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# All Stewardship is Local

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By *Nathalie Highland*

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A stewardship strategy for a nonprofit organization can be greatly affected by the location of the organization's constituency. Groups that have a primarily local membership—such as hospitals, food banks, arts and cultural organizations, and chapter organizations—have the advantage of being able to offer members a consistent suite of opportunities to engage throughout the year. For a nonprofit with a membership spread around the country, however, it may be difficult to offer the same types of stewardship across each giving level.

Regardless of the location of the membership, the primary goals of a donor relations program are universal: informing donors about how their money is being used, building relationships with the institution, and creating a framework for the next ask. The tools for achieving these goals vary, but they are based on the following core principles:

- All members, regardless of the size of their gift, should be thanked promptly and accurately;
- The giving level at which donors become a high priority must be defined and donors identified for appropriate handling;
- Meeting with donors and understanding their interests and priorities allow stewardship contacts to be more personalized and effective;
- Benefits should relate to the mission of the organization and be appropriate to the level of the gift.

All of these principles are important regardless of where the constituency is based.

The strategies to attract and retain donors will vary between organizations and be shaped by the nature of the constituency. It is essential to consider how the membership is distributed geographically when devising a stewardship program and use that to inform the strategies to use and the benefits to offer.

## Acting Locally

With a constituency centered geographically near the organization, a nonprofit can easily offer a concrete set of membership levels with benefits that are available to all. Many hold annual events to which all donors at a certain level are invited. Some organizations may offer a series of small gatherings with a more intimate feel. Those with active volunteer programs allow members to be actively engaged in the work of the organization. Some provide the option of attending the organization's annual meeting.

Opportunities to recognize and thank high-level donors in a public forum can be highly effective for cultivation and in motivating others to give. All of these programs rely on a certain number of supporters living near the institution in order to participate, and nonprofits with a local membership can offer an array of options appropriate to each giving level. Local constituencies also offer more opportunities to get to know

donors and connect them with staff members who will enhance their understanding of and investment in the organization.

## National Stewardship

For many organizations, it can be very difficult to offer the same benefits to each person at a particular giving level when the membership is distributed throughout the country. Invitations to an annual event may not mean much to donors 3,000 miles away, and won't have much impact as a benefit. Budget limitations may keep staff from being able to travel frequently and so limit the opportunities to build personal connections. It is important to assess the organization's strengths and devise a strategy that uses all available tools to keep donors connected and reminded of the unique value the institution offers.

When possible, offer in-person events appropriate to giving levels in areas of the country where there are high concentrations of members. If travel budgets are limited, look for opportunities to partner with staff already traveling or enlist volunteer leadership living in the region to maximize potential events. Such events need not be elaborate or costly—their most important value is in bringing members together to meet staff and learn about the work of the organization.

Phone conference calls and webinars are a great way to offer organizational contact to members

around the country with no travel cost and minimal overhead. Use these opportunities to highlight the work of key staff, introduce important new activities, report on recent accomplishments or for anything else in which the membership will be interested. A conference call offers members the chance to participate in an organizational event from their home or office.

Mail and email are both important means of sending regular messages that are not tied to a fundraising ask. Members should receive some contact from the organization throughout the year that doesn't involve asking for money. Informational mailings, thank-you cards at the holidays, and email updates on current news in the organization are all great touches. Consider enlisting key staff to contribute blog entries, host scheduled web chats or submit Twitter updates. Online tools are particularly cost-effective ways to reach members around the country.

### Measuring the Impact

It is often difficult to measure the success of cultivation activities. Other than fundraising events with specific goals, it can be difficult to tie a gift back to any particular stewardship method. Organizational leadership supportive of a qualitative approach to a donor relations program can alleviate some of this pressure. However, it is still useful to apply whatever metrics are available to assess the activities, in order to measure and grow the program over time. Consider tracking the number of invitations issued, RSVPs collected, and attendees

at a particular event. Each provides a marker of contact and interest. Keep a record of mailings and emails sent, and if systems allow, track open and click-through rates of email messages.

Whenever possible, offer donors the opportunity to send feedback to the leadership—not only will comments help in the evaluation of a specific activity, but donors value the opportunity to have their voice heard. It also can be helpful, particularly in the case of a national constituency, to evaluate all the contacts that donors receive at each giving level, and make sure that each member is receiving the appropriate level of cultivation. This can help surface those living in remote areas who are not offered the same in-person opportunities and provide the means to create a personalized strategy to cultivate them.

### Conclusion

Regardless of how the membership is distributed, it is essential to have a thoughtful, well-developed stewardship strategy that reflects the makeup of the membership and offers meaningful opportunities to engage in the work, learn how gifts are being used and reinforce the mission of the organization. Whatever the resources available, it is essential that the donor be offered opportunities to learn about how the gift has been used and how the organization makes a difference.

In developing a stewardship plan, seek partners throughout the organization—front line fundraisers, program staff, board members and volunteers—who can help advance

stewardship goals and raise the profile of the organization. The key to donor relations is creating donor interactions at a level appropriate to individual giving and fostering deepened connections and loyalty. An effective donor relations officer will seek to provide to all supporters that high-quality experience that is local to *them*, regardless of where they live. ■ NCDC

*Nathalie Highland has served on the Board of the Association of Donor Relations Professionals (ADRP) since 2006 and has presented several times at the ADRP International Conference as well as the Southeast Donor Relations Conference. She currently chairs the ADRP Member Relations Committee and serves on the Governance Committee. She is also Deputy Director of Development at the Union of Concerned Scientists, where she seeks to build a community of donors through strategic cultivation and stewardship strategies.*



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