



STEWARDSHIP FOR HIGH PERFORMANCE

**PREPARED FOR ASSOCIATION OF
DONOR RELATIONS PROFESSIONALS
FRIDAY, APRIL 10**

**DAVID PALMER
VICE-PRESIDENT, ADVANCEMENT
UNIVERSITY OF TORONTO**

MARCEL DESAUTELS

**Desautels Centre for Integrative Thinking
Roman School of Management**

**Why four+ eight-figure gifts
over 10 years?**

MICHAEL AND AMIRA DAN

**Waakebiness-Bryce Institute
for Indigenous Health**

Dalla School of Public Health

**Why a \$10 million gift to the
School of Public Health from the
Chair of Medicine Cabinet?**

WHY?

Stewardship

**Stewardship is the most important factor
in driving large gifts**

WHAT MOTIVATES LARGE GIFT DONORS?

TYPICAL FIRST TIME 7-FIGURE ALUMNI DONOR (AMONG CA/US PUBLICS)

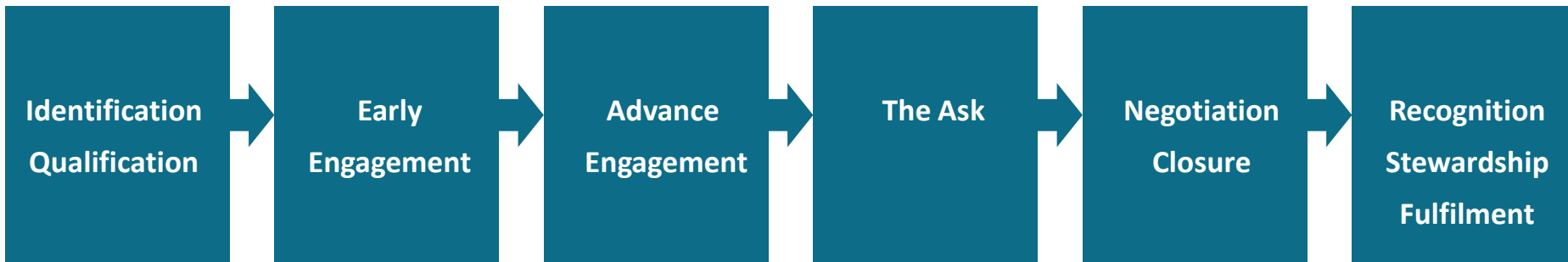
- Average number of gifts prior to first 7-figure gift:
30+ gifts
- Average number of years between first gift and first 7-figure gift:
21.9 years (13.6 at U of T)
- Number of years giving before first 7-figure gift:
15.9 years (9.1 at U of T)
- Median first gift of later 7-figure gift donor:
\$100 (\$250 at U of T)
- Average age at time of first 7-figure gift:
55 to 74 years (66.1 at U of T)
- Direct correlation between engagement with the institution and giving behavior

WHAT MOTIVATES LARGE GIFT DONORS?

- Seized with a challenge, the desire for positive change
- Belief in mission, vision and excellence of institution
- Confidence in leadership: vision, ability to deliver
- Belief in the institution's role as the natural and necessary vehicle to address the donor's cause, to achieve major impact
- Shaping role in institution's strategic response to its most pressing challenges
- Experience of extraordinary stewardship
- Exposure to exemplar donors
- Personal engagement with the institution, with its key stakeholders, and its critical challenges

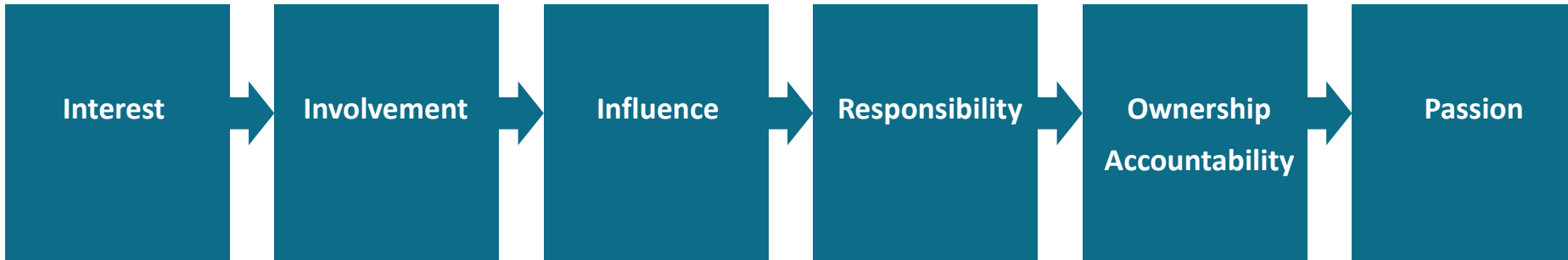
WHAT MOTIVATES LARGE GIFT DONORS?

