

From Stewardship to Strategy: Management Essentials in Donor Relations

Mark Lanum, Brown University
Angela Altamore, BWF

Who we are



Angela Altamore

*Assistant Vice President
Donor Relations and
Donor Experience, BWF*

aaltamore@bwf.com

Angela focuses on her passions for donor relations, stewardship, and donor experience and how each intertwine to drive impactful fundraising. Angela served as former president, treasurer, and board member for ADRP and currently serves as an adjunct faculty member at the Lilly School of Philanthropy.



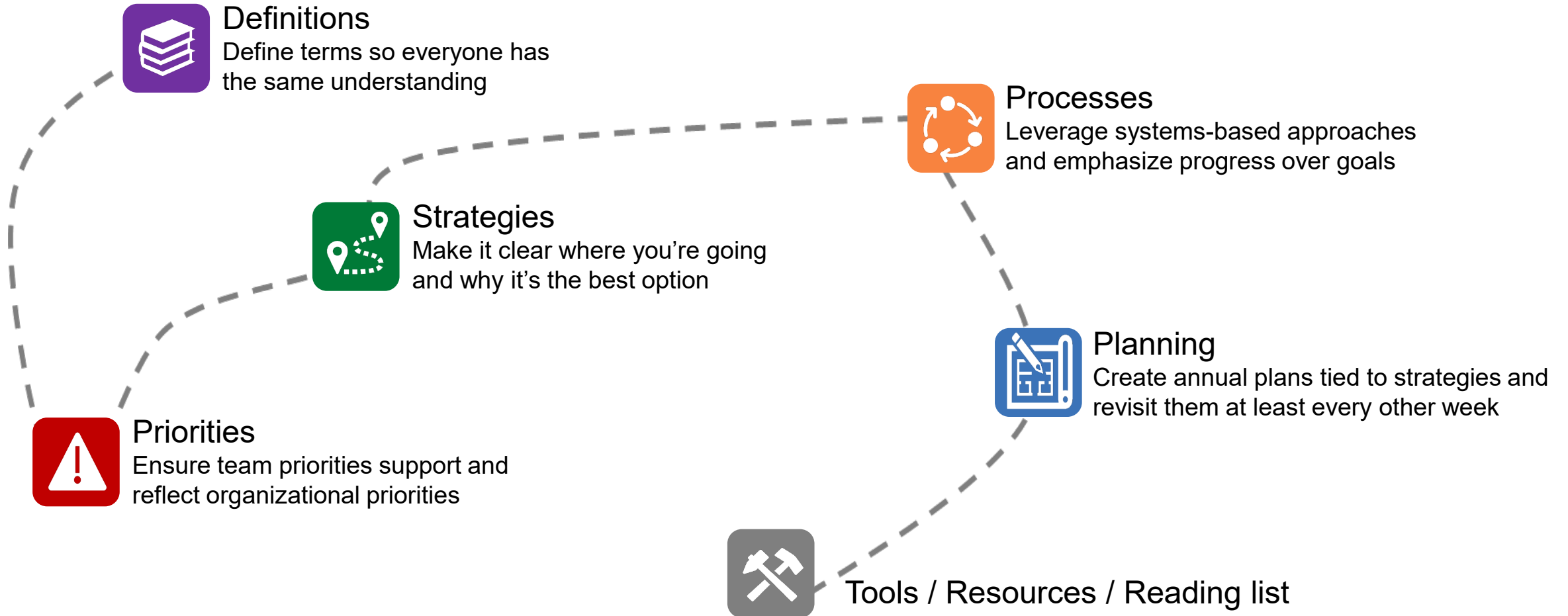
Mark Lanum

*Senior Director,
Donor Relations,
Brown University*

mark_lanum@brown.edu

Mark has worked in Advancement and Donor Relations for over 20 years. A people person by nature and computer nerd by choice, he enjoys developing and enhancing stewardship systems aimed at supporting and improving donor relationships, and he always enjoys a good laugh along the way.

AGENDA: 5 Foundational Skills for Effective DR Leadership & Management



DEFINITIONS

DEFINITIONS

Donor
Relations vs.
Stewardship

Strategy vs.
Tactics

Impact vs.
Activity

Priority vs.
Urgency

Service vs.
Partnership

If we are not aligned on what we mean, we can't align on what we do.

