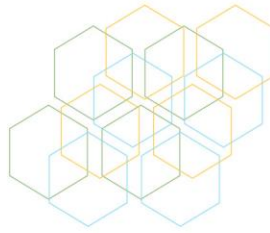


the CAMPAIGN *for* UAB

GIVE SOMETHING | CHANGE EVERYTHING



Common Practices

What Works, What Doesn't, and
What Barely Gets You By

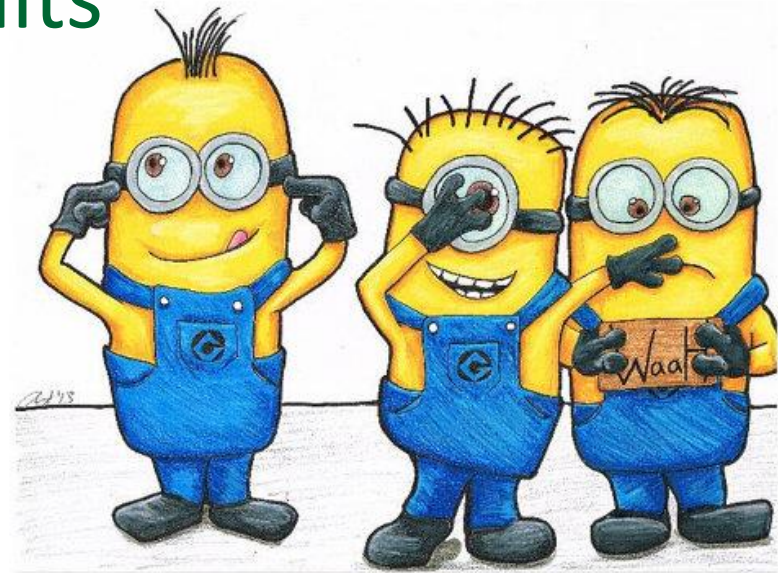
Daphne B. Powell

Senior Director of Stewardship and Donor Relations



Agenda

- Review the five elements of DR
- Pick Them Apart – One by One
- Review Survey Results
- Talk Dirty
- Get Real





Five Elements of Donor Relations

- Gift Acceptance
- Gift Management
- Acknowledgement
- Recognition
- Reporting

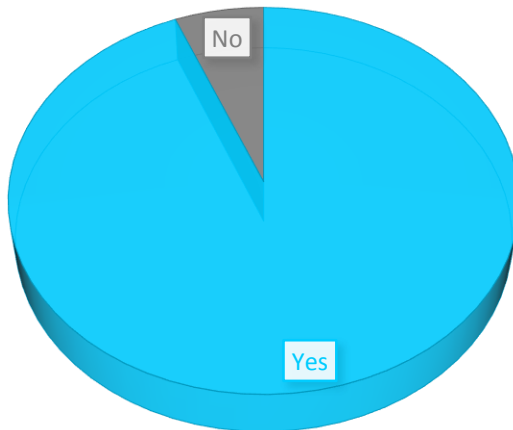




Gift Acceptance

Works	Doesn't	Barely
Allowing gifts of all forms	Refusing Complicated Gifts	Cash, checks, credit cards
Working with donors and financial advisors	No Gift Designations	Must be online now
Allowing donor restrictions	No Gift Restrictions	
Review Committee for Complicated Gifts		

DONOR RESTRICTIONS ALLOWED



94% of survey respondents allow donors to place restrictions on their gifts.

Only 6% do not allow donor restrictions.



Gift Acceptance





Gift Management

Works	Doesn't	Barely
Restricted Accounts	Commingling Restricted Funds	Spreadsheet Tracking
Governing Document(s)	Unallowable Expenditures	No Just-Getting-By Here
Shared Responsibility	Unused balances	