Movement along the solicitation cycle



WHAT MOTIVATES LARGE GIFT DONORS?

Movement along the engagement cycle



WHAT MOTIVATES LARGE GIFT DONORS?

What results from movement along engagement cycle?

- Optimized inclination
- Sense of driving institution and cause forward
- At the leading edge of defining solutions
- Conviction in the institution's unique role and impact
- Sense of accountability to self and others to get it done
- Giving at capacity, beyond expectations

WHAT MOTIVATES LARGE GIFT DONORS?

What results from movement along engagement cycle?

- A note on measurement, accountability, and academic freedom

8 PRINCIPLES THAT DEFINE HIGH IMPACT STEWARDSHIP PROGRAMS

WHAT DEFINES HIGH IMPACT STEWARDSHIP PROGRAMS?

1. Stewardship that drives not just large gifts but repeated giving at increasingly high levels
 - Individual donors making multiple gifts increasing in size, scope, and impact, is a hallmark of extraordinarily successful advancement programs and campaigns
 - Stewardship is the prime driver of that giving success

WHAT DEFINES HIGH IMPACT STEWARDSHIP PROGRAMS?

2. Stewardship that amplifies impact of the gift
 - Goes beyond the donor's expectations—surprise and delight
 - Amplifies understanding of what gift can achieve beyond what was originally envisaged or understood
 - Directly connects the experience of that donor to the multiplying impact of the gift

WHAT DEFINES HIGH IMPACT STEWARDSHIP PROGRAMS?

3. Stewardship that expresses, connects, and promotes alignment between institutional values and donor values
 - Demonstrates integrity, authenticity
 - Resonates with your mission
 - Connects with the donor on a deeply personal and meaningful level
 - Reveals a sincere and caring commitment to fulfilling what you have undertaken together

WHAT DEFINES HIGH IMPACT STEWARDSHIP PROGRAMS?

4. Stewardship that connects the donor's narrative with institution's narrative, and with the initiative's impact
 - Recognizing such gifts have powerfully motivating stories
 - Requiring a firm understanding of motivation, narrative, and desired impact
 - Realizing such stories cannot be told too often
 - Reinforcing the story reinforces the purpose and motivation for the gift, and increases likelihood of subsequent giving

WHAT DEFINES HIGH IMPACT STEWARDSHIP PROGRAMS?

5. Stewardship that creates a culture of caring through multiple stakeholders and touch-points.
 - Stewardship is fundamentally about behaviour
 - Multiple stakeholders and touch-points necessary to drive a culture of warmth and appreciation
 - Coordination and management are important
 - Rigid control is unrealistic, ineffective and undesirable
 - Should never be reduced to a single channel

CAMPAIGN MILESTONE CELEBRATION SURPASSING \$1.3 BILLION RAISED

- Two initiatives in parallel
 - Comprehensive stewardship program to thank all donors and volunteers
 - Major milestone celebration event, held September 2013, to celebrate and recognize co-hosted by Campaign Executive John Cassaday, CEO of Corus, held at his waterfront location



CAMPAIGN MILESTONE CELEBRATION SURPASSING \$1.3 BILLION RAISED

- Comprehensive stewardship program included:
 - \$25k+ donors – personally signed thank you – 1,900
 - Annual Fund thank you post-cards – 19,750
 - Personalized letters to Campaign Executive and Campaign Volunteers – 260
 - Campaign Newsletter – 1,900
 - *U of T Magazine* Infographic – 320,000
 - *U of T Bulletin* – 31,000
 - *News @UofT* – 200,000
 - Milestone Event – 200 attendees

