



# Customized Stewardship Strategies for your Top Donors

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# Susan Rankin

- Director, Stewardship & Donor Relations at McMaster University, since 2006
- Founded in 1887 in Toronto through a bequest from Senator William McMaster
- Relocated from Toronto to Hamilton in 1930
- 26,000 full time students (undergrad/grad)
- 170,000+ alumni in 137 countries
- Last campaign in 2010 raised \$474M
- \$73,792,993 raised in 2014 (goal: \$21.5M)
- Cost per dollar raised: \$0.06
- 96% of our donors are individuals
- Processed 15,130 gifts in 2014
- Use ADVANCE database (Ellucian)



# Discussion Items

- Definitions
- Who are your top donors?
- Relationships matter
- The backstage manager
- Make a plan
- Customize and Personalize
- Tracking, logistics
- Resources
- Q&A

# Definitions

- How do you define your top donors?
- \$ amount?
- Cumulative/Lifetime giving?
- Top Prospects?
- Planned Giving Donors?

# Analysis of the top

- McMaster's Top 20 review
- What did we learn?
- Why was it important?
- What next?

# Relationships Matter

- Who
- Engagement of the senior leaders
- Consistency in message
- Transition of relationships is important

# Make a plan...

- Stewardship plan checklist
- Monthly, annual touch points
- Engage others in the discussion
- The backstage manager
- Tracking the tasks and follow-up
- Be on the look out for opportunities

# Customize & Personalize

- Meaningful engagement
- One size does not fit all
- Engage family members
- Engage allied professionals, advisors
- Unexpected gestures
- Tracking the tasks and follow-up
- Look for opportunities



# Tracking & Logistics

- Use available tools
- Don't make it complicated
- Confidentiality of information
- When things go wrong...

# Resources

- *Intentional Stewardship*
  - Julia S. Emlen, CASE Books
- *The 4 Pillars of Donor Relations*
  - Lynne M. Wester, Academic Impressions
- *Abusing Donor Intent: The Robertson Family's Epic Lawsuit Against Princeton University*
  - Doug White

# Q&A / Thank You!

- Susan Rankin

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