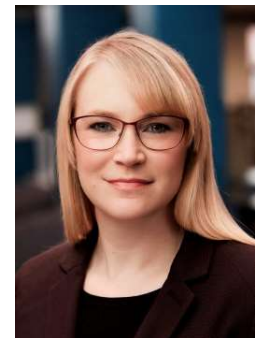


BECOME A DONOR STEWARDSHIP SAMURAI

SECRET WEAPONS FOR RETENTION, RENEWAL, AND RISING RETURNS

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Stewardship

A key component to donor-centric, relational fundraising



The purpose is
two-fold:

PRACTICAL

ALTRUISTIC



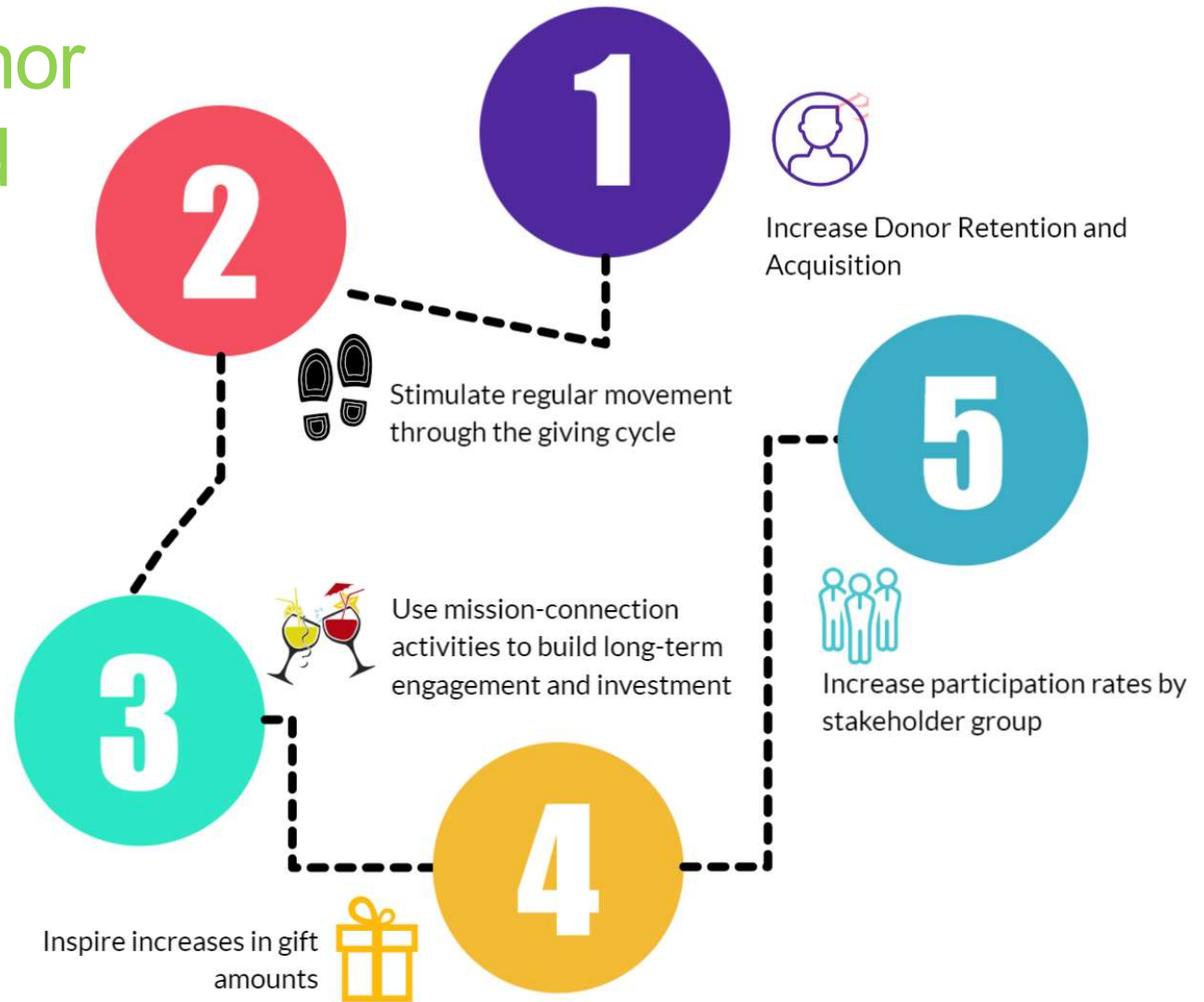
Definitions according to the Association of Donor Relations Professionals

Stewardship	Donor Relations
Historically: the safeguarding of assets. You don't steward donors. You steward gifts.	A comprehensive effort to ensure high quality donor interactions to foster long-term engagement and investment
Ensuring funds are utilized as the donor intended and conveyed in gift agreements and fund terms.	This can encompass stewardship. In some shops the two functions are separated.
Includes gift acceptance, management and acknowledgement.	Includes donor recognition and communication. Gift reporting to the donor may sit in either category.