Date	Item	Audience	# of recipients
June 14	Campaign Newsletter	\$25k+ donors, Principals, Deans, Advancement staff, etc.	1,900
June 15	Thank you card (personally signed)	\$25k+ donors	1,900
June 19	UofT Magazine – infographic celebrating \$1.3B milestone	Alumni, donors, etc.	320,000
June 19	UofT News – campaign update	various	
June 20	UofT Bulletin	Staff, Faculty	31,000
July 8	Thank you postcard	Annual Fund Donors	19,750
July 12	News@UofT	Alumni, etc.	200,000
July 16	Thank you letter from President & VP Advancement	\$5M+ donors Campaign Executive Campaign Volunteers	260
July 24/25	Save the Date – milestone celebration event – mailed and emailed	\$500k+ donors, Campaign Executive, Campaign Volunteers, etc.	1,200
August 12	Milestone Event Invitation	\$500k+ donors, Campaign Executive, Campaign Volunteers, etc.	1,200
September 16	Milestone Event -guests receive a custom branded nano leaf bulb, Boundless Impact piece and Campaign Leadership Brochure	\$500k+ donors, Campaign Executive, Campaign Volunteers, etc.	200+ attendees
September 16	Post Event Thank You – email from the President	Event attendees	200+
October	Campaign Newsletter - update	\$25k+ donors, Principals, Deans, Advancement staff, etc.	1,900
October	UofT Bulletin – event story focusing on Rhodes Scholars	Faculty, staff	31,000
October 23	UofT News – event story focusing on Rhodes Scholars	Alumni, etc.	200,000
Fall	Boundless Impact Brochure – included in Donor Financial Report Packages	\$100k+ endowments	1,800

CAMPAIGN MILESTONE CELEBRATION SURPASSING \$1.3 BILLION RAISED



CAMPAIGN MILESTONE CELEBRATION SURPASSING \$1.5 BILLION RAISED

- Similar program, featuring comprehensive stewardship and thank-you campaign for all donors and volunteers
- Multiple channels
 - Annual Fund, Major Gift Donors & Principal Gift Donors
 - Owned Media – UofT Magazine, Campaign Newsletter, UofT Bulletin, News@UofT, UofT News
- Build up to major campaign celebration in November 2014, at which announced \$1.594 raised toward \$2 billion goal
- Event emphasized the growing start up culture of innovation and entrepreneurship at U of T

CAMPAIGN MILESTONE CELEBRATION SURPASSING \$1.5 BILLION RAISED



WHAT DEFINES HIGH IMPACT STEWARDSHIP PROGRAMS?

6. Stewardship that advances institutional strategy
 - Not just about thanking, recognizing, letters and cards
 - Can also provide a powerful lift to institutional strategy, to specific presidential initiatives
 - Alignment of stewardship events and major institutional initiatives emphasizes value and impact of philanthropy in a University-wide setting
 - Connects giving to institutional mission and broader societal benefits



OTTAWA

New rules target foreign workers

Officials who police temporary worker program given power to search businesses without warrant

STEVEN CHASE OTTAWA

Federal officials will have the right to walk into Canadian workplaces without a warrant as part of a tightening of the controversial foreign temporary worker program.

Changes to immigration and refugee protection regulations, published just days ago, give

Human Resources and Skills Development Canada officials or Citizenship and Immigration Canada officers the right to walk in on businesses as part of a random audit or because they suspect fraud.

Upon entering a property, officials will have wide powers of investigation. They will be able to "examine anything on the prem-

ises," question employers and staff, request documents, use photocopiers to copy records, and take photographs or make video and audio recordings.

They will, however, require a warrant if the property where foreign workers are employed is a private dwelling.

The new regulations come just months after the Conservative

government reversed course on the temporary foreign worker program with measures to make it tougher, and less economically attractive, to import short-term labour.

Hundreds of thousands of foreign workers came to Canada in 2011 — more than double the levels of a decade ago.

Workers, Page 18

URBAN DESIGN

U of T architects set to move in, give dilapidated, 'spooky' landmark a facelift



The University of Toronto's proposed development at 1 Spadina Cres. NADAAA/DANIELS FACULTY OF ARCHITECTURE LANDSCAPE AND DESIGN

ALEX BOZIKOVIC
KATHRYN BLAZE CARLSON

For 138 years, the building at 1 Spadina Cres. has been an oddity in Toronto's streetscape: a Gothic dinosaur in the middle of Spadina Avenue eliciting stories of ghosts and death, but also of healing and creativity. Now the

University of Toronto's architecture school is poised to move in and make this 1875 building a site for education, research and public discussion about cities.