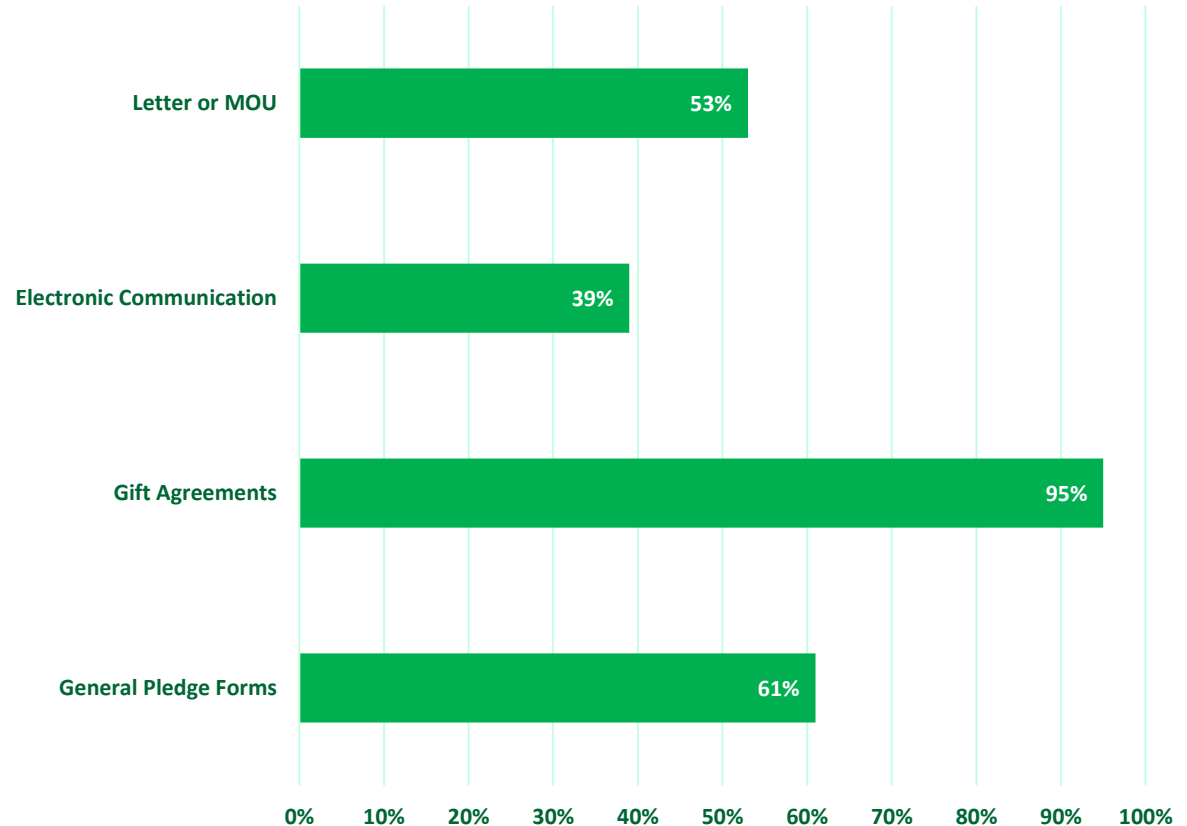
Documenting donor intentions is critical to ensuring appropriate use and ultimately the long-term relationship with donors.



Gift Documentation

Comments:

- Pledge form standard for all
- Letters of Intent = Gift Agreements
- Gift Agreements reserved for naming opportunities
- All of the above and/or an email if need be
- Signed and notarized pledge forms for naming ops





Gift Management

DISCUSSION



Acknowledgement

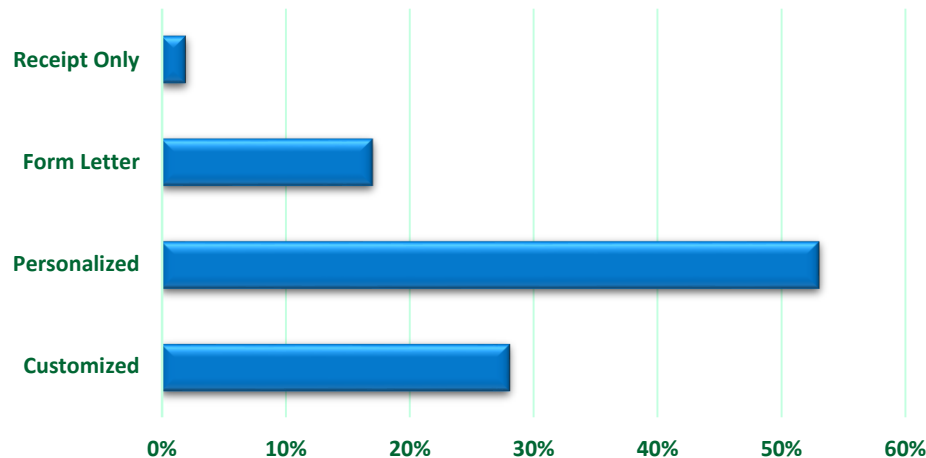
Works	Doesn't	Barely
Sincere and Meaningful	Impersonal Form Letter	Personalized Form Letter
Tiered Approach	THASK	Receipt Only
Leadership Phone Calls		