PRIORITIES

Priorities



Strong donor relations leadership isn't about doing more.

It's about creating clarity.

PRIORITIES

Align with organizational priorities

- Tie donor relations work to campaign goals, institutional strategy and donor experience outcomes

Use decision-making framework

- Does this advance a strategic goal?
- Is this the best use of our time and resources?
- What gets deprioritized if we say yes?

Day to Day Quick Filter

Score each request with a high, medium or low.

Criteria	Question	Score
Strategic Alignment	Does this directly support institutional or campaign priorities?	High
Donor Impact	Will this meaningfully improve donor experience or outcomes?	Low
Effort Required	How resource intensive is this for our team?	Medium
Urgency vs Importance	Is this truly time-sensitive or just perceived as urgent?	Medium
Opportunity Cost	What gets delayed or dropped if we say yes?	Low

RACI Model

Responsible

- The person who actually carries out the process or task assignment
- Responsible to get the job done

Accountable

- The person who is ultimately accountable for process or task being completed appropriately
- Responsible person(s) are accountable to this person

Consulted

- People who are not directly involved with carrying out the task, but who are consulted
- May be a stakeholder or subject matter expert

Informed

- Those who receive output from the process or task, or who have a need to stay informed

RACI Model Sample

Topic	Responsible	Accountable	Consulted	Informed
Annual Giving Stewardship Strategy	AG team	Director, Annual Giving	DR and Prospect Management	Leadership, Advancement
Leadership Annual Giving	LAG team	Director, Annual Giving	DR, Prospect Management and Dev Officers	Dev Officers
Principal Gift Stewardship	Principal Gifts lead and DR Manager, Gift Administration and Information Services	VP of PG and AVP of DR	Dev Officers, Fdn & Corp Relations, Senior Leadership	Executive Leadership and Special Events
Gift Acceptance Process		Sr. Dir. Operations	Directors, Major Gifts & Annual Giving, Sr. Dir. Fdn/Corp	MGOs, Annual Giving, Fdn/Corp Team, Dev Comm.

RAPID Model

Role	Meaning	What They Do
R	Recommend	Develops the proposal or solution
A	Agree	Must sign off (often compliance, legal, key stakeholders)
P	Perform	Executes the decision once made
I	Input	Provides perspective, data, or expertise
D	Decide	Makes the final decision (Only one person!!!)

PRIORITIES

Permission to say no or not now

- Help me understand how this fits within our current priorities.
- We can do this: what should we pause to make room?

Shift from reactive execution to intentional prioritization

- Move from “How do we get this done” to “Should we be doing this at all?”