U of T's Daniels Faculty of Architecture Landscape and Design will announce Tuesday the launch of a \$50-million campaign to make this its new home

— to build on a history that includes a theological school, a military hospital, art studios, medical labs, an eyeball bank and a student newspaper, all surrounded by streetcar tracks. The design, led by Boston architect and academic Nader Tehrani and his office, NADAAA, works with the historic building and adds an

expansion that combines architecture and landscape.

Prominent historian and U of T professor emeritus Michael Bliss declared One Spadina "part of the city's heritage," and former architecture dean George Baird called the revamp a "win-win for everybody."

Landmark, Page 12

GLOBE INDEX

'I don't have any regrets'

Alberta MP Brent Rathgeber talks about his decision to quit the Tory caucus, and life as the poster child for backbench dissent. News, Page A4

Radio-Canada and CBC president Hubert Lacroix apologizes for abruptly announcing plans to rename the French service, but says the broadcaster will press ahead with the rebranding. News, Page A4

Ontario more than doubles the number of inspectors working at its 63 long-term-care facilities. News, Page A6

Forces loyal to Syria's President gather near Aleppo to retake the city after momentum in the civil war swings toward government forces. News, Page A13

Apple introduces an audacious operating system redesign. Report on Business, Page B1

Lululemon's CEO steps down as the retailer sets its sights on expanding to Europe. Report on Business, Page B1

Don't write off the condo boom

Soaring condo numbers in Toronto renew fears of an overheated real estate market. Report on Business, Page B1

Video: A new boom for the condo market? tgam.ca/video

The Shaw Festival's reimagining of *Lady Windermere's Fan* is gorgeous and impeccably acted. Life & Arts, Page L6

Canadians have an unrealistically bleak view of the effects of a stroke, a poll finds. Life & Arts, Page L6

The Canadian Soccer Association suspends the Quebec Soccer Federation over its refusal to let turban-wearing children play. Sports, Page S7

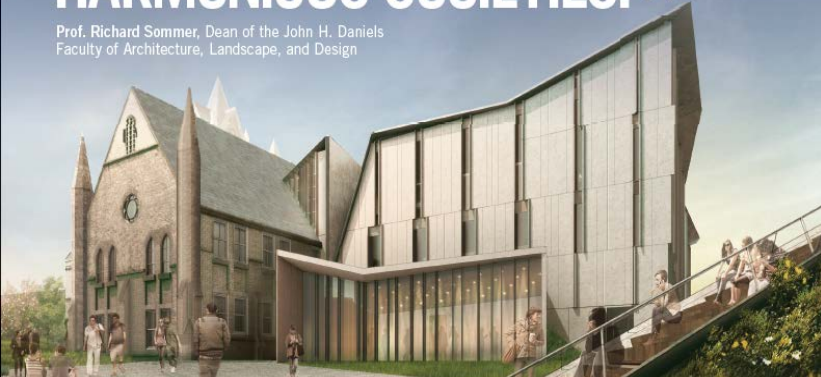
NHL playoffs

It's a different game in the postseason, and there's no better way to illustrate that than with this year's NHL award nominees. Sports, Page S1

DANIELS FACULTY LAUNCH COVERAGE OF ONE SPADINA

“ WITH THE REMAKING OF ONE SPADINA CRESCENT, WE WILL REIMAGINE THE DANIELS FACULTY AS A CATALYST FOR DESIGNING BETTER CITIES, BETTER WAYS OF LIVING AND MORE HARMONIOUS SOCIETIES. ”

Prof. Richard Sommer, Dean of the John H. Daniels Faculty of Architecture, Landscape, and Design



DANIELS FACULTY LAUNCH COVERAGE OF ONE SPADINA

Originally the home of Knox College, and later Connaught Laboratories—the world’s first producer of insulin—One Spadina Crescent is about to be reborn as the new home to the John H. Daniels Faculty of Architecture, Landscape, and Design. Thanks to a lead \$10 million gift from John and Myrna Daniels, which brings their total support to a remarkably generous \$24 million, the University has launched a campaign to renew the iconic building at One Spadina and integrate it with a bold new expansion to the north. Consolidating the Daniels Faculty’s programs in architecture, art, design, and sustainable urbanism, this revival of one of Toronto’s most historic precincts will establish a new platform to explore, and lead in the creation of more liveable societies. The University of Toronto thanks John and Myrna Daniels and all donors to date for their generosity and belief in this new vision for the Daniels Faculty.

