Sharing the Secret Sauce!

How Successful Stewardship Leads to Principal Gifts

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Director of Principal Gift Stewardship
Creighton University

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Executive Director of Development
The University of North Carolina at Greensboro
Bryan School of Business and Economics

Theresa Hancock
Director of Donor Relations
The University of North Carolina at Greensboro
Group Exercise

Total Time: 5 Minutes

Pick a partner and address the following:

- Think about a time when you made a personal donation to a charity or organization that you cared about.
- What was the best part of the experience?
- How did you feel?
- What made you feel that way?
What is the WHY?
“They may forget what you said - but they will never forget how you made them feel.”

~Carl W. Buehner
Introductions…

Paige Amick
Director of Principal Gifts Stewardship
Creighton University (Nebraska)

Mary Ellen Boelhower
Executive Director of Development
University of North Carolina Greensboro

Theresa Hancock
Director of Donor Relations
University of North Carolina Greensboro
Today’s Session

- What is stewardship?
- Tapping into the secret sauce
- Real-life examples
- Interaction from participants…
  We want to hear your ideas and success stories!
- Resources and tools
- Questions
Stewardship Basics

- Meaningful Gift Acknowledgements
- Accurate Fund Reporting
- Demonstrating Impact
- Recognition
- Engagement
What is the “Secret Sauce”? 

**se-cret sauce**

*noun*

a *special* technique that when applied consistently results in a great sense of satisfaction for donors and causes them to want to do more for your institution.
Gift Acknowledgements

You want donors to know that their gift was noticed and appreciated!

- Tax receipts vs. thank-you letters
- Make it personal
  - Phone call or email as soon as possible after gift is received
  - Personalized letters from leadership, including top volunteers
- The “Rule of Seven”
  - 7 expressions of thanks before asking again
  - Consider a re-thank-you in 6 months to update donor on impact of gift
Applying the Secret Sauce

Custom Donor Thank You Cookies
Applying the Secret Sauce

Custom Donor Thank You Cards
Accurate Fund Reporting

Goal is to build trust so that the donors want to have a continued relationship with your organization.

- Complete transparency is vital

- Donors should be treated like investors
  - If the program was successful and you demonstrate ROI, the donors are likely to invest again.
  - If the program was not successful but you tell the donors why, the donors are likely to invest again.
Applying the Secret Sauce

Institutional Endowment Reports
UNCG
Demonstrating Impact

How have they made a difference?

- Institutional endowment reports
- Personal meetings with students/faculty
- Customized impact reports
Applying the Secret Sauce

Custom Impact Reports
UNCG
Applying the Secret Sauce

Custom Impact Visual: International Study University of New Hampshire
Recognition

**Remember to take into account donor preferences, culture and values**

- Public recognition of philanthropy
  - Honor rolls
  - Giving societies/events
  - Donor walls
Applying the Secret Sauce

Business School Donor Wall
UNCG

Thank you!

Your generosity transforms lives and inspires others. Students, faculty, staff, and countless visitors will see the full-size version of this plaque in the Bryan Building and be reminded of your lasting support. Thank you for making a difference for Bryan School students through the gift of education.
Applying the Secret Sauce

Customized Research Poster Presentation and Reception
Creighton University
Recognition

**Remember to take into account donor preferences, culture and values**

- Public recognition of achievements
  - Nominations for awards (university and community)
  - Acknowledgment of awards received from outside of your institution (professional, etc.)

  Let them know you noticed!
Applying the Secret Sauce

Alumni of Distinction Awards
UNCG
Engagement

- Look for opportunities to deepen the relationship:
  - Boards/Committees
  - Phone calls from President, Dean, CEO, etc.
  - Speaking/event participation
  - Student mentoring
  - Personalized visits to institution
  - VIP exclusive access
  - Hands-on experiences in the donor’s area of interest and investment
Finding the Ingredients

Goal: Show them you care about them – beyond your institution

- Know your donor
- Look for meaningful opportunities for touches
  - Birthdays (especially milestone ones)
  - Anniversaries (marriage, years of giving)
  - Births, graduations, accomplishments of children
  - Illness, deaths of family members
- Make it about the donor – not the institution
Applying the Secret Sauce