STRATEGIES

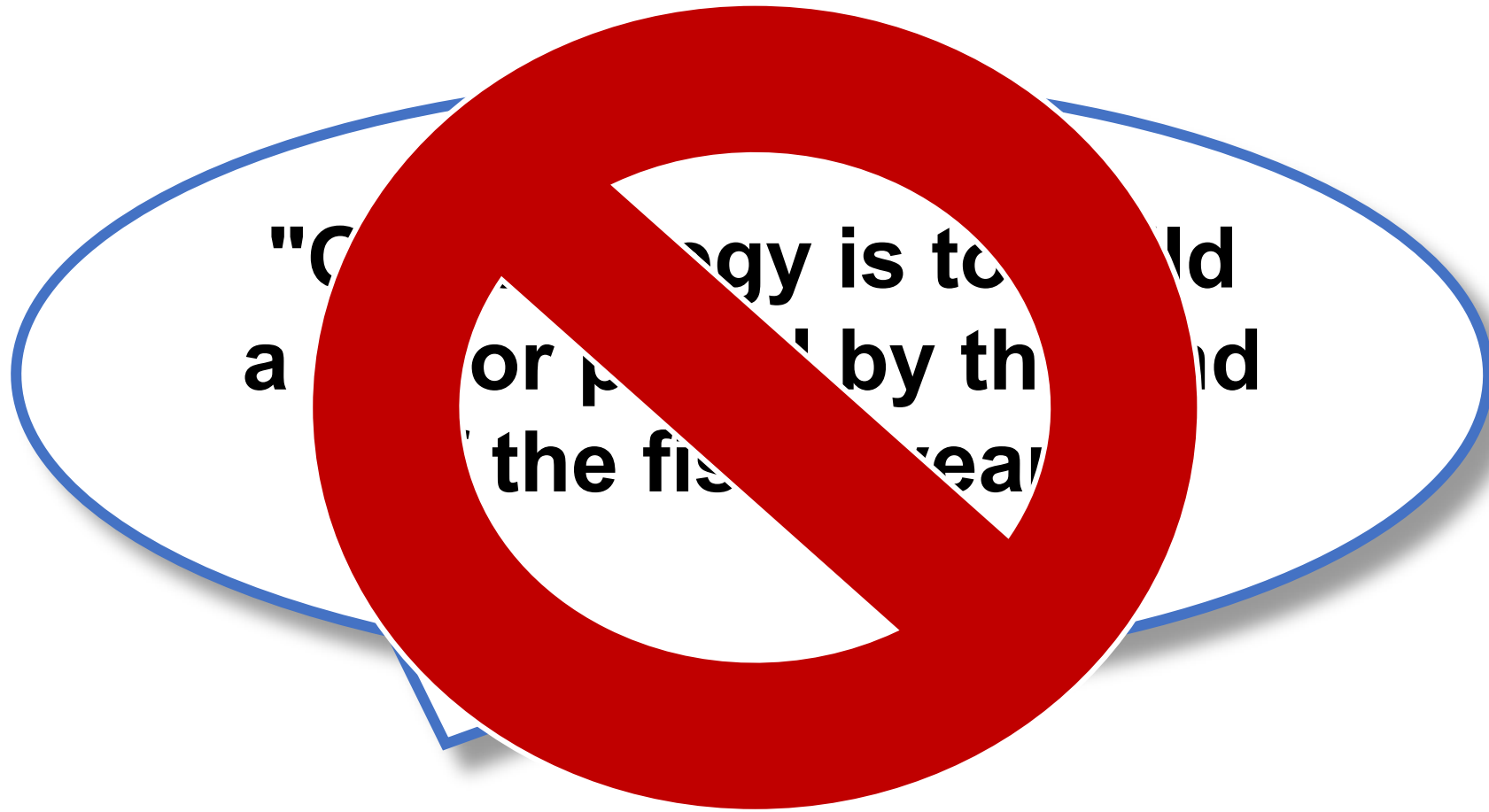
WHAT IS A STRATEGY?



WHAT IS A STRATEGY?



WHAT IS A STRATEGY?



STRATEGIES - Examples

"Encourage the donor behaviors we want by recognizing donors when they do them"

"Steward those who
WANT to be
stewarded"

STRATEGIES

A working definition of strategy:

A **decision** to move in a certain direction based on an assessment of a problem or opportunity (a "**diagnosis**") by aligning resources and taking coherent **actions** that are helpful to achieving a goal.



STRATEGIES



DIAGNOSIS

- Can make or break a strategy
- Think of a doctor determining the source/cause of an illness
- Must be "fearless" - willing to consider the uncomfortable

HOW-TO IDEAS

- Listening Tours
- Team brainstorming & SWOT analysis
- Test out your ideas on others; now test it again

"Identify the
human
beneficiary"

STRATEGIES



DECISION

- Obtaining broad buy-in is critical; revisit your diagnosis if buy-in is initially unsuccessful
- Rejection often means others don't understand the diagnosis – don't take it personally
- Communication is almost as important as the diagnosis

HOW-TO IDEAS

- Develop a written document:
 - 1 page summary
 - add'l pages with background, rationale, data
- Identify a memorable shorthand version and/or story
- Practice your presentation!!