- Donors say the acknowledgement *IS* the recognition.
- From the *Burk Donor Survey*,
 - 40% of respondents said they had received at least one thank-you letter in recent memory that they would describe as exceptional. Its *warm, personal tone making the letter feel like it was written just for me* was cited most often.
 - 45% of donors said it was an outstanding thank-you letter that inspired them to give again.
 - 23% said they gave more generously because of the quality of the acknowledgement they received.

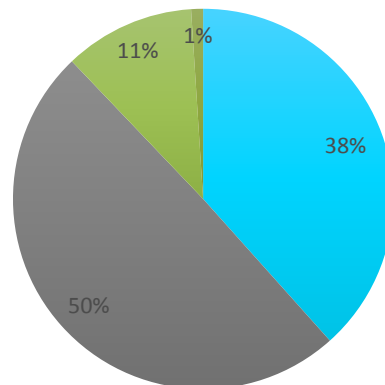


Acknowledgement

Letter Style



Turnaround Time

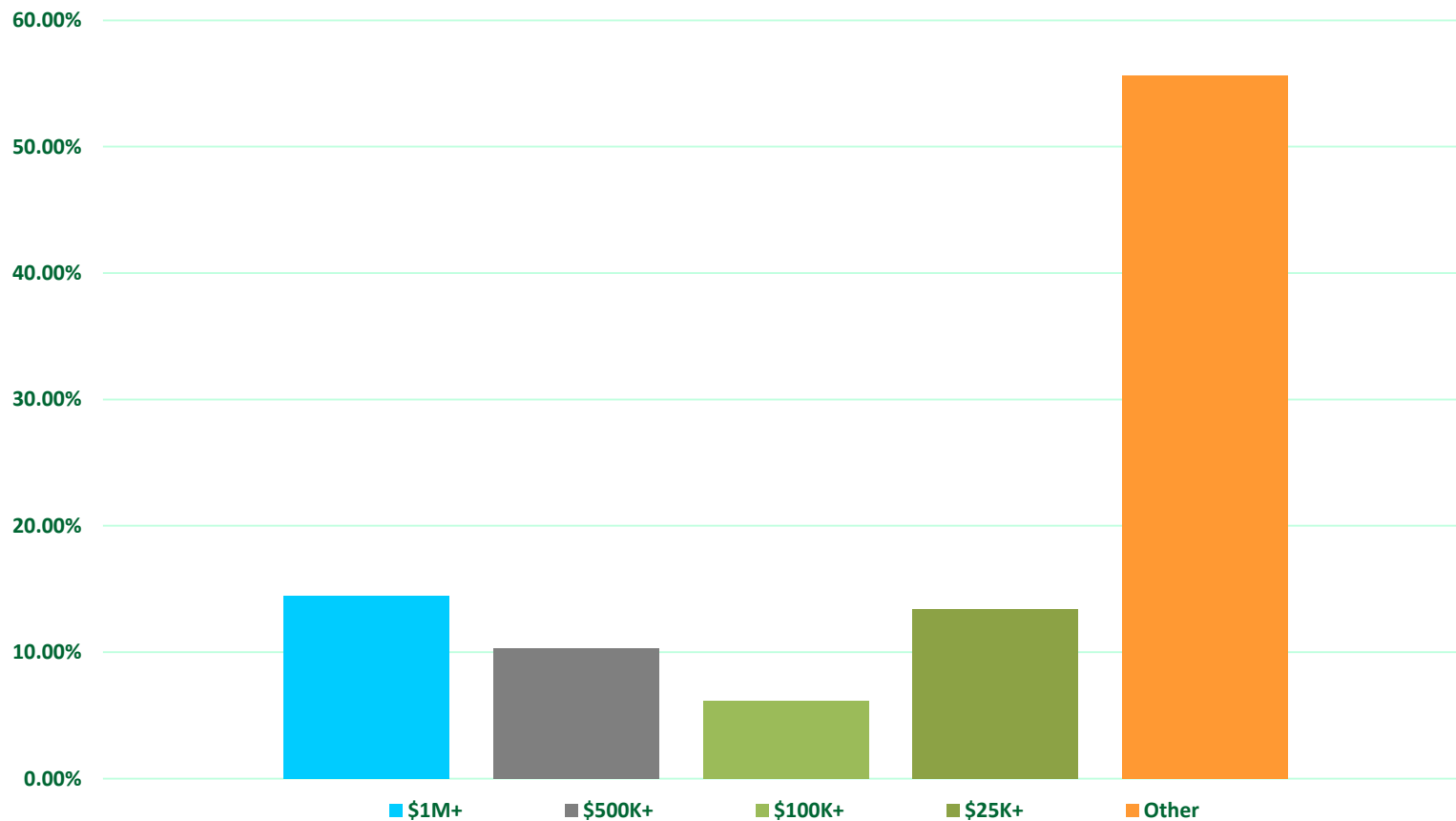


■ 1-2 Days ■ 1-2 Weeks ■ Less than one month ■ One month or longer



Acknowledgement

Leadership Phone Calls





Phone Call Comments

- Not using
- Leaders' Discretion
- Determined by DOs (based on moves)
- Some reserve for \$25M
- Some start at \$250K, \$50K or \$10K
- Some start at \$500 or \$1K
- Random based on relationship
