

Kicking It Up A Notch..... or Two.....or Three

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Which are you?

A mediocre person tells.

A good person explains.

A superior person demonstrates.

A great person inspires others to see for themselves.

Harvey Mackay

Premise:

All Stewardship/Donor Relations is Cultivation

- How are your SDR fundamentals working to that end?
- What value / credibility does SDR have in your department? Across the organization?
- What / where are your challenges?
Motivations?
- How do you know if / when you're successful?

Session Goals / Takeaways

1. Build a more sophisticated SDR program
2. Enhance relationships with internal partners and stakeholders that enlist broad support, collaboration and communication
3. Enhance the philanthropic / stewardship experience for donors

Building Value and Credibility

Who are your partners?

- Think in layers using a cross trained team
- Divide and conquer
- Look for opportunities to increase visibility
- Quickly identify advocates and allies

Building Value and Credibility

What are your “tools”?

- Documented, processes and procedures
- Audits and other opportunities to increase visibility and/or act as facilitators, liaisons
- Consistent, high quality, creative deliverables

Challenges and Opportunities

- Timing
- Shifting of department priorities; staffing changes, turnovers, re-orgs; system changes or upgrades
- Interdepartmental communication and/or collaboration
- Unanticipated impact – and domino effect - of unit based business decisions

Measuring Success

- By the numbers, including four new SDR positions
- SDR procedures reinforced by other than us!
- Positive feedback on the caliber, dependability, flexibility and quality of SDR team and products
- Recognized and sought out for help as the experts

**You can have everything in life you want,
if
you will just help other people get what they
want.**

Zig Zagler

Gift Acceptance and Agreements

Basics:

- Gift/pledge amount, designation, pay schedule
- Appropriate level acknowledgement & recognition

Enhancements:

- Improve the product
- Improve the processes
- Opportunity to create strategic approaches/shared accountability with fundraisers

Acknowledgements

Basics:

- Timely, accurate, personal, meaningful, doesn't include a new solicitation

Enhancements:

- Managing variations and volume
- Less is More (content)
- Explore new modes of delivery and frequency of contact

February 20, 2013

February 20, 2013

Mr. and Mrs. Smith
One Main Street
Boston, MA 02215

Dear Mr. and Mrs. Smith:

Thank you for your gift to the Law School Building Fund. I deeply appreciate your generous support of the School's crucial plans to upgrade the facilities and resources available to both students and faculty.

I look forward to seeing you on campus for the groundbreaking of the Sumner M. Redstone Building on April 19th. I salute your longstanding dedication and leadership, particularly at this exciting time.

All the best,

Sincerely,

Robert A. Brown

RAB/kes

Jane Q. Sample, M.D.
2 Mountain View Boulevard
Beverly Hills, CA 90210

Dear Dr. Sample,

It is a pleasure to thank you for your gift of \$10,000.00 to the George and Rosa Young Endowed Scholarship Fund at the School of Medicine. Your generosity is deeply appreciated by all at the University, and especially by Dean Karen Antman.

As an alumna, you understand the vital role scholarship support plays as students complete their medical degrees. This scholarship bolsters the School's top priority of providing strong financial assistance to talented third and fourth year students, and will benefit students for generations to come. Your support is also a wonderful tribute to your parents.

Your steadfast dedication to your alma mater is most gratifying. Every best wish.

Most sincerely,

SGN/ks

cc: President Robert A. Brown
Dean Karen Antman

Reporting

Basics:

- Measureable updates on the performance of the gift – financials, recipients, etc

Enhancements:

- Tells a “story” that conveys the impact/ ROI /why it’s making a difference
- Puts a “face on the money”
- Engaging

<http://www.youtube.com/watch?v=gc15AoCkuBY>



Donor Recognition and Engagement

Basics:

- Action(s) taken to honor donor's individual gift or continued philanthropy
- Action(s) taken to promote or maintain a donor's connection to and involvement with the institution

Enhancements:

- Re-evaluate gift clubs, rosters
- Use web, media, new technology options
- Highly individualized and customized deliverables
- Strategic and integrated “touches”

Re-evaluate Gift/Recognition Societies

Campaign Recognition Societies (SDR Draft 2/11)

Lifetime \$1M Recognition

Donors who have given \$1M+ cumulatively to BU; permanent membership

Stewardship touches* managed by SDR

- Prominent identification as cohort through society-branded stationery, etc.
- Welcome letter from President
- Inclusion of donor philanthropic profile/BU impact report in \$1M society book
- Highlighted on donor recognition website
- Personalized URL for members to login to access their endowment reports, event calendars and customized communications
- Framed induction certificate/resolution
- Consider a dedicated, permanent donor wall and appropriate induction ceremony/biennial recognition event
- Receive regular "RAB insider" contacts: e-mails/articles/event invitations/calendars ("This Just In") – at least biannually
- Invited (when applicable) to volunteer/leadership board positions
- Access to a members-only concierge to help them navigate University services and receive VIP perks (DAR staff).