daniels.utoronto.ca



UNIVERSITY OF TORONTO
JOHN H. DANIELS FACULTY OF
ARCHITECTURE, LANDSCAPE, AND DESIGN

**BOUNDLESS
to DESIGN**



BOUNDLESS

GOLDRING CENTRE FOR HIGH PERFORMANCE SPORT



GOLDRING CENTRE FOR HIGH PERFORMANCE SPORT

2014.10.02 First basket (4)

- Family event, for the naming benefactor to shoot the first basket

2014.10.06 Sneak Peek family event (3,000)

- Internal constituents and stakeholders, including students, staff, athletes, friends

2014.10.27 Grand Opening (424)

- VIPs, Government, Governance, Donors, Prospects, faculty and staff, student athletes

2014.11.07 Fundraising event (239)

- Donors, guests, prospects
- Four major gift announcements, tours, raised \$720k
- Goldring seat sale launched (118 to date)

GOLDRING CENTRE FOR HIGH PERFORMANCE SPORT

2014.11.10 Boundless Campaign \$1.5 billion celeb. (100s)

2014.11.21 Stewardship event for Kimel Family (165)

2014.11.21 First home games for BB teams (1,600)

2015.01.07 Inaugural BIA Cup (1,000s)

- involving Toronto's 788 BIAs, City of Toronto, GTA Basketball Associations, Toronto Sports Council

2015.05.23-24 Doors Open Toronto (8-10,000 est.)

- Featured building in Pan Am/Para Pan year

2014. Toronto Star article, Christopher Hume

- 10 Best Architectural Projects of 2014
- "Have athletics ever been so elegantly presented?"

GOLDRING CENTRE FOR HIGH PERFORMANCE SPORT

Opening and dedication events addressed strategic needs to develop audience and drive perception

- Reinforce the Goldring Centre as a social and civic destination
- Stimulate interest in the Goldring Centre and its amenities
- Seed attendance for our inaugural events and beyond, and the incentive to visit and revisit
- Increase visibility of athletics and healthy living within U of T community
- Create a memorable series of opening engagements
- Reach multi-stakeholders audiences with targeted messages for engagement (students, donors and prospects, alumni, neighbourhood groups, business groups)

STEWARDSHIP IN COMPLEX ENVIRONMENTS

STEWARDSHIP IN COMPLEX ENVIRONMENTS

U of T by the numbers

- 74,000 full time students
- 6,612 full time faculty with teaching and research responsibilities
- 6,140 administrative staff
- 27 major academic divisions (20 faculties and schools, 7 colleges, across 3 campuses)
- 9 fully affiliated teaching hospitals, as well as 20+ community-affiliated hospitals and healthcare sites across the Greater Toronto Area and beyond.
- 537,728 alumni in 197 countries

STEWARDSHIP IN COMPLEX ENVIRONMENTS

Boundless Campaign by the numbers

- \$2 billion goal
- \$1.67 billion raised to date
- 304,242 gifts; 87,000 donors
- 67,631 alumni attended events worldwide
- 9,223 volunteers
- 27 gifts of \$10 million or more
- 157 gifts between \$1 million to \$10 million
- 25,000 to 30,000 gifts annually, on average

STEWARDSHIP IN COMPLEX ENVIRONMENTS

Endowment reporting, by the numbers

- \$1.880 billion in endowments
- More than 5,700 separate endowed funds
- 427 endowed funds holding \$1 million or more
- 1,800 detailed Donor Fund Reports with financial statements sent annually to 1,400 distinct donors.
- 1,000+ narrative reports without financial statement sent annually.

WHAT DEFINES HIGH IMPACT STEWARDSHIP PROGRAMS?