Goals for Donor Relations and Stewardship

How do we measure value?

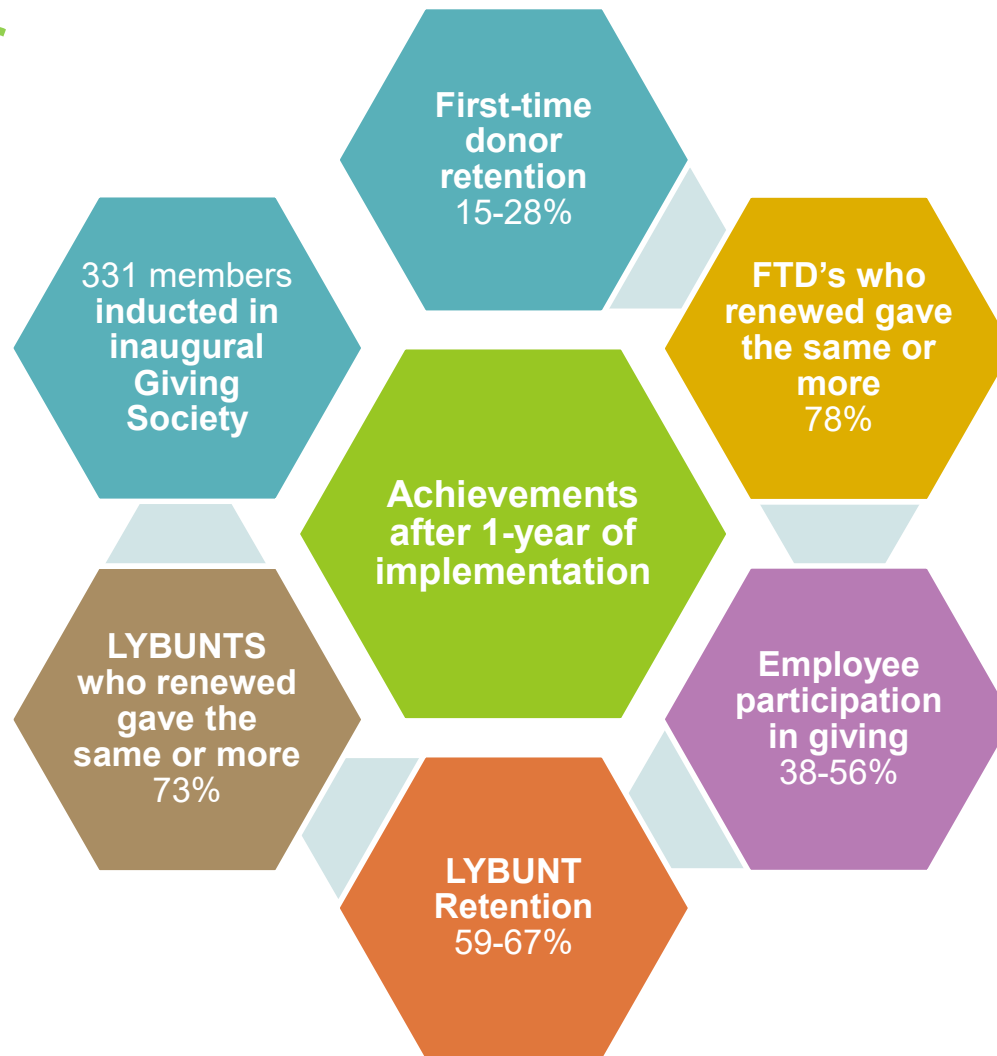


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Goals for Donor Relations and Stewardship

How do we measure value?



Why donors lapse

From Building Donor Loyalty by Adrian Sargeant and Elain Jay

Totals will equal greater than 100% because those surveyed could offer more than one answer.