Milestone Birthdays
UNH & UNCG

whereas, Patricia Gibson Baker was born on March 7, 1942, sharing a birth year with Ava Gardner and Judy Garland; and whereas, she graduated from the University of New Hampshire in 1963; and whereas, Pat married the love of her life, Dr. John M. Baker on July 27, 1946; and whereas, she and Jack raised four children, Sally, David, Jonathan, and Stephen; and whereas, Tiffany’s Table Manners for Teenagers and Elements of Style were required reading for all of Pat’s children; and whereas, dedication to her family was unsurpassed, always wanting the best and setting the bar high; and whereas, she traveled west to raise a family but never really left New Hampshire; and whereas, Pat’s life spans nine decades of history and Wikipedia material including King George V opening a new tennis stadium at Wimbledon, the first summiting of Everest, the Great Depression, and Facebook; and whereas, Pat is widely known for her poise, grace, beauty, and sophistication; and whereas, she is one of the original Incorporators of the University of New Hampshire Foundation, Inc.; and whereas, she has been celebrated by the University for her service and philanthropy through the Alumni Meritorious Service Award and the Foundation’s Volunteer of the Year Award; and whereas, a classroom will be named in her honor in the new business school; and whereas, Pat will celebrate this glorious day with family and friends on March 10, 2012; now, therefore, I, Mark W. Huddleston, President of the University of New Hampshire, do hereby quietly congratulate Mrs. Pat Baker on the diamond anniversary of her 75th birthday.

Mark W. Huddleston
President, University of New Hampshire
Know Your Donor

Donor:                      Birthdate:          Class year:
Name of spouse:             Birthdate:          Class year:
Name(s) and ages of kids:   Birthdate:          Class year:
Name(s) and ages of grandkids:  Anniversary:
Name(s) and types of pets:

Milestone dates:
Years of giving (and what year they will reach a milestone year)
Date endowment first established (and what year it will reach a milestone year)

Key questions:
1. What is his/her “story” (background, how he/she chose/got involved with your institution)?
2. Does he/she like to give gifts?
3. What other organizations/causes is he/she involved with?
4. How does he/she choose to spend their free time?
5. What is his/her passion?
6. Who are his/her closest peers?
7. Who is his/her favorite person at your institution?
8. What are their food/drink likes/dislikes?
9. How does he/she want to be remembered?
10. If he/she could do anything for your institution or humanity, what would it be? Why?
**Individual Stewardship Plan Example**

**Creighton University – Custom Stewardship Plan – James K. & Linda O. Donor #39878 / #231808 | FY2018**

### Donor Information

<table>
<thead>
<tr>
<th>Donor Name(s): James K. Donor/Linda O. Donor</th>
<th>Main Areas Supported: School of Dentistry – specifically student scholarships, faculty development, and capital. Dr. Donor has not cited capital as a priority, but provided support, so this was identified as an SOD greatest need project.</th>
<th>Notes/Action Items:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address: 1234 Philanthropic Way Manhattan, KS 66503-8692 Phone: xxx-xxx-xxxx – H, Pref</td>
<td></td>
<td><em>Determine Linda’s DOB</em></td>
</tr>
<tr>
<td>Entity ID 1: James K. Donor, DDS (#39878) – Class of 1980</td>
<td>Entity ID 2: Linda O. Donor (#231808), KSU grad</td>
<td><em>Determine wedding anniversary date</em></td>
</tr>
<tr>
<td>Birthday(s): 1/28/55; (4) <em>TBD</em></td>
<td>Main Areas of Interest: School of Dentistry Capital Campaign (CDONTOTHSDNT) Dentistry AAB Student Engagement (CONTOTHALUM)</td>
<td></td>
</tr>
<tr>
<td>Milestones: Donor Memorial Endowed (ECBASFABONG)</td>
<td>Primary Manager: Courtney A. Bauer</td>
<td></td>
</tr>
<tr>
<td>Anniversary: School of Dentistry (DUHT)</td>
<td>Planned Giving Manager: Robert Meydak</td>
<td></td>
</tr>
<tr>
<td>Other: Revocable Bequest</td>
<td>Hobbies: Art, traveling, KSU football</td>
<td></td>
</tr>
</tbody>
</table>

### Campaign Strategy Information

| Campaign Planning Feedback: *TBD* | Campaign Opportunities: *TBD* |

### Strategies to Research: *TBD*

Is Dr. Donor a potential member for the SOD Advisory Board?

