



How to Conduct a Stewardship/Donor Relations Audit (Tune-Up)

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Why conduct a stewardship or donor relations tune-up? Pipeline and retention are at stake!

Definitions:

1. Stewardship – an action triggered by a donation (transactional in nature)
2. Donor Relations – all interactions with donors related to philanthropy (gift acceptance, acknowledgment, recognition, reporting)
3. ***Kay's definition of donor relations: any and all organizational programs, patterns and habits affecting donor experience and behavior***

Identify:

1. **Possible donor relations programs** (even the ones fundraising doesn't "own"):

Dinners	Thank you calls	Videos
Receptions	New donor kits	Phone calls
Alumni chapter events	Faculty lectures	Parking
Salons	Donor appreciation day	Insider access
Acknowledgements	Thank you Facebook post	Mentorship programs
Endowment reporting	Art openings	Facility tours
Giving societies	Loyalty donor recognition	Volunteering
Scholar meet & greet	Honor rolls/recognition	Committee service
Sporting events	Memorial/congratulations	Online giving
Impact reports	letters	Donor
Graduation	Stewardship plans	appointments/concierge
Reunions	Receipts	programs
Fast recognition	Gift agreements	Board recognition
Student performances	Students notes of thanks	Building dedications
Ribbon cuttings	Thank you gifts	Cumulative giving
Homecoming	Plaques and signage	programs
Database maintenance	Magazines/publications	Planned giving
Birthday cards	Parking	stewardship

2. Donor behaviors/experiences influenced:

Engagement	Annual giving	Prospect identification
Entitlement	Pipeline movement	Passion
Feedback	Internships	Matching gifts
Give again	Trust & connection	Event attendance
Pledge fulfillment	Bringing problems to forefront	Mentor
Loyalty & advocacy	Volunteering/committee service	Social media activity
Generational giving	Monthly giving	Re-engagement
Referrals (students/patients)	Coming "home"	General donor feelings
Planned giving	Payroll giving	Job interviews/candidate referrals
Word of mouth	Pride	
Relationship building		

3. Criteria to prioritize programs for tune-up:

Resources used or impacted:

Staffing
 Funding
 Information
 Time
 Talent
 Systems support/technology
 Internal processes
 Advocates, champions & enemies
 Partnerships & alliances
 Political capital

Other types of management criteria:

Sustainability	Organizational capacity ("can we do it")
Impact/value added	Type of win? (quick, easy, big, short-term, long-term, etc.)
Urgency	Simple/hard to improve
Leadership/organizational priorities	Consequences of changing or stopping
Donor giving level	Who "owns" the program?
Efficacy	How do you define success?
Metrics & goals	Cultural acceptance
Departmental disconnect	Departmental disconnect?



4. Example: program/criteria matrix for comparison and deciding where to start

Criteria → Program ↓	Departmental Disconnect	Metrics & Goals	Systems Support/technology	Number of donors touched
Receipts	IT owns it, we have a good relationship with them	Struggle to meet 48-hour turnaround goal	New CRM/database will be in place within 90 days	ALL
Gift Agreements	Major giving owns this and they will work with us	No metrics/goals in place	Produced one-off using document template	Few, but they are top-tier donors

What's next for you?

1. Work the process alone or with colleagues
2. Go through the steps in order, then build your matrix

Have any questions or need help? Contact Kay Coughlin, Kay@DonorRelationsMindset.com or 216-533-4774