

Building a Distinctive Stewardship Program: From One Day Conference to Year-Long Experience

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Today's Objectives

- + To present the evolution of Planned Parenthood's recognition societies and related events and some lessons learned along the way
- + Provide a framework for assessing stewardship events tied to a recognition society
- + Discuss attendees' successes and challenges

About Us

Symone New

- At PPFA since 2016
- Six years of fundraising experience
- Worked at caused based organizations related to health and education



Caroline King

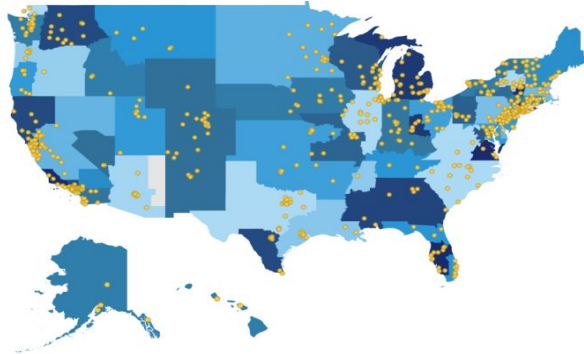
- At PPFA since 2014
- Fourteen years of fundraising experience
- Worked at caused based, international, and disaster relief organizations



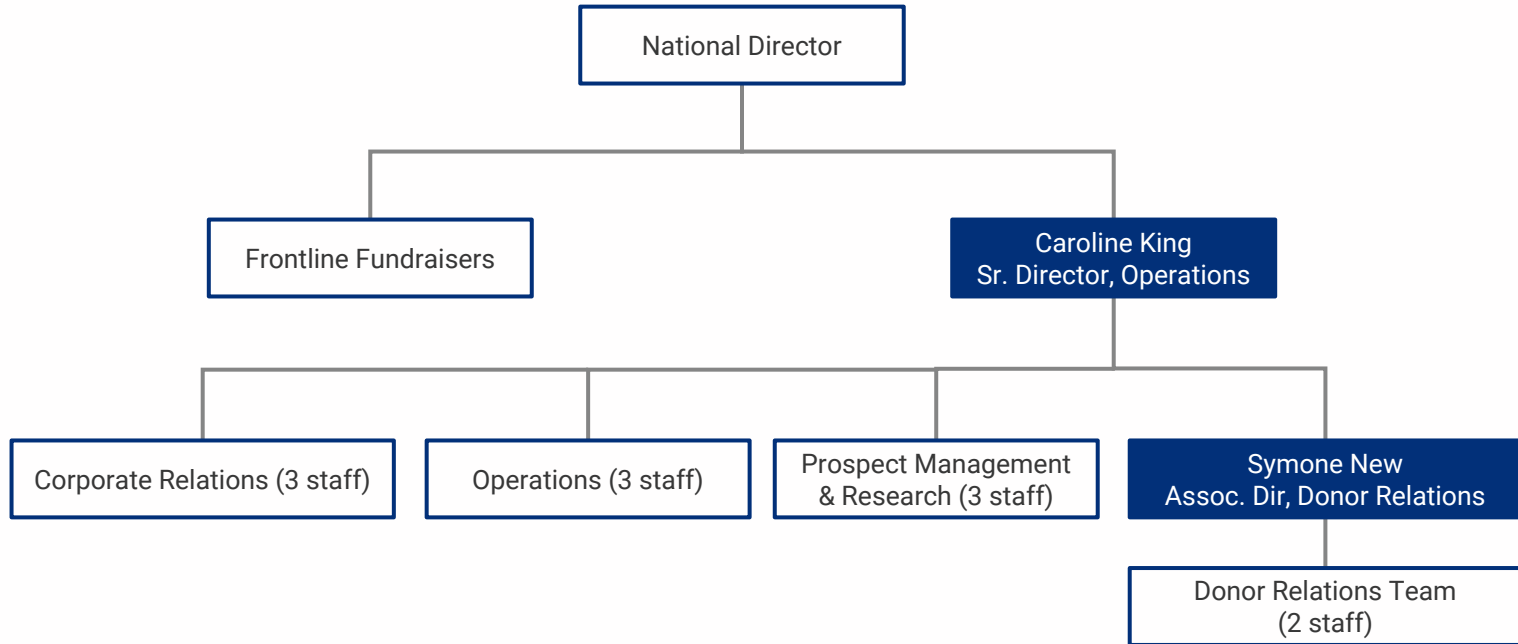
Planned Parenthood in a few words

The nation's leading provider and advocate of high-quality, affordable health care for women, men, and young people, as well as the nation's largest provider of sex education.