7. Stewardship that is intentional
 - Requires conscious, deliberate choreography
 - Takes full advantage of existing milestones
 - Takes opportunity to create milestones
 - Anticipates anxiety, stays ahead of issues
 - Seeks to manage rather than own
 - Delivers value across the spectrum of relationship management

SNAPSHOT OF STEWARDSHIP AT \$1M+

IMMEDIATE RECOGNITION AND ACKNOWLEDGEMENTS	\$1M+	\$5M+	\$20M+
Divisional Thank You and immediate recognition	✓	✓	✓
Thank you letter and flowers (or similar) from President and/or VP Advancement	✓	✓	✓
Donor recognition program – event, signage, etc.	✓	✓	✓
		(typically hosted by the President)	(typically hosted by the President)
Advancement Communications – Owned Media – UofT Magazine, Campaign Newsletter, etc.		✓	✓
News Release	If approp.	✓	✓
Paid Media		✓	✓
		If approp.	If approp.
President's Circle Member – Annual Fund Society	✓	✓	✓
Donor Listings – UofT Magazine, Online UofT listing, Constituent Donor Listing	✓	✓	✓

INVITATIONS	\$1M+	\$5M+	\$20M+
Mailings – UofT Magazine, Campaign Newsletter, Constituency Mailings, A Year in Review	✓	✓	✓
Invitations – Presidential events, Ground Breakings, Building Openings, etc.	If approp.	✓	✓
Individual stewardship meetings with the President		✓	✓
REPORTING	\$1M+	\$5M+	\$20M+
Annual Reporting – Donor Financial Report (DFR)	✓	✓	✓
		(possible centrally managed DFR)	(possible centrally managed DFR)
Financial audit and statements	✓	✓	✓
		(possible centrally managed DFR)	(possible centrally managed DFR)
Gift fulfilment—tracking and monitoring	✓	✓	✓
-Disciplined review of all expectations	(managed divisionally)	(managed centrally)	(managed centrally)

SNAPSHOT OF STEWARDSHIP AT \$1M+

INDIVIDUALIZED STEWARDSHIP PLANS	\$1M+	\$5M+	\$20M+
Stewardship plan for milestone events	✓	✓	✓
-birthdays, appointments, anniversaries, etc.	(managed divisionally)	(managed centrally)	(managed centrally)
-1 year post gift, 5 year post gift, 10 year post gift	✓	✓	✓
	(managed divisionally)	(managed centrally)	(managed centrally)
Impact Report		✓	✓
-Summary Report every five years, to total impact		(managed centrally)	(managed centrally)
Individualized Principal Gift Stewardship Strategies		✓	✓
-highly tailored to particulars of each gift and donor		(managed centrally)	(managed centrally)
-Seek to maximize involvement, satisfaction, impact, touchpoints			

BOUNDLESSPOTENTIAL

KWOK SAU PO SCHOLARSHIP
ANNUAL RECIPIENT REPORT 2014-2015

SHARON LEE

Sharon has had a dream to become a mathematician since she was young. Now as a mathematics graduate student, she is closer to this goal. With the Kwok Sau Po scholarship, Sharon is able to attend conferences which provide more opportunities to enhance her academic experience. She greatly appreciates this scholarship and is committed to working hard to the betterment of the field of mathematics and its impact on society as a whole.

"I graduated from Nankai University in 2012, before I came to Toronto for my Masters and PhD study. Now I am beginning my third year in a doctoral program, and I am dedicated to making progress in my field, economic applications of Optimal Transportation, which is a branch of Analysis and Partial Differential Equations.

With this scholarship, I will be able to focus on my research and have more opportunities to attend conferences outside Canada. Please accept my heartfelt expression of thanks."



KWOK SAU PO SCHOLARSHIP

The Kwok Sau Po Scholarship is awarded to an international student from Hong Kong/China currently enrolled in any full-time master's or doctoral program at the University of Toronto on the basis of academic merit.

CONTACT INFORMATION

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TED ROGERS CENTRE FOR HEART RESEARCH

Historic \$130 million gift from the Rogers family to establish the Ted Rogers Centre for Heart Research

Largest private donation in Canadian healthcare history will bring together the strengths of SickKids, UHN, and U of T in individualized genomic medicine, tissue engineering, and advanced cardiac care.

TED ROGERS CENTRE FOR HEART RESEARCH

[TED ROGERS' LEGACY](#)
[HEART FACTS](#)
[THE CENTRE](#)
[RESEARCH EXPERTS](#)
[CONTACT](#)
[DONATE](#)

THE PROMISE OF A HEALTHY HEART.



