

2025 ADRP Northeast – Mid-Atlantic Regional Conference

May 16 | SUNY Global Center
New York, New York



ASSOCIATION OF
DONOR RELATIONS
PROFESSIONALS

BUILDING
RELATIONSHIPS
FOR GOOD

TM

Recognition Society Roadmap: From Strategy to Relaunch

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HELLO



YES!



WOW



HI!



WELCOME

Learning Objectives

1. We want to revise or sunset
2. We want to add a society
3. We want to increase a level
4. We are feeling generally stuck
5. Other

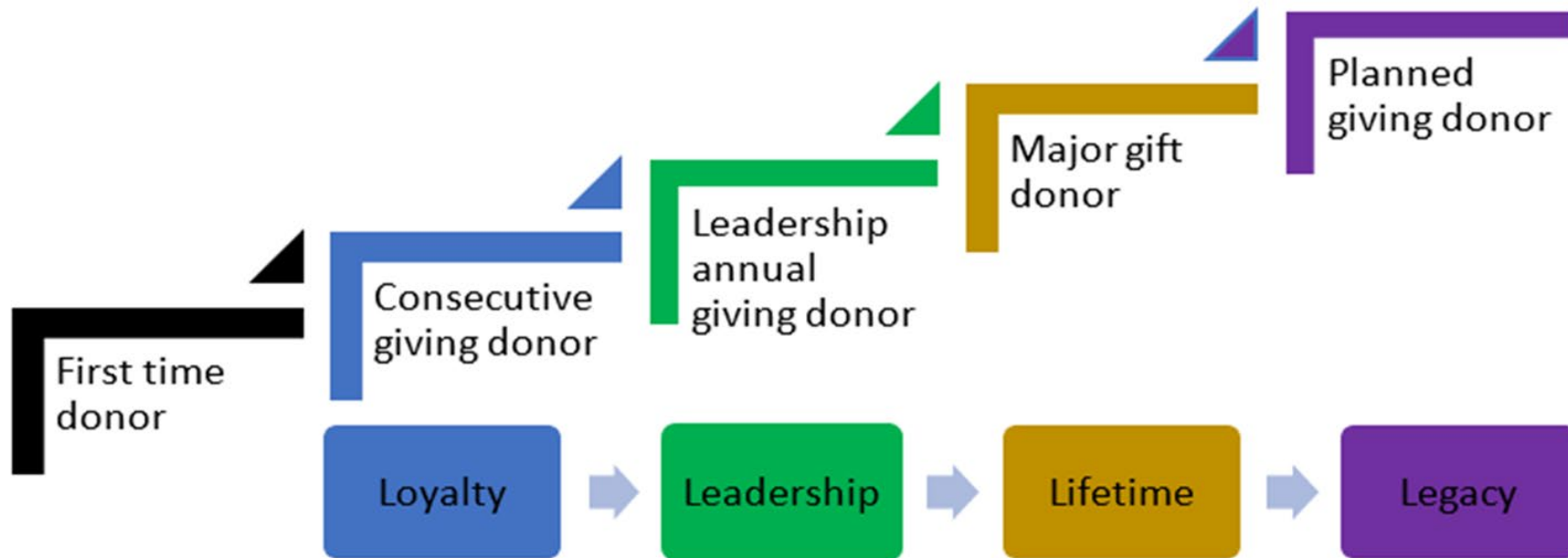
AGENDA

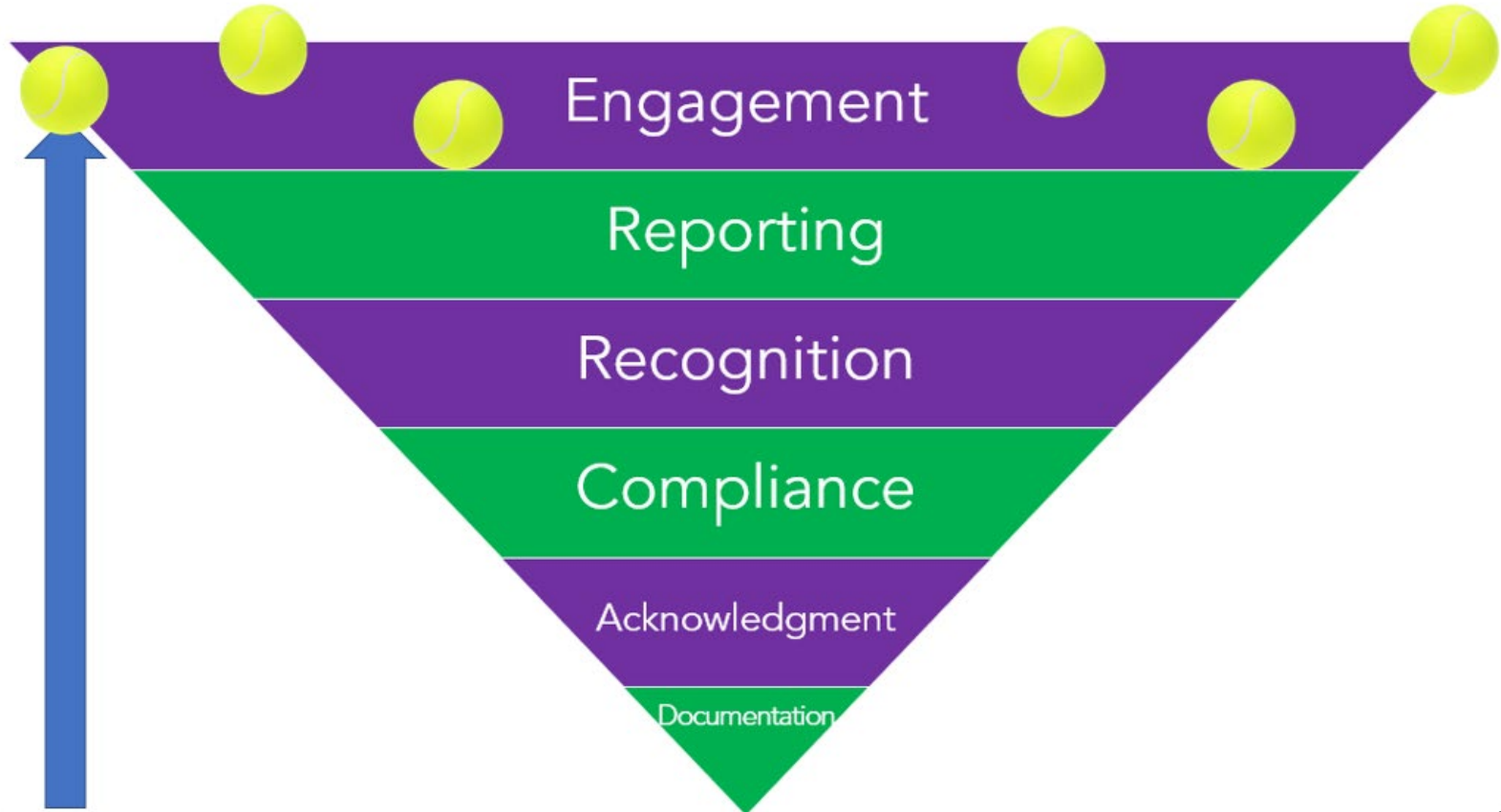
1. Overview – the what
2. Strategy – the why
3. Relaunch – the how

Overview: theory and our shared language



Recognize and reinforce behavior





Affinity

They are proud to be associated with you

Loyalty

They feel a sense of belonging and obligation

Gratitude

They are grateful for what you have done, for them and others

Honor and
privilege

They count themselves fortunate to be in a position to give

Nostalgia

They lovingly recall a time in their lives that warms their hearts

Consecutive

Loyalty
Pride
Gratitude
Affinity

Leadership Annual

Networking
Access
Socializing
Service

Planned

Philanthropy
Generosity
Legacy
Estate
planning

Lifetime

Philanthropy
Generosity
Legacy
Transformation

Recognition

DIFFERENCES

Annual

For the masses

Renewable

Upgrades and
renewals

Tchotchkes for
branding

Mass communications

Lifetime

For the elite

Permanent

Possibly upgrades

Highly customized
gifts

Personalized
communications

Strategy

- Goals

- Shift from benefits model to community-centric approach
- Add cohesion among societies
- Increase threshold
- Be inclusive

- Steps

- Reviewed our data
- Benchmarked
- Sought stakeholder buy-in
- Earned leadership buy-in



Relaunch

- What changed?
 - Qualification changes
 - Experience changes
 - From event-based to communications and impact based
- Rollout - Internal and External
- Challenges
 - Developing the strategy
 - Execution

What changed?