Possible Gift(s): As a top donor, possible gift would be rough-cut bookends cut from the extra limestone for personal bookcases to compliment a love of reading.

### Key Events & Dates (decision dates, proposal dates, Board Meetings, personal, etc.)

- Leo V. Donor, DDS, DDS’45, DDS’48 (Father) DOD: 10/12/2010
- Margaret Stanback Donor, BSC’43 (Mother) DOD: 07/25/2005
- Parent’s 75th wedding anniversary milestone – 05/17/1943

### Campaign Stewardship Strategy

<table>
<thead>
<tr>
<th>Ideas</th>
<th>Projected Date</th>
<th>Primary Lead</th>
<th>Objective</th>
</tr>
</thead>
</table>
| Option 1: Curate an exhibition of the gifted artwork in the Lied Art Gallery on campus. Coordinate a show and opening for the Creighton community | Q3 – FY19 | Courtney Bauer/ Paige Amick, Jess Benjamin, Lied Gallery Director – CU | Demonstrate gratitude and impact of the gift of art – possible focus on the Gaylord Sali works.
Individual Stewardship Plan Example

**Option 2:** As above coordinate jointly with Benedictine College

<table>
<thead>
<tr>
<th>Reports</th>
<th>Event Invitations</th>
<th>Communications / “Other”</th>
</tr>
</thead>
<tbody>
<tr>
<td>X Financial Endowment Report (fall)</td>
<td>Founder’s Week Activities</td>
<td>X VP or President Birthday Card</td>
</tr>
<tr>
<td>Custom Report (fall)</td>
<td>X Scholarship Luncheon</td>
<td>X VP or President Holiday Card</td>
</tr>
<tr>
<td>X Scholarship/Professorship Recipient Letters</td>
<td>Donor Appreciation Reception</td>
<td>X PG Holiday Gift</td>
</tr>
<tr>
<td>Lifetime Giving Impact Report</td>
<td>X Scholar’s Luncheon/Dinner (if applicable)</td>
<td>X Campaign Updates</td>
</tr>
<tr>
<td>X President’s Report</td>
<td>X Dean Latta Invite – SOD Lectures, etc.</td>
<td>X Year in Review (print and/or digital)</td>
</tr>
<tr>
<td>X Dean’s Report</td>
<td></td>
<td>X Campus Visit(s)</td>
</tr>
<tr>
<td>X Impact Report(s)</td>
<td></td>
<td>X Personal call from Father Hendrickson</td>
</tr>
</tbody>
</table>

**Scholar’s Luncheon/Dinner:** Consider PG model for focused interaction between donors and current students of the Margaret Stanoshek Donor Memorial Endowed Scholarship.

<table>
<thead>
<tr>
<th>Q3 or Q4 – FY19</th>
<th>Paigee Amick</th>
<th>Cortney Bauer</th>
</tr>
</thead>
</table>

Two colleges coming together to jointly celebrate the generosity and impact of the donated art collections...possibly celebrate two (2) openings/shows over two campuses.

**Scholar’s Luncheon/Dinner:** Bring together the Donor and their scholarship students for a focused engagement opportunity to deepen those relationships.

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**Standard Donor Engagement and Stewardship**

**Customized Engagement Plan**

<table>
<thead>
<tr>
<th>Date</th>
<th>Opportunity</th>
<th>Action</th>
<th>Responsible Person or Team</th>
<th>Expected Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1 – July</td>
<td>July 4th Greetings from Creighton University SOD photos as a visual update to the May 2017 campus visit to sign the beam.</td>
<td>Email sent to Heritage Society members</td>
<td>Rosey Higgs</td>
<td>Donor touch to keep Heritage Society members connected to the university</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Send pictures of the beam signing to be placed in the new SOD building</td>
<td>Cortney Bauer</td>
<td>Help build excitement for the SOD capital project</td>
</tr>
</tbody>
</table>