On November 20, 2014

we launched an initiative that will forever change heart research.

THE TED ROGERS CENTRE FOR HEART RESEARCH

is a fitting legacy to the pioneering spirit of its namesake.

**On behalf of every Canadian,
our heartfelt thank you to the
Rogers family.**

Toronto General
Toronto Western
Princess Margaret
Toronto Rehab



UNIVERSITY OF
TORONTO

A NOTE ON COMPLEXITY

- Institutions:
 - Institutional CEOs, Foundation Presidents, VPs Research, Directors and Dean, Related Institutes and their Directors, Scientific Leads, Principal Investigators, Advancement staff, Communications staff
- Donor:
 - Family members, family and foundation advisors, Foundation structure, corporate structure, corporate executives (Leadership, Accounting, Finance, Communications), legal advisors, tax advisors
- Third parties:
 - Hill and Knowlton (Comm/PR/MR), STC (design)
 - Independent peer review

DONOR'S INTERESTS IN COLLABORATIVE APPROACH

- Whole greater than sum of parts
- Potential for global impact
- Potential for system wide change
- Multiplying effect
- Quality, reputation of institutions
- Comprehensive nature of the concept
- Common values

DONOR'S CONCERNS IN COLLABORATIVE APPROACH

- Ability to collaborate across silos, institutions
- Attention of CEOs
- Governance and management
- Deliverables and accountability
- How we measure success
- Fit with Ted Rogers' legacy and reputation

WHAT MADE IT WORK BETWEEN PARTNERS

- Prior track record of collaborative partnerships
- Experience with complex academic health initiatives
- Alignment in vision and leadership
- Embedded organizational structures that enable and support academic collaboration
- Commitment to serve academic priorities
- Shared values of transparency, communication
- Self-less approach to who gets and delivers what
- Collaboration on key decision points

WHAT MADE IT WORK BETWEEN PARTNERS

- Well managed execution across several parallel processes:
 - Scientific plan (outcomes, deliverables)
 - Proposal (measures, impact)
 - Gift agreement
 - Recognition
 - Announcement

ALIGNMENT REQUIRED ON MULTIPLE LEVELS

- CEOs of partner institutions
- Advancement leads
- Scientific leads
- Principal investigators
- Proposal leads
- Proposal writing and design
- Third party service providers

THE PROPOSAL



STEWARDSHIP IN COMPLEX ENVIRONMENTS

- Philanthropic partnerships provide tremendous opportunity and will only continue to grow
- Opportunities multiply well beyond any single institution's ability to deliver impact
- Success won't be measured solely on the basis of the partnership gift – key is for the partnership to deliver the results and milestones

STEWARDSHIP IN COMPLEX ENVIRONMENTS

- Elements of successful partnerships include:
 - Understanding what it takes to make partnership work
 - Compatible values
 - Clear goals, objectives and timelines
 - Open and honest communication
 - Trust and respect
 - Commitment to overcoming differences
 - Leadership – executive, scientific, advancement
 - Documentation – from proposal to gift agreement
 - Follow-through on your promises

WHAT DEFINES HIGH IMPACT STEWARDSHIP PROGRAMS?

8. Stewardship that is informed by solid data
 - Collection and evaluation of actual data, surveys
 - Benchmarking against other institutions
 - Creation of a stewardship scorecard with multi-year comparison

IN SUMMARY

SUMMARY

- What drives large gifts
- What motivates large gift donors
- What results from movement along engagement cycle
- What defines high impact stewardship programs
- How we manage stewardship in complex environments
- Number of case studies of large, complex gifts
- 8 principles of high impact stewardship programs

WHAT DEFINES HIGH PERFORMANCE STEWARDSHIP?

1. Stewardship that drives not just large gifts but repeated giving at increasingly high levels
2. Stewardship that amplifies impact of the gift
3. Stewardship that expresses, connects, and promotes alignment between institutional values and donor values
4. Stewardship that connects the donor's narrative with institution's narrative, and with the initiative's impact
5. Stewardship that creates a culture of caring through multiple stakeholders and touchpoints
6. Stewardship that advances institutional strategy
7. Stewardship that is intentional and managed
8. Stewardship that is informed by solid data