

The Many Faces of Stewardship –

*Do you do the same thing for annual donors compared to major gift donors?
What about planned giving donors?*

Moderated by:

Barbara Belt, Assistant Director of Annual Giving & Advancement Services
University of Pennsylvania

Wednesday, July 31, 2019 1:30pm

Penn Vet's Stewardship Program

Annual and Major Donors

Annual Acknowledgement plan – based on giving level. (Excel sheet describing our stewardship touch points)

Annual Report to Donors – Calendar for Friends and Alumni (\$15k to create, raises \$50k)

Bellwether Magazine – Fall and Spring

1884 Circle of Friends – campaign stewardship based on years of giving

- 3 tiers tied to years of giving, Animal Lovers, Silver and Gold
- Featured in Annual Report to Donors (Calendar), School Magazine and on the back of all annual giving appeals
- New this year: sending a keychain to each donor (bring samples and packaging)

Acknowledgement Letters

Weekly Acknowledgment Assignments (color coded weekly spreadsheet which assigns each gift to a template and a staffer who creates the thank you using the template)

- Personalized letters for major donors (\$25K + receive letter from Penn's President)
- Template letters for mid-range
- Postcard templates for under \$100 donors
- Fans of Barbaro receive special messaging throughout the year

Impact Reports for Ryan Hospital, New Bolton Center, Friends of Penn Vet, and Alumni (repurposed material from Calendar)

Endowment Reports

20th Anniversary of Opportunity Scholarship program. Report celebrates the founder, donors, mentors and recipients alike.

Endowed Scholarships – donors receive annual report with cover letter

FIRST TIME DONORS

First time donors to Penn Vet receive:

- the Bellwether magazine
- a calendar with a letter explaining their name will be included next year
- at the end of the fiscal year, a keychain welcoming them to the 1884 Circle of Friends

MAJOR DONORS

Highly personalized stewardship designed by Prospect Manager including:

- Signage
- Meetings with the Dean and/or Faculty
- Invitations to Major Donor Events/Receptions

Thank you pieces include:

- Insulated water bottle
- Personalized wool blanket
- Silk scarf or tie
- Cross Pen for gift agreement

Planned Giving

University wide PG recognition/Vet Heritage Society
Personalized Donor Visits

Additional ideas from group discussion:

Pet Memorial Program at Penn Vet
Student thank you notes
Student thank a donor day

Sample Postcard Message:

We are truly grateful for your recent gift.

Your gift to the Friends of New Bolton Center gives back to the animals that we love and cherish, and our world class compassionate care is possible only because of contributions like yours.

By working together we can maximize **The Power of Penn Vet**, and we thank you again for your generosity that makes great things possible.

With gratitude,

Andrew M. Hoffman, DVM, DVSc, DACVIM
The Gilbert S. Kahn Dean of Veterinary Medicine