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ASSOCIATION OF
DONOR RELATIONS
PROFESSIONALS

BUILDING
RELATIONSHIPS
FOR GOOD™



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Better Together: Team Stewardship, Data & Gifts



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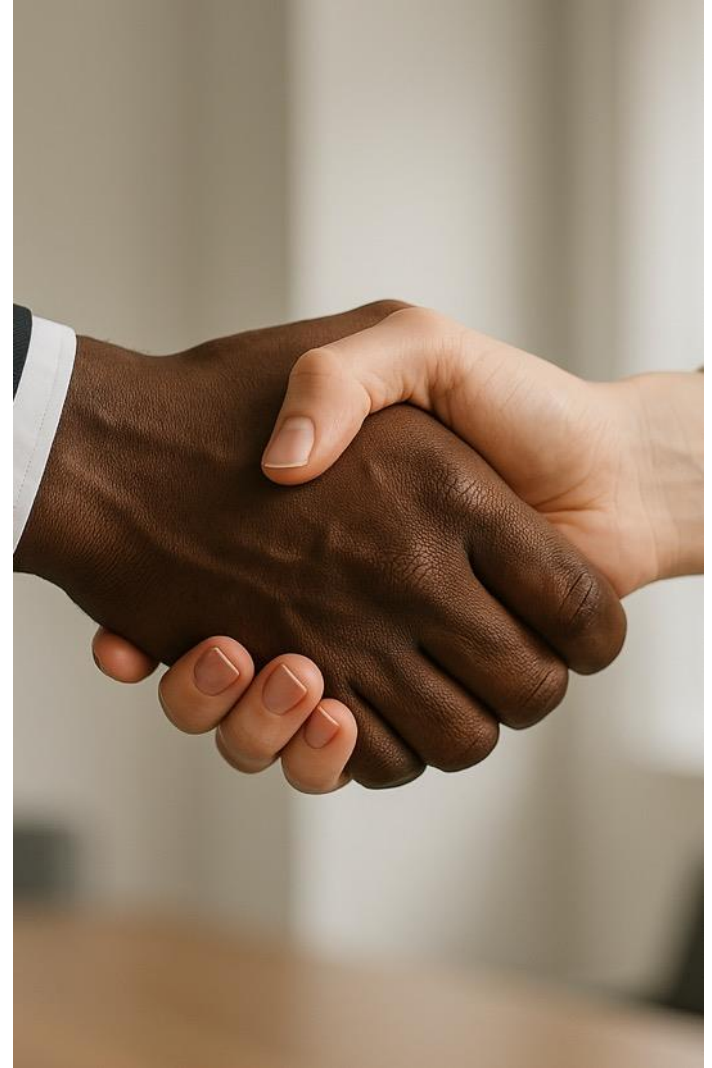