South Mountain Society Consecutive Giving

Qualification increased from two to three years



Brown and White Society Leadership unrestricted giving

New society was established recognizing leadership unrestricted annual giving



Asa Packer Society Leadership Annual Giving

Qualification minimum increased from \$1,000 to \$10,000 and other levels were removed



1865 Society - Lifetime giving

Rebranded with new society name and introduced a new \$20 million threshold



Tower Society Legacy giving through planned gifts and endowments

Logo update



Update on Lehigh University's Donor Recognition Program

The Asa Packer Society, established in 1967, was formed to recognize donors whose annual leadership gifts to Lehigh totaled \$1,000 or more. Embodying Asa Packer's spirit as a pioneer, leader, philanthropist, and visionary, these generous donors set a standard for what it means to support this great institution each year.

And so it has remained for more than half a century.

GO: The Campaign for Lehigh will be the most successful campaign in our history, keeping in step with the bold ambitions of the university. As we usher in this new age of philanthropy, it is essential that we realign our donor recognition program to recognize all our donors for the part they play in our success.

This new program reflects how donors who make gifts of all sizes contribute to the broad tapestry of our philanthropic community.

- Over the years, our annual leadership donors have supported our mission at levels commensurate with the times. Effective July 1, 2023, we will recognize all donors to Lehigh at the \$10,000 level or more as part of the *Asa Packer Society*.
- We are presenting a new opportunity for those who make an unrestricted gift of \$1,000 or more through the Lehigh Fund to be recognized in the *Brown and White Society*.

DONOR RECOGNITION UPDATE

NEW RECOGNITION SOCIETIES

Revitalized program celebrates donors for the many ways they support Lehigh.

Doors open. Passions ignite. Experiences take hold. We dream big. This is the impact that donors who make gifts of all sizes have on the university.

GOcampaign.lehigh.edu will be the most successful campaign in our history. As we usher in this new age of philanthropy, we will celebrate donors who make gifts of all sizes with new and revitalized recognition programs.

Join us as we keep going — together — to fulfill our ambitions for Lehigh and its promise for the future.



South Mountain Society

Recognizing those who support Lehigh year after year.

South Mountain is the bedrock on which Lehigh was founded through a singular act of transformational philanthropy in 1865. It is an icon of our strength and stability. For that reason, it is a fitting name for a society recognizing consecutive giving of donors who make their gifts year after year and provide a powerful foundation that supports the student experience.



Brown and Brown Society

Recognizing those who make gifts to the Lehigh Fund of \$1,000 or more.

In 1927, when Lehigh formed the Lehigh University Alumni Fund, the goal was simple — to encourage every alumnus to give what they could, every year, as the institution was being built, stone by stone. Nearly 100 years later, that unwavering support is just as critical to Lehigh's success. The unrestricted support of the Lehigh Fund allows the university to fulfill its highest priority, which currently is scholarships and financial aid. It also helps provide resources the university can use to respond to unanticipated needs and to take advantage of emerging opportunities.



Asa Packer Society

Recognizing those who support Lehigh with annual leadership gifts of \$10,000 or more.

Pioneer. Leader. Philanthropist. Visionary and more. As a driving force of America's industrial revolution, Asa Packer was positioned to make the kind of historic impact that has shaped generations beyond. Fittingly, the Asa Packer Society recognizes the committed annual supporters whose gifts sustain our commitment to core values by sustaining our commitment to core values and expanding the impact of our teaching and research.



Tower Society

Recognizing those who have provided a significant gift of intention, life income gift, and/or a gift of real estate.

Lehigh's towers stand out across the university landscape, giving and endowment donors stand out as a source of stability and strength, now an integral part of our estate plans through a confirmed bequest, playing a crucial role in ensuring we are able to sustain our mission.



1865 Society

Recognizing those whose lifetime gifts to Lehigh total \$1 million or more.

In 1865, railroad magnate Asa Packer founded Lehigh Mountain along with \$500,000 of his personal fortune to establish an educational institution — to establish a foundation for transformational giving to Lehigh.