CONFIDENTIAL – STEWARDSHIP PLAN
Individual Stewardship Plan Example

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Activity Description</th>
<th>Name(s)</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1 - August</td>
<td>2017 Creighton Society/Heritage Society Mass and Dinner – Saturday, August 26, 2017</td>
<td>Rosey Higgins, Cortney Bauer, Robert Skydas</td>
<td>Continue to keep the Donor involved in activities associated with the Heritage Society.</td>
</tr>
<tr>
<td>Q1 - September</td>
<td>2017 HW SOD Donor Dinner – Thursday, September 14, 2017</td>
<td>Rosey Higgins, Kelly Ptacek, DR Team</td>
<td>Continue to keep the Donor connected to the SOD as significant donors.</td>
</tr>
<tr>
<td>Q2 - October</td>
<td>Outreach from Dr. Latta to honor the Donor by displaying several pieces of their gifted art in the new SOD.</td>
<td>Personal email from Dr. Latta, Dean Latta, Cortney Bauer</td>
<td>Help the Donor to feel honored by both their capital gift to the SOD and their previous gift of artwork to CU.</td>
</tr>
<tr>
<td>Q2 - November</td>
<td>FY17 Stewardship Report</td>
<td>Zach Pierce</td>
<td>Provide responsible stewardship and keep the Donor connected through the annual update.</td>
</tr>
<tr>
<td></td>
<td>PG Donor Thanksgiving Card (2017) Office of the President (2018-forward) VPUR</td>
<td>Fr. Hendrickson (DSH), Matt Gerard, Paige Amick</td>
<td>Utilize the season of Thanksgiving to extend thanks and gratitude with a custom annual card. The 2017 version was a 3D popup cornucopia with a message and poem from the Office of the President. The goal is for 2018 to be sent from the VPUR.</td>
</tr>
<tr>
<td>Q2 - December</td>
<td>Holiday Cards <em>(religious option)</em> (Development; Office of the President)</td>
<td>Fr. Hendrickson (DSH), Cortney Bauer</td>
<td>Remember the Donor during the holidays with religious cards – focus on the importance of their Catholic faith.</td>
</tr>
</tbody>
</table>
## Individual Stewardship Plan Example

**Creighton University – Custom Stewardship Plan – James K. & Linda O. Donor #39878 / #231808 | FY2018**

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<tr>
<td>Q3 - January</td>
<td>Birthday Card – Jim (DGJ: 1/28/55) (Development; Office of the President)</td>
<td>Send out Birthday Card</td>
<td>Fr. Hendrickson (DSH) Cortney Bauer</td>
<td>Remind Dr. Donor of his connection to the Creighton family – i.e. families remember birthdays.</td>
</tr>
<tr>
<td></td>
<td>2016-2017 Year in Review – share news and accomplishments of CU</td>
<td>Year in Review mailed out to PG Donor Base with personal note from VPUR</td>
<td>Matt Gerard Paige Amick</td>
<td>Keep the Donor informed and engaged in CU pride points.</td>
</tr>
<tr>
<td>Q3 - February</td>
<td>Feature the Donor in the Creighton Alumni Dental magazine – publication in February.</td>
<td>Engage the Donor in a discussion regarding a donor feature article featuring answers to six (6) key questions.</td>
<td>Cindy McMahon (UCOM) Cortney Bauer Dean Latta</td>
<td>Show appreciation to the Donor for their generous gift to the SOD. Also, we hope that this article and their gift will inspire other alumni donors.</td>
</tr>
<tr>
<td></td>
<td><em>There is a possibility of presenting the Donor with a special “first edition” of the publication signed by Dean Latta and other important SOD faculty and staff.</em></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Happy Valentine’s Card &amp; Video</td>
<td>Send 2018 Valentine’s card and video link</td>
<td>Nichole Jelinek Cortney Bauer</td>
<td>Opt-in to include the Donor in a non-traditional holiday touch.</td>
</tr>
<tr>
<td>Q3 - March</td>
<td>Save the Dates for Fall 2018 SOD activities:</td>
<td>Send Save the Date Information</td>
<td>Paige Amick Sarah Schmitt</td>
<td>Encourage the Donor to return to campus for the fall events.</td>
</tr>
<tr>
<td></td>
<td>Dent Donor Dinner &amp; Cocktails Ribbon Cutting Celebration</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Saint John’s Bible in-depth exploration to focus on the Donor’s Catholic faith and connection to sacred art...series launch in Feb 2018</td>
<td>Share link for Creighton and the Saint John’s Bible video series: Watch the first video.</td>
<td>Cortney Bauer</td>
<td>“Lighting the Word” will help to solidify the Donor to Creighton’s Jesuit mission.</td>
</tr>
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## Individual Stewardship Plan Example