- When pledge is fulfilled
- Not systemized or leadership failed to participate
- Donors of \$750 get a student call





Acknowledgement



Let's hear from you!



Recognition

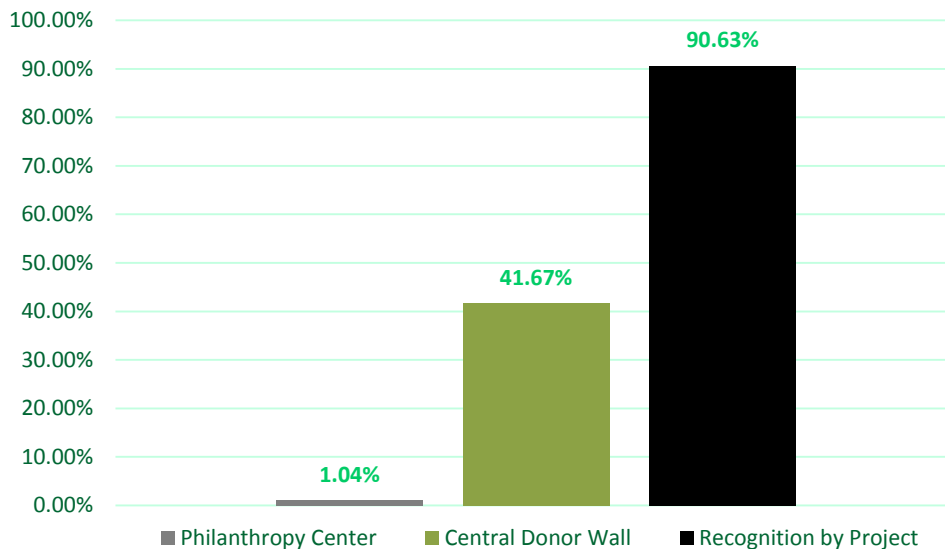
Works	Doesn't	Barely
Sincere and Meaningful	Inaction	Document the Why
Insider Access/Info	Too Many Tchotchkes	Share the Story
Donor-Centered Approach	Honor Roll	
Measurable Results		

- People will forget what you said; people will forget what you did; but people will never forget how you made them feel. –Maya Angelou



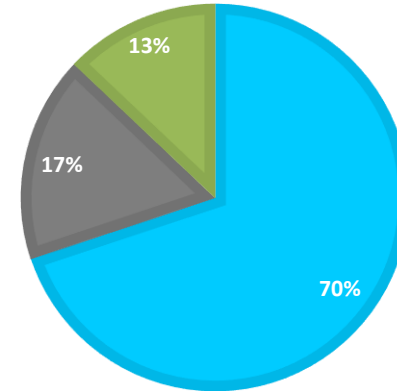
Comments:
Donor walls within units
Website, annual report, sponsorship media

Recognition Type



GIFT SOCIETY STRUCTURE

■ Organization-wide ■ By Focus Areas ■ No Gift Societies



Comments:
Trying to do away with them!
(Keeping PG and AG)
Organization-wide and unit specific
Central handles cumulative and PG,
while DOs handle deans
One has FIVE (bless their hearts!)