Transformational donors break new ground. They are instrumental in insuring the future of the university. These exceptional donors, whose lifetime gifts to Lehigh also at levels of \$10 million and \$20 million or more, open up boundless possibilities.



Lehigh's new donor recognition program begins with the start of the university's 175th anniversary on the campaign and you can contact the Office of Development at (610) 758-2586 or visit [lehigh.edu/gocampaign](#).



Dear <Combined Informal Salutation> ,

We're thrilled to share some exciting news with you: Lehigh's donor recognition societies have been relaunched. Through these societies, you will be connected to the incredible impact you make on our community.

You've already transformed life at Lehigh. You are part of a strong community of alumni and friends who passionately contribute to Lehigh through loyal, leadership, lifetime, and legacy giving. For all of this, thank you. You support Lehigh's mission to advance learning through the integration of teaching, research, and service to others.

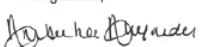
We are delighted to welcome you into the recognition society(ies) listed below. The South Mountain, Brown and White, and Asa Packer societies recognize those in our community who donate annually within a given fiscal year (ex. July 1, 2022 - June 30, 2023). The Tower Society and 1865 Society honor legacy and lifetime giving respectively.

- **South Mountain Society.** As a loyal donor of three or more consecutive years, you shape the lives of students year after year and provide a strong foundation to support the student experience.
- **Brown and White Society.** Your annual support of \$1,000 or more to the Lehigh Fund helps the university address its most pressing needs, funds emerging opportunities, and demonstrates your belief in Lehigh and its students.
- **Asa Packer Society.** Your annual leadership gifts enable Lehigh to fulfill its mission and to attract brilliant faculty and students who will lead us toward a better future and world.
- **Tower Society.** Your legacy gift builds a solid foundation to sustain the bold ambitions of the university for generations to come.
- **1865 Society.** Your transformational lifetime gifts are the foundation upon which Lehigh stands, and we are grateful to you for your commitment to the university. With this exciting relaunch, we have included an 1865 Society pin. We hope you'll wear this proudly at Lehigh events.

Our goal is to celebrate you and the difference you're making, both on campus and beyond. It's important to recognize just how much you've influenced the experiences of countless bright minds here at Lehigh. Your support has made a lasting mark, and for that, we are truly grateful. As we look ahead, we're excited about the prospect of staying connected with you over the upcoming year.

To learn more about Lehigh's donor recognition program, scan the QR code or visit alum.lu/societies. You can also reach out to Roma Narkhede, associate director of donor relations at (610) 758-2822 or ron222@lehigh.edu.

With gratitude,


Amber Alexander
Senior Director, Donor Relations



South Mountain
Society



Brown and White
Society



Asa Packer
Society



Tower Society



1865 Society

IMPACT 2024



Brown and White Society

Celebrating your annual leadership support to the Lehigh Fund.

The Lehigh Fund supports one of the university's highest priorities — financial aid and scholarships. Because of your annual giving, more future makers have the chance to embrace curiosity and innovate fearlessly while experiencing all that their Lehigh education offers them.



Jermaine Marshall '24

Bachelor of Science in Business and Economics
Hometown: New Rochelle, NY



A scholarship recipient, Jermaine embraced the uniqueness of campus life during a pandemic and navigated his academic path with determination. His journey embodies the essence of the Lehigh experience. We extend our gratitude to you and the rest of the Brown and White Society community whose generosity shapes the future for students like Jermaine.

Thank you for your unwavering support of the Lehigh Fund!

In my first year, I arrived at Lehigh during the COVID-19 pandemic, which made my first-year experience atypical. That year, I lived in Stoughton Hall without a roommate, had limited access to on-campus facilities, and limited social interaction. However, I also met some of my best friends later that year, some of whom would end up living with me four years later. In my second semester, I joined the Delta Chi fraternity, which offered more camaraderie with my peers.

In my sophomore year, I transferred to the College of Business and began taking courses in accounting and business. I joined the Association of Student Alumni, the Finance Club, and the Real Estate Club. As the year continued, I encountered the Lehigh traditions I missed in my first year, like Bed Races. I also moved from Stoughton to reside with my fellow fraternity members in our chapter house and

Challenges

- Developing the new strategy
 - Timing
- Execution
 - Donor disappointment
 - Competing in the communication space

Questions?

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