"What you
water will grow"

STRATEGIES



ACTION

- It is vital to clearly show how a strategy supports leadership's priority(ies)
- A strategy that doesn't align resources (and with priorities) will struggle
- A good strategy statement suggests or implies some actions while ruling out others
- Leverage hard agreement to say "no" when needed

HOW-TO IDEAS

- Even the answer is unpolished, ask, "what will we point to as the indicator we are being successful?"
- Revisit your strategy document and metrics at least annually
- Adapt! "No plan survives engagement with the enemy"

"Steward those who WANT to be stewarded"

PROCESSES

PROCESSES

Annual Planning

Team Meetings

Project Planning

PROCESSES:

Structured, repeatable ways of doing things **designed** to achieve a **goal** or produce a desired output

Traditions

Hiring

Acknowledgements

Strategic Planning

Progress

Sustainability

Education

PROCESSES

PROGRESS IS THE GOAL

- *"How can we do this better next time / next year?"*
- Measure improvements in relation to previous iteration
- Too many, too specific goals can backfire
- Don't ignore specific goals – but keep them in perspective

HOW-TO IDEAS

- Think of it like a streaming show – "Season 3 of The New Reporting Process"
- Start and end each iteration with a review (i.e. last year, or what was just completed)
- Team feelings are a suitable, "unofficial" measure, but ask "what makes you say that?"



PROCESSES

SUSTAINABILITY IS KEY

- In an "Ad-hocracy" everything is one-off and bespoke
- Standards are the process equivalent of an organizational policy
- Consistent excellence and reliability is at the heart of sustainability
- Assess new projects based on strategy value/ROI and team capacity

HOW-TO IDEAS

- Quantify output/products in terms of staff time (e.g. 1 report takes ~3 staff hours)
- "Do the math" for leadership - (e.g. 3hrs. each x 1,000 reports = 3,000 staff hours)
- A commitment to excellence can be a justifiable rationale for pushback



PROCESSES

EDUCATION IS ESSENTIAL

- A great process is useless if no one understands it and/or follows it
- Gotchas to watch for:
 - o Single points of failure (only 1 person knows how to do a process – cross-train team members)
 - o Fire and forget (long intervals between cycles leads to memory loss – document processes)
 - o Don't assume everyone knows how – or WHY – a process is supposed to go
- Education and training is a core Donor Relations process and responsibility

HOW-TO IDEAS

- A good graphic design can make even the most boring process document seem cool
- Consider "Pride Points" as a means of communicating about processes
- Find a story to illustrate the value of a process



PLANNING

PLANNING

Create an annual plan tied to strategy

- Revisit biweekly or monthly
- On track? Shifting? What needs to stop?

Boundary setting

- Helps push back on last-minute requests
- Reframe “urgent” asks
- Reinforces focus

Normalize adaptation

- Plans are not static
- Adjust based on emerging priorities
- Avoid “set it and forget it”

PLANNING

Keep it simple to start:

- Identify your top 3-5 priorities
- List out the key initiatives under each
- Establish clear ownership for each area
- Formalize a cadence for ongoing review and adaptation

TOOLS / RESOURCES / READING LIST

TOOLS / RESOURCES/READING LIST

Templates:

- Day-to-Day quick filter
- RACI template
- RAPID template

Reading Recommendations

- *Good Strategy Bad Strategy: The Difference and Why It Matters* by Richard P. Rumelt
- *The Five Dysfunctions of a Team* by Patrick Lencioni
- *Four Thousand Weeks* by Oliver Burkeman
- *Soundtracks: The Surprising Solution to Overthinking* by Jon Acuff

READING LIST

- *Everything is Figureoutable* by Marie Forleo
- *Thanks for the Feedback: The Science and Art of Receiving Feedback Well* by Douglas Stone and Sheila Heen
- *The 15 Commitments of Conscious Leadership* by Jim Dethmer, Diana Chapman and Kaley Warner Klem
- *Smart Brevity: The Power of Saying More with Less* by Jim VandeHei, Mike Allen and Roy Schwartz
- *It's the Manager* by Jim Clifton and Jim Harter
- *What Got You Here Won't Get You There: How Successful People Become Even More Successful* by Marshall Goldsmith

What's your top takeaway?

Q&A / DISCUSSION / HOT TAKES



Angela Altamore

*Assistant Vice President
Donor Relations and
Donor Experience, BWF*

aaltamore@bwf.com



Mark Lanum

*Senior Director,
Donor Relations,
Brown University*

mark_lanum@brown.edu