Recognition





Reporting

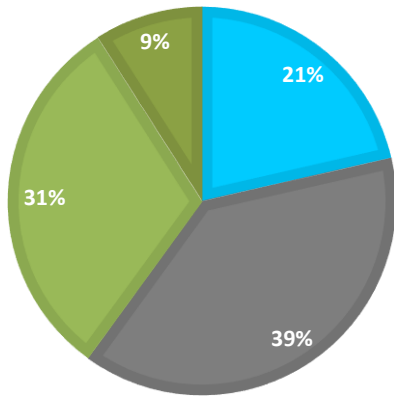
Works	Doesn't	Barely
Endowment/Investment	Blanket Piece	Personal Letter
Impact Directly Tied to Gift	Not Sharing Even When Results Are Available	Letter with Impact Paragraph
Tiered Approach		

It's ALL about Measurable Results!



REPORT TYPES

■ Investment ■ Endowment Usage ■ Current-Use/Impact ■ Blanket

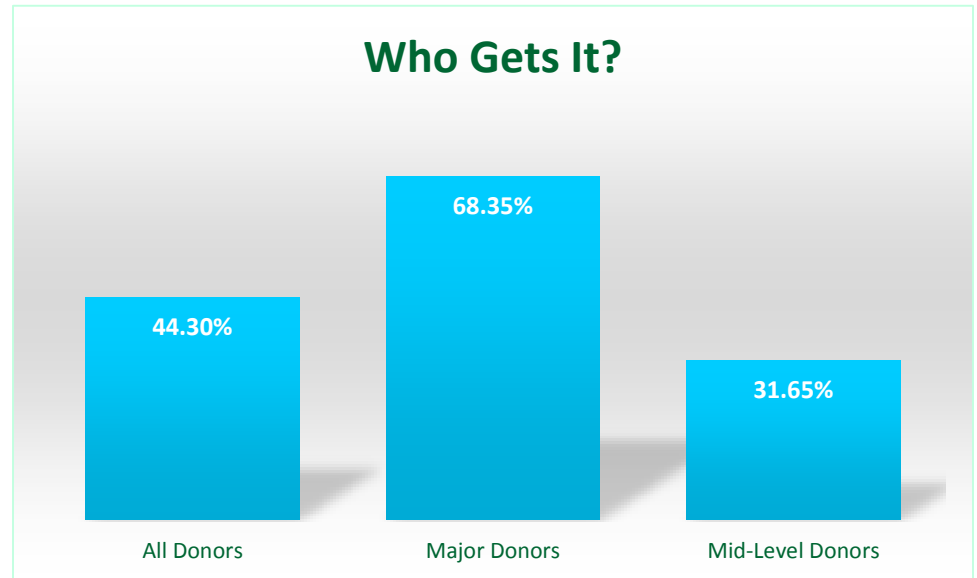


Comments:

Annual Fund Report New This Year
Electronic to all/Mail to Major Donors
One report with impact stories
Financial statement of endowed funds
Case-by-case for current-use

Measurable Results

Who Gets It?



Comments:

Endowment Donors Only
All Donors with a Gift Agreement



Reporting





From Donor Stewardship To Donor Experiences

- What if...
 - We stopped thinking about stewardship as a function we have to do after a gift

AND INSTEAD

- As a thread that runs through the overall donor experience each of us is responsible for creating?
- With each additional connection, donor relationships will deepen.
- Creating a Culture of Stewardship
- Credit to Kathy Drucquer Duff, CFRE, kddphilanthropy.com



How Do You Start?

- Share impact stories regularly, rather than 12 months after the gift is made.
 - Remember and acknowledge key milestones in donors' lives in a personal way.
 - Engage staff leadership with donors.
 - Think about how we honor relationships rather than gifts.
- Credit to Kathy Drucquer Duff, CFRE, kddphilanthropy.com



Be Unique



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