*TBD: which touches will be externally conveyed to donors as benefits

Claffin Recognition

Planned giving donors; permanent membership

- Certificate of Appreciation signed by President Brown
- Annual Spring Luncheon on campus
- Invitation to Sloane House for an afternoon with First Lady, Dr. Beverly A. Brown
- Invitation to select regional, alumni, and development events

Campaign Recognition

Coincides with highest pledge/gift during campaign timeframe – is fluid: donors can move up levels

Principal and Major Gift Recognition Stewardship touches managed by SDR

\$25,000,000; \$50,000,000; \$100,000,000 <tiers>

- Insider campaign communications on progress, program updates, etc.
- Meaningful gift/remembrance
- At minimum, additional recognition same as tiers below

\$10,000,000-\$24,999,999

- Highly personal and customized stewardship such as dinner with President and briefings by University leaders
- Public press release and/or donor profile
- Private dinner at Sloane House
- At minimum, additional recognition same as tiers below

\$5,000,000-\$9,999,999

- Public recognition at an annual dinner, i.e. in conjunction with a Trustee or DAB meeting
- Individualized stewardship plan
- At minimum, additional recognition same as \$1M tier, below

\$2,500,000-\$4,999,999

- At minimum, recognition same as \$1M tier, below

\$1,000,000-\$2,499,999

- Annual impact report on donor's philanthropy
- Customized campaign-specific gift
- Interview and BU press release (framed for donor)
- Recognition at events, i.e. VIP reception, campaign leadership dinners etc.
- \$1M Society level stewardship (see side panel)
- And all recognition listed below.

\$500,000-\$999,999

- At minimum, same as tier below

\$250,000-\$499,999

- At minimum, same as tier below

\$100,000-\$249,999

- Highlighted in campaign materials
- Campaign-specific gift (lapel pin, etc.)
- Invitations to selected campaign events
- Annual impact report (fund)
- Gift/pledge acknowledgements from President & Dean

Annual Giving Recognition (Including Annual Fund)

Mostly managed by Annual Giving and/or School/College Development Office

\$50,000-\$99,999

- All recognition listed below

\$25,000-\$49,999

- Acknowledged/welcome to society by President
- BU Annual report on campaign comes with RAB cover letter

- All additional recognition listed below

\$10,000-\$24,999

- Acknowledged/welcome to society by VP
- Invited to pre-reception for LGS event/regional AR
- All additional recognition listed below

\$5,000-\$9,999

- All recognition listed below

\$2,500-\$4,999

- All recognition listed below

\$1,000-\$2,499

- Listed in annual recognition materials
- Personal acknowledgement from Dean
- Invitation to LGS event/regional AR events
- Annual stewardship impact report

Permanent Campaign Recognition

- Permanent on-campus campaign display expected; details TBD, i.e. digital, wall, kiosk, etc.
- Plaques/dedications for individual naming recognition will be implemented at level appropriate to gift.

www.bu.edu/recognizes

- Donor Rosters
- Volunteer Rosters
- About Giving at BU
- Gift Impact Stories
- Contact Us

Boston University Stewardship & Donor Relations
BU Recognizes

Thank You, Donors & Volunteers

Welcome to BU's donor recognition website, devoted to our generous donors and volunteers.

The video below gives an overview of BU past and present—the strides we've taken and the promise we possess. We will continue to move forward, improving the University and our community, and know that we can't do it alone. Thank you to all those named on this site for your invaluable help and support.



- Recognizes
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- Volunteer Rosters
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Get connected @
www.bu.edu/alumni

Support BU
by making an online donation today

BU
by the numbers

From President Brown
"Boston University's donor-recognition website, BU Recognizes, serves two very important purposes."
"First, it recognizes and thanks those who

Donors: Keeping BU strong
Boston University is proud to honor our philanthropic leaders, all of whom make a difference with every dollar given to BU.
Donor support provides financial aid and

Volunteers: The gift of time
Gifts to BU take many shapes and forms, and many of our donors also generously gave of their time and expertise this year.
The various boards and councils that keep

- WHY GIVE
- TYPES OF GIFTS
- SCHOOLS & COLLEGES
- DONOR COMMUNITY
- CONTACT US
- DONATE NOW**



GIVING BACK, SEVEN DECADES LATER

What happens when a man like Chester Parasco (CLA '47, LAW '47), the son of an immigrant, receives a critical vote of confidence from a BU president?