Organizational Structure



Principal and Major Gifts Team



Leadership Council

- + Planned Parenthood Federation of America's Leadership Council is a community of our most generous supporters from across the country
- + Members contribute \$25,000 annually



Leadership Council Evolution

2006

First Leadership Council Conference

40 members gather in New York City for the inaugural conference

Leadership Council positioned as an annual giving society

Tradition of an annual conference continues

2014 - 2015

Shift to an annual recognition society with year round engagement

First event for annual donors of \$100,000+

Affiliates encouraged to invite their qualifying donors

2018

Continuing to segment donor experience to increase giving of current members

First West Coast Leadership Council Symposium, with a dinner honoring \$1,000,000+ donors

Long Term Goals 2015 - present

- + Start to segment our donor base
- + Renewed commitment to year-round recognition
- + Use volunteers and board members to deepen relationships
- + Donor-centered approach to counting annual giving including affiliate giving

PPFA Recognition Societies

	# of PPFA Donors	# of Affiliate Donors
Leadership Council (\$25,000+ Annual)	558	972 across all levels
Partners in Action (\$100,000+ Annual)	111	
Visionaries (\$1million+ to our Campaign)	72	

Year-Round Engagement Opportunities

- + Welcome letters and phone calls from our Leadership Council Co-Chairs
- + Leadership Briefing Call Series (approx. four calls per year)
- + Peer Networking at the Leadership Council Conferences
- + Insider updates through breaking news communications
- + Personal Outreach from Board Members
- + Visionaries receive personal communications from CEO and Board

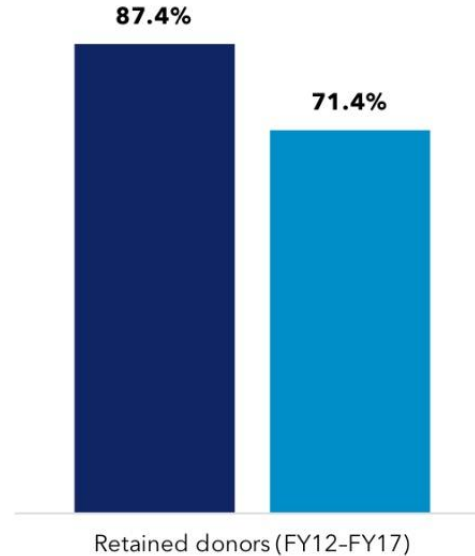


Impact of Additional Outreach

Principal and Major Gifts Retention

What is the impact of cultivation and stewardship among Principal and Major Gifts Donors (\$25,000+)?

- With additional outreach
- Without additional outreach



Top 5 Lessons Learned

Lesson #1: Use Volunteers Year Round



+ Leadership Council Co-Chair Welcome Process

- New / upgrading \$25,000+ donors receive a welcome letter and phone call
- Personal introduction from a volunteer elevates recognition, provides sense of community

Lesson #1: Use Volunteers Year Round



+ Development Council Engagement

- Connect Development Council Members with renewing Leadership Council donors as part of a weekly thank you process
- Engage Development Council in save the date and invitation follow up with the same donors
- Encourage meeting at the event or follow up with those who didn't attend

Lesson #2: Return to the Mission



- + Highlight the impact of donor investment in current programs
- + Provide an insider perspective on where the organization is headed
- + Engage external validators (organizational partners or donors)

Lesson #2: Return to the Mission



- + Include opportunities for board members and top donors to introduce speakers or moderate panels at the LC Conference
- + LC Briefing calls
 - Often combined c3/c4
 - Provides in-depth discussion on timely topics impacting PPFA/PPAF
 - Engagement of senior leadership, affiliate partners, and those working in the trenches

Lesson #3: Empower Fundraisers



- + [Over]share LC updates to help empower frontline fundraisers to use this as an engagement opportunity
- + Engage senior leaders from across the organization to do 1:1 follow up calls with important prospects that are unable to attend the LC Conference
- + Share exciting program updates leading up to the event with board members, development council members and senior leaders so they can use details in general and targeted conversations with donors

Lesson #4: Recognizing donors at different levels in one event



- + Do not schedule back to back receptions for donors at different levels
- + Be transparent (to donors and staff)
- + Where possible, recognize top level donors at events in front of those who aspire to be in the top set

Lesson #5: Follow-up/ Ask for Feedback



- + Survey our donors
- + Mass email to thank attendees and 1:1 outreach from Gift Officers to non-attendees
- + Schedule the next event ahead of time so we can advertise to a captive audience
- + Write your speaker thank you template ahead of time, and task one person to personalize the template

Questions

When adding additional recognition levels, what new engagement opportunities have you provided to help top donors feel more like insiders?

How are you recognizing donors who give at different levels across a single event?

How are you meaningfully engaging volunteers?



Thank You!

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