A TYPICAL DEVELOPMENT OFFICE ORGANIZATION

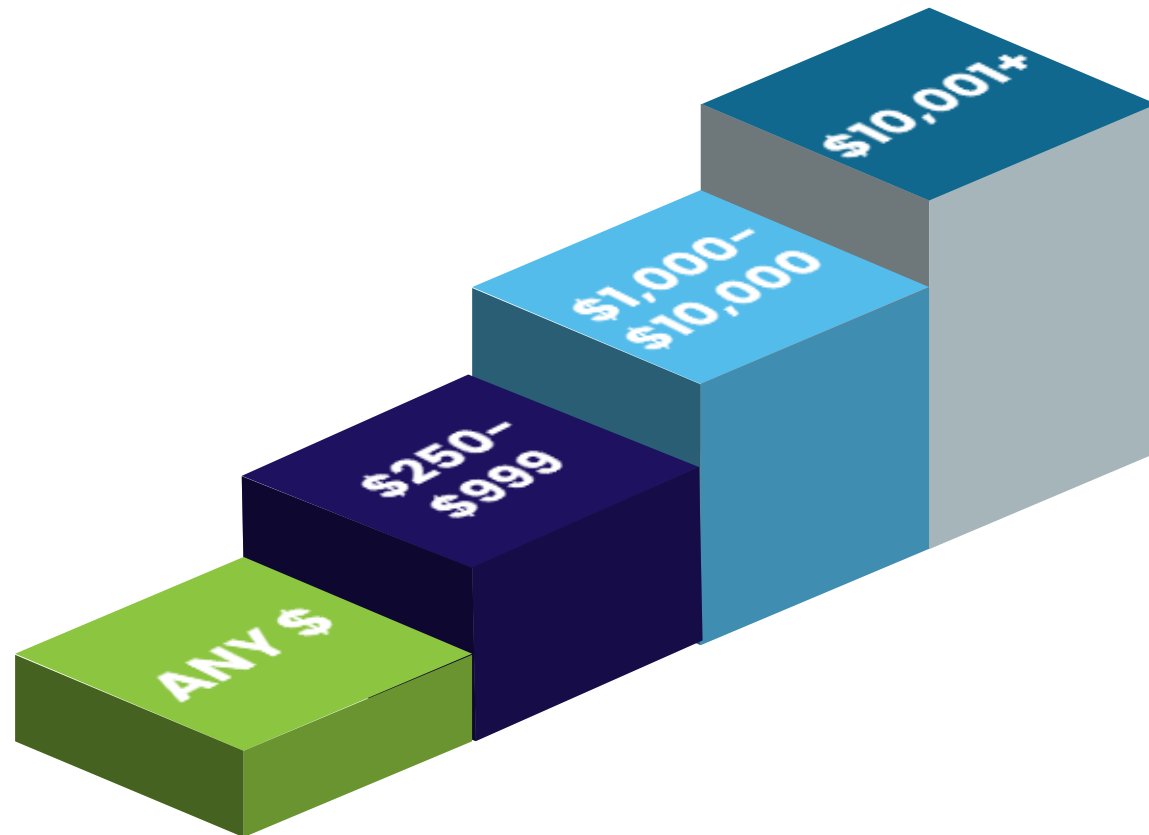


Stewardship in Fundraising (stuərdʃɪp):

Commonly refers to the ongoing process of nurturing and maintaining relationships with donors after they have made a gift.



STEWARDSHIP STANDARD OPERATING PROCEDURE



\$10,001+

Add a personal call from leadership and one-on-one meetings

\$1,000 - \$10,000

Add recognition in reports, invitation to special events and quarterly updates

\$250 - \$999

Add a personalized thank-you letter, an annual impact report and a holiday card

ANY AMOUNT GIFT

Welcome email; thank-you call and introductory newsletter

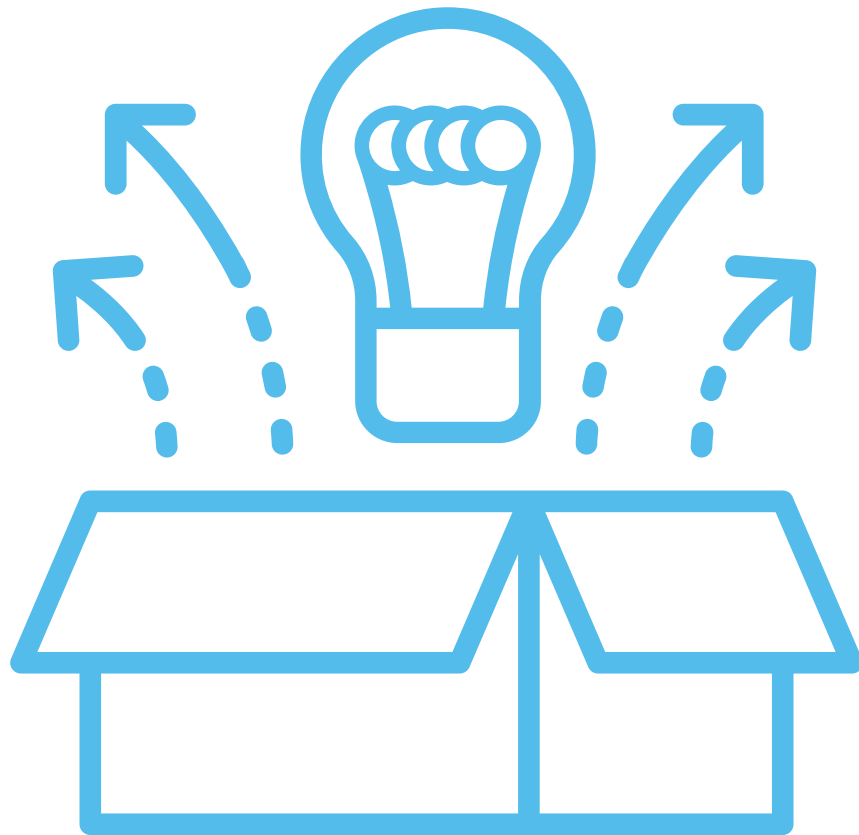


THE CHALLENGE

Stewardship staff is focused on the **last gift** and major gifts staff is focused on the **next gift**.