- Why Give to BU?
- Choose To Be Great



PROVIDE OPPORTUNITY
An urgent priority, keeping BU affordable and accessible to all deserving students.



ADVANCE KNOWLEDGE
Increasing the scale and scope of BU's research, to help people live better lives.



ENHANCE STUDENT LIFE
Compelling experiences outside the classroom lead to a more engaged, more motivated, and



On September 21, 2012, BU launched its first-ever Campaign. With your help, BU can better support its brilliant faculty, provide for its diverse student body, and build its vibrant campus. [Learn more](#) about the campaign

www.bu.edu/campaign



Kilachand Honors College Celebration

Boston University | September 2011



The Campaign for Boston University

CHOOSE TO BE GREAT

September 21-22, 2012

The Campaign is Launched!

In September 2012, Boston University formally launched its first ever comprehensive capital Campaign-- with an overall goal of \$1 billion.

The following pages try to capture some of the energy and enthusiasm exhibited throughout the weekend's festivities. On Friday evening, SungEun Han-Andersen (CFA'85) and Richard Shipley (SMG'68, GSM'72) co-hosted a black-tie Gala for special BU alumni and friends who have already made key Campaign commitments. On Saturday morning, President Robert A. Brown hosted a Leadership Breakfast for members of the Deans', Athletics, and International Advisory Boards. The air of optimism and determination carried forward into Saturday night's "Celebration of BU," held in a transformed Agganis Arena, marking the official beginning of the Campaign's public phase.

This Campaign creates a new paradigm of philanthropy at BU. Thank you for joining in this important leap forward for this great institution.

Dream on...



Donor Stewardship Plans

Jennifer E. McGrath
Stewardship - Scholarship Stewardship Plan

Manager: [Maureen D. Donnelly](#) Total revenue: Start date: /11/2011 Site:

Plan stewards: [Maureen D. Donnelly](#) [Angela C. Mota](#) [Linda A. Ranz](#) Recent revenue: Active constituencies: Recognized donor [Donor](#) [Fundraiser](#) [Prospect](#) [Limit](#) Staff

Details: [Benefits and Interests](#) [Purposes](#) [Recognition Programs](#) [Stewards](#) [Documentation](#)

Narrative

Pending steps 5 [Edit all](#) [Add steps](#) [Step](#)

Category	Objective	Target date	Start time	End time	Time zone	Contact method	Assigned to	Associated plans	Template
Donor Recognition	certificate	8/1/2011							Endowed Scholarship
Annual Endowment Report	financials	10/1/2011							Endowed Scholarship
Annual Endowment Report	reap letter	1/1/2012							Endowed Scholarship
Scholarship Event	meet recipient	6/1/2012							Endowed Scholarship

Completed steps 5 [Add steps](#) [Step](#)

Category	Objective	Actual date	Start time	End time	Contact method	Assigned to	Associated plans	Template
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FY2007 STEWARDSHIP CALENDAR

Mr. John R. Donor 1978 ME (3.0)
Managing Partner
Shawmut Venture Capital
Boston, MA

Prospect Mgr: Brad R. Smith
Stewardship Mgr: Mike Dyer

Total commit: \$7,450,677
Last Trans: 09/22/2006 \$35,000.00 pledge to Shawmut UIROP Fund

Stewardship Packages
SP001 - UIROP 2007
SP004 - Professorships 2007

Actively Stewarded Funds
1159980 - Shawmut UIROP Fund
3454800 - Shawmut Professorship Fund
5422891 - Shawmut MITE25 Fund

July 2006	August 2006	September 2006
Annual report to donor on UIROP recipient (Biemer)		Profesship Dinner (Dyer)
October 2006	November 2006	December 2006
Profesship Dinner follow up from Susan Huxfield (Dyer)	Donor report from Dedic Carter with MITE25 final report and info on Shawmut Scholar (Rise)	Mid-year UIROP communication. Include save-the-date for MacVicar Day event (Biemer)
January 2007	February 2007	March 2007
	Send invite to MacVicar Day event (Biemer)	MacVicar Day event (Biemer) Send invite for Schol/UIROP event (Biemer)
		Send update on state of professorships at MIT (Dyer)
April 2007	May 2007	June 2007
Annual Schol/UIROP event (Biemer)		

= completed
 = Not Due
 = Unconfirmed

CONFIDENTIAL DOCUMENT
Please check after use

11/05/2006