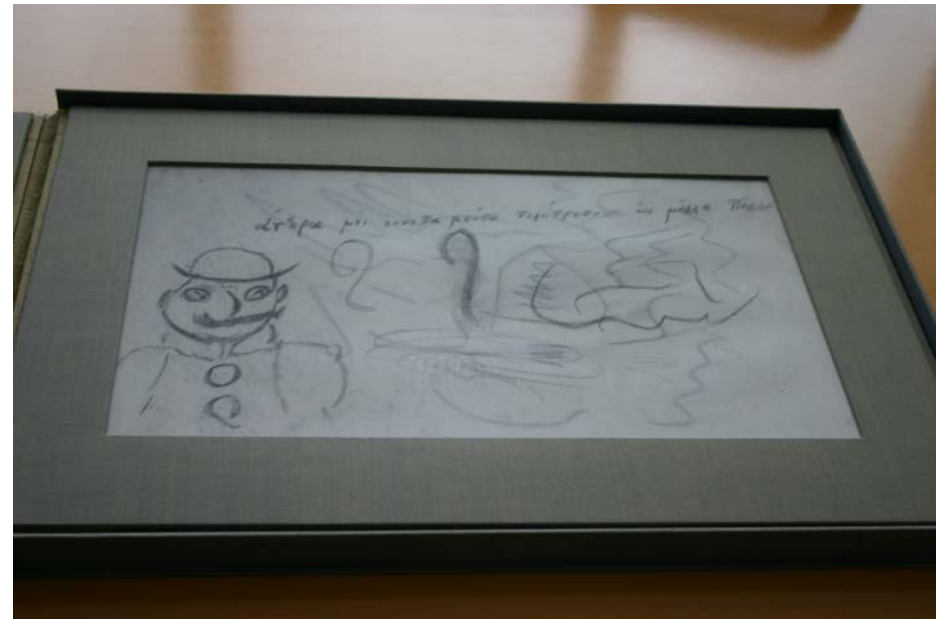
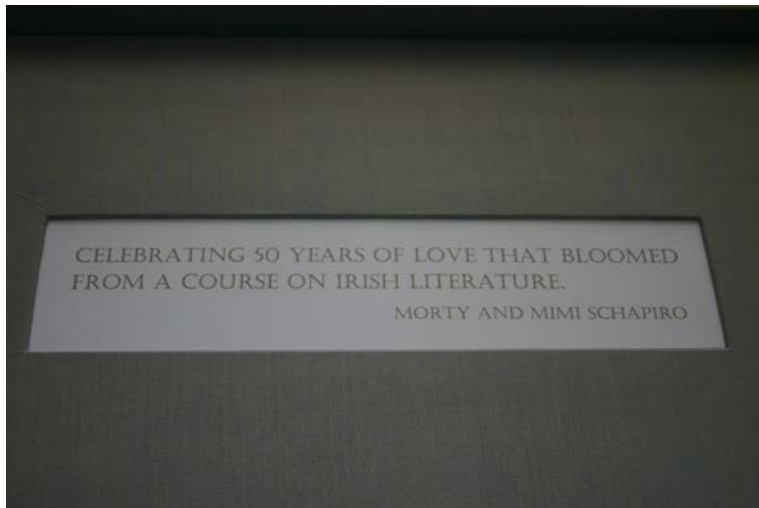
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Prospect Name	Next 60 days	Next 61 to 180 days	Next 181 to 730 days	Last President contact	President touches last 90 days
Willie Wildcat	09/01/15: Anticipated stewardship visit from FSM staff member. 09/01/15: Anticipated stewardship visit from FSM staff member in the Fall.	12/01/15: Willie will receive an endowed fund report on: Wildcat Fund for WCAS Biomedical Research	12/01/16: Willie will receive an endowed fund report on: Wildcat Fund for WCAS Biomedical Research 01/09/17: 2017 is the 15th anniversary of the Willie Wildcat Auditorium at the Lurie Medical Research Center. 03/01/17: 15th Anniversary of the Willie Wildcat atrium at the Medical Research Center.	05/22/15 - Sent NULC President's Book Club Selection	1
Willa Wildcat		12/01/15: Willa to receive an endowed fund report on: Wildcat Chair; Wildcat Center;	03/01/16: Willa to receive Scholarship thank you letter report on: Scholarship Fund - Athletics and Scholarship Fund - School of Speech 12/01/16: Willa to receive an endowed fund report on: Wilcat Chair; Wildcat Center 12/12/16: Willa's 85th birthday on January 12, 2017. 03/01/17: Willa to receive Scholarship thank you letter report on: Scholarship Fund - Athletics and Scholarship Fund - School of Speech	05/22/15 - Sent NULC President's Book Club Selection	1

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50th Wedding Anniversary

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Upcoming campus visit

Jokester Gary Marshall, Daily sports editor, keeps feature editor Mary Evans' mind from her work with a humorous anecdote.

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Benefits

Planning

Compliance

Challenges

Blind spots

Cross
department
buy in

Questions? Comments?

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