What if both focused on the past, present and future of **the donor**, not just the gift?

Can better data-informed stewardship and cultivation plans be made jointly?



Better Together

Developing a “joint” team of stewardship, data/CRM and major gifts for major donor relationships



Building The Team

3

Data / CRM Staff

2

**Major Gift / Front
Line Fundraiser(s)**

1

Stewardship Staff



Stewardship Staff

- Develops a **narrative to demonstrate the specific change that will occur as a result of the contribution/investment.**
- Weaves the compelling narrative into all communications, acknowledgements, updates, reports and emails.
 - ✓ Include **beneficiary statements/stories** made by those who are positively impacted.
 - ✓ **Be emotional**, an enthusiastic connection to the resulting change should be clear.
 - ✓ Help the prospect **learn something new** and elicit a response to make the narrative attention worthy.
 - ✓ **Keep it short** and memorable, allowing the prospect to envision the change even if it is complex.
 - ✓ Have a plan for increased leadership access, **experiential stewardship** and responsiveness.



Data/CRM Staff

Capacity Range	Records In Range	Range Percentage
\$100 million +	3	0.02%
\$50 million to \$100 million	0	0.00%
\$10 million to \$50 million	6	0.04%
\$5 million to \$10 million	12	0.07%
\$1 million to \$5 million	428	2.55%
\$500,000 to \$1 million	571	3.40%
\$250,000 to \$500,000	370	2.20%
\$100,000 to \$250,000	2,995	17.84%
\$50,000 to \$100,000	3,431	20.44%
\$10,000 to \$50,000	8,853	52.75%
\$1,000 to \$10,000	70	0.42%
Under \$1,000	45	0.27%

Donor screening data from an actual client



Data/CRM staff

PROSPECT	TOTAL GIVING	GIFTS TO OTHERS
	\$100	\$100,000
	\$118	\$100,000
	\$150	\$250,000
	\$100	\$1,000,000
	\$100	\$5,000,000
	\$250	\$50,000
	\$150	\$100,000
	\$250	\$50,000
	\$100	\$50,000
	\$200	\$500,000
	\$100	\$100,000

Donor screening data from an actual client (names removed)



Major Gift/Front Line Fundraiser(s)

- Is the key leader in **forming connections and relationships** with donor.
- **Drives opportunities** for the donor to better understand the impact of the organization's big ideas.
- Synthesizes qualitative (from their relationship) and quantitative (from the data team) information, along with **compelling and passionate stories** to help the donor consider moving your cause into their higher giving levels.



- Can communicate a sense of **timing and urgency** of the need and proposed solution.
- Establishes **the opportunity to ask** and manages the follow up.



Consider Reexamining Definitions

Major Gifts vs. Major Donor

It's about them! If they are giving to you one of their top 3 gifts, they are major.

Positioning for Priority

Examine the drivers needed to help the donor see your cause **in their top 3-5 charities.**

Sustained Stewardship

It's more than an administrative letter generating function

Strategic Cultivation

Move beyond how great you are and be prepared to demonstrate to donors **how great you could be.**



TRENDS

Keep an eye on...

Strategic and Personalized Giving

Major donors are increasingly approaching philanthropy with a more **strategic mindset**, often involving **Donor-Advised Funds (DAFs)**, **blended gifts**, and **planned giving**.



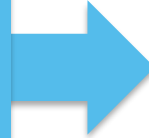
Fundraising teams should be prepared to: Engage in **multi-layered conversations** about legacy, impact, and alignment with donor values, curating personally-designed **giving opportunities** that reflect donors' personal missions and long-term goals.



Keep an eye on...

Emphasis on Openness Impact and Change

Today's donors (especially younger generations) demand 1. **clear evidence of impact** through compelling and understandable data and storytelling. 2. openness **and transparency** in how funds are used. 3. access to on demand, **real-time updates** that show how their contributions make a difference.



Fundraising teams need to be **prepared to:** Respond to donors in a manner that resonates with them.
One impact report does not fit all donors.



Keep an eye on...

Demographic Shifts and Inclusive Engagement

The donor landscape is evolving. **Women and younger generations (Millennials and Gen Z)** are becoming more influential in major giving. These groups are less transactional and prefer **collaborative, values-driven philanthropy**, digital engagement, and causes that reflect their identities and passions



Fundraising teams must adapt by creating **inclusive, tech-savvy, and socially conscious campaigns** that continually educate the donor on the societal issues your organization is addressing.