Reason	United States
I can no longer afford to offer my support	54.0%
I feel that other causes are more deserving	36.2
Death/ relocation	16.0
My support was not acknowledged	13.2
No memory of having supported	11.1
I was not informed how my money was used	8.1
My support is no longer needed	5.6
I was provided with poor support	5.1
I was asked for inappropriate sums	4.3
I found communications inappropriate	3.8
I am still supporting by other means	3.4
My wishes were not honored	2.6
Staff were unhelpful	2.1
I was not reminded to give again	0



6 Steps to Structuring a Super-Star Stewardship Program

1. Communications
2. Ethical Management
3. Recognition
4. Inquiry
5. Education
6. Events and Initiatives



1. Communications

*The Purpose:
Relationships*



2. Ethical Management

The Purpose: Trust

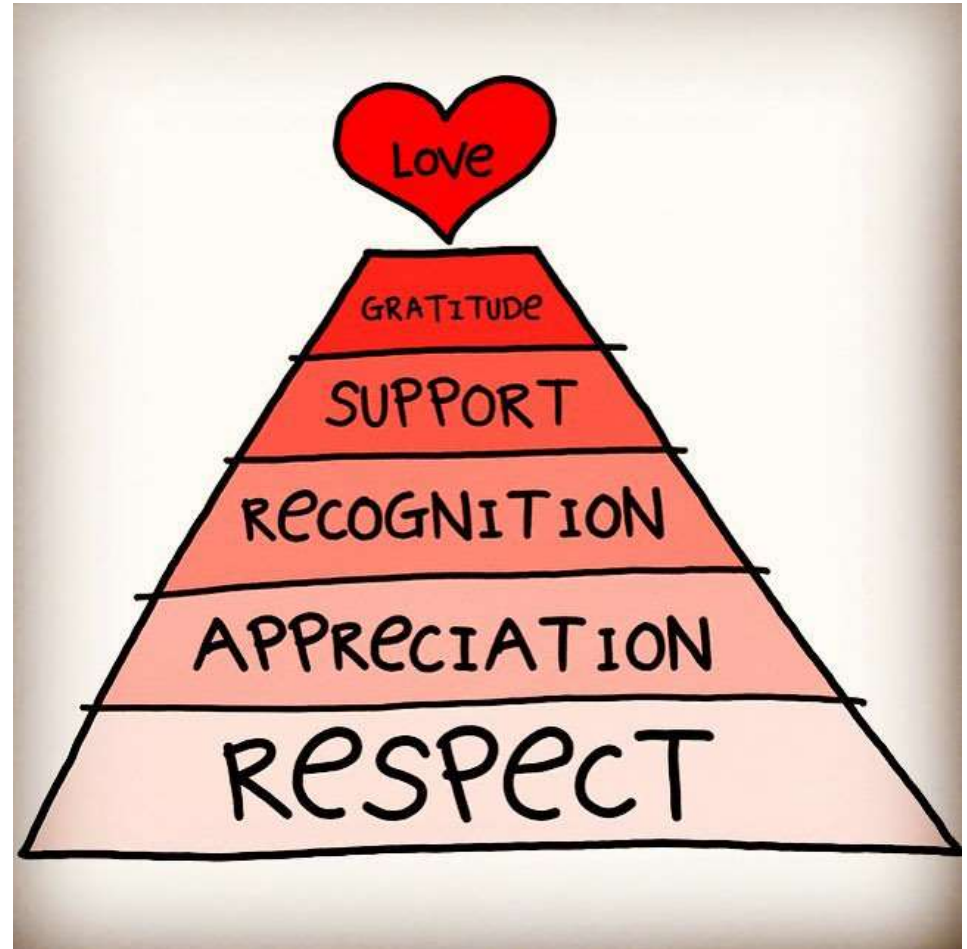


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3. Recognition

*The Purpose:
Appreciation*



4. Inquiry

The Purpose: Inclusion



5. Education

The Purpose: Clarification



5. Education

The Tactics

Ask yourself key questions to determine if you need to build up your educational arsenal:

- Why do people give to your organization?
- What do donations pay for?
- How does your mission impact the community/ the world?
- How can charitable giving help the donor financially?
- What can they contribute to?
- Can they give something other than money?
- What are the parameters or limitations and why?



6. Events & Initiatives

The Purpose: Connection



Make a PLAN. Make it Holistic. Measure it. Adjust.

CASE.ORG:

- Search “stewardship” or “donor relations”
- Resources/ Fundraising Fundamentals
 - #7: Donor Cultivation/ Stewardship Activities

AFPGLOBAL.ORG

- Tools and resources/ hot topics
- Fundraising dictionary
- Tools and Templates/ sample documents

PHILANTHROPY.IUPUI.EDU

- Research Archive (stewardship)

ADRP.NET

- Research

JOURNALDRS.COM



This Donor Relations and Stewardship Model

relies on all six components to reap the maximum benefit for the donor and the mission.