### Creighton University – Custom Stewardship Plan – James K. & Linda O. Donor #39878 / #231808 | FY2018

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<td><strong>Q4 - April</strong></td>
<td>Opportunity to deepen the relationship with CU through personal Jesuit interactions.</td>
<td>Personal phone call or visit from Father Hendrickson or Father Merkel.</td>
<td>Paige Amick Cortney Bauer Lori Vander Millen</td>
<td>Move the relationship between Father Hendrickson and the Donor or introduce Father Merkel as a “Jesuit of interest” into their circle. Move the relationship with the Jesuit Community and/or Fr. Hendrickson to the next level.</td>
</tr>
<tr>
<td><strong>Q4 - May</strong></td>
<td>Invites for Fall 2018 SOD activities: Dent Donor Dinner &amp; Cocktails Ribbon Cutting Celebration</td>
<td>Send Invites for fall SOD events information</td>
<td>Paige Amick Sarah Schmitt</td>
<td>Encourage the Donor to return to campus for the fall events.</td>
</tr>
<tr>
<td><strong>Q4 - June</strong></td>
<td>Parents: Dr. Leo V. Donor, B5 ’46, D06 ’48 Mrs. Margaret K. Donor, B5 ’43 75th Wedding Anniversary “Diamond Jubilee” Remembrance Married June 17, 1943 St. John’s Church – CU campus “They both lived to see 62 years of marriage”</td>
<td>Celebration Mass in St. John’s Church coordinated through Fr. Snow to recognize 75th wedding anniversary – special invitation to the Bonger family (i.e. Jim’s siblings and their families) Create special invite, mass cards and gift – reference to diamond jubilee.</td>
<td>Paige Amick Cortney Bauer Fr. Snow Fr. Merkel</td>
<td>Although Dr. Bonger’s parents are both deceased, 2018 marks the 75th Anniversary of their marriage at St. John’s Church. Recognition of this milestone is important to celebrate the Bonger family.</td>
</tr>
</tbody>
</table>
Applying the Secret Sauce: Case Study
Applying the Secret Sauce

Other examples…

DO YOU HAVE A SUCCESS STORY?
Questions?
Recommended Resources

- Journal of Donor Relations & Stewardship
- The 4 Pillars of Donor Relations
- Donor Centered Fundraising
- Intentional Stewardship
- Building Donor Loyalty
- Keep Your Donors
- The Road to Character
**Bio: Mary Ellen Boelhower**, Executive Director of Development, has served as chief fundraiser for the Bryan School of Business and Economics since 2003. She has raised millions over the course of her career, impacting hundreds of students through scholarships, faculty support and special programs. Prior to UNCG, Mary Ellen was the inaugural Director of Stewardship at the University of New Hampshire. In 2015, she was honored with the Triad Business Journal's "Women in Business" award. She has a B.S. from the University of Louisiana at Lafayette (her home state) and a M.S. from the University of New Hampshire. me_boelhower@uncg.edu; 336.256.0372

**Bio: Theresa Hancock**, Director of Donor Relations, has served UNC Greensboro for over 11 years. Currently, she is responsible for donor engagement, stewardship and advancement communications. Prior to UNCG, Theresa had a long sales career and was the Circulation Director for Triad Business News. She has a BS in Accounting from UNC Wilmington and an MA in Communication Studies from UNC Greensboro. In addition, she serves on the Triad-area Alumni Association for UNCW. tmhancoc@uncg.edu; 336.256.1050

**Bio: Paige Amick**, BS, MPA, is the Director of Principal Gifts Stewardship for Creighton University. With over 11 years in the area of development, her primary focus has been on donor relations and stewardship within higher education. Before her tenure at Creighton, she honed her skills in donor relations and stewardship first at the University of New Hampshire and then at North Carolina Agricultural and Technical State University. In her current role, she serves as the primary point of contact for all $1M donors across 9 schools and colleges. paigeamick@creighton.edu; 402.280.4272