WHERE TO GO FROM HERE

Where to begin

1. Begin to make **data-informed decisions**. Complete a screen to understand your greatest opportunities
2. Form your **working group of stewardship, data and frontline fundraisers**
3. Based on quantitative and qualitative information, **identify a select group of prospects** to bring to your working group
4. Establish objectives to a **forward-looking approach for major donors** to deepen their commitment.
5. Find opportunities to **combine thanking and educating**.
6. Create **experiential stewardship** opportunities that go beyond thanking and include personally involving the prospect in your mission.
7. Elevate **leadership's involvement** in the process.
8. View the entire **donor journey as forward looking**. There is a reason the windshield is larger than the rearview mirror.



It's More Than a Thank You Letter

Sample letter structure:

- Say **thanks and thanks again**
- **Educate** with an update about the societal problem you're addressing
- Update/info on your **impact and progress** in solving the problem
- How **their gift helped solve/**address the problem
- **Our bold plans** for the future include...





Case

Societal benefit and how philanthropy changes/impacts your mission



A Plan

Board commitment, staffing, technology, KPI's and execution



Prospecting



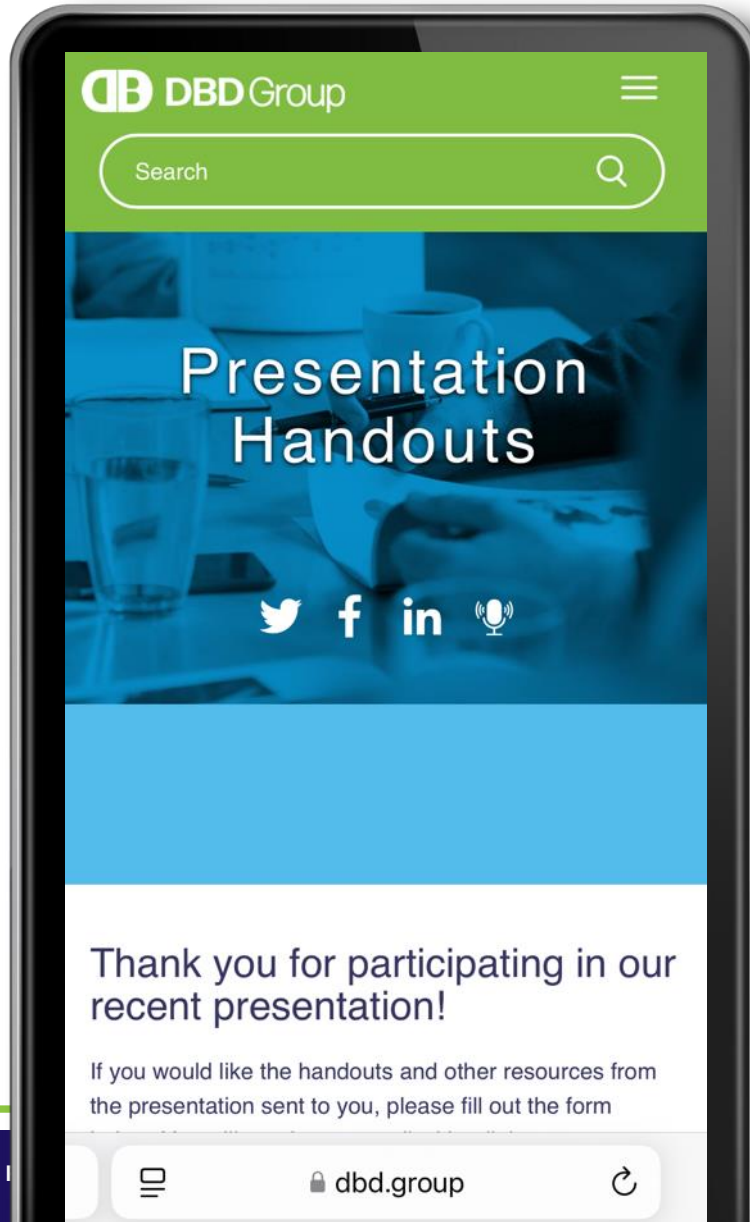
Understand your constituent's capacity and the opportunities

Leadership



Identify key volunteer roles and candidates. Remember leadership trumps almost everything





Download

A Practical Guide to Team-Based Stewardship, Data & Major Gifts Strategy Checklist

The first 5 to use this link are awarded a **30-minute conversation** with your staff team to **discuss a forward-looking approach.**





Thank you for your time

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