In This Chapter

- The role of stewardship in your Annual giving program
- Delivering timely and appropriate acknowledgement and recognition
- Building in accountability
- Creating experiences of the impact and outcomes of your work
- Engaging others in delivering stewardship to your donors

Steps included:

Step 1 — Deliver timely acknowledgements
Step 2 — Provide meaningful and appropriate recognition
Step 3 — Create an inventory of stewardship messages and collateral
Step 4 — Implement tailored, personalized stewardship for the Critical Few
Step 5 — Building a culture of philanthropy by involving others
Overview

Stewardship is second only to artfully asking for an investment in Health Rocks in terms of achieving fund development SUCCESS! By making a commitment to planning and delivering top-quality stewardship, you are ensuring that your program will successfully:

- Attract new donors—Today’s donors want to know up-front: “How will I be treated?”, “Can I trust this organization?”, “Will my gift have an impact?” By delivering regular stewardship messages to all your donors you will build strong trust as you deliver on your promise of “donor and philanthropic investment” care.

- Strengthen volunteer and staff engagement—By delivering outstanding stewardship to donors and volunteers, and by enrolling volunteers and your Health Rocks team in stewardship activities, everyone will feel great about their fundraising responsibilities—and will be eager for more.

- Increase donor retention—It costs four to eleven times as much to acquire a new donor than to keep an existing donor. Filling the pipeline with the right donors and inspiring them at the right levels is the most painstaking work you’ll do. Stewardship and donor care makes all that work much easier!

Remember the Donor Cycle: it starts with stewardship—it doesn’t just end with it. Those you anticipate giving significantly to your program in the future are probably those who are current or lapsed donors to 4-H or to Health Rocks right now. By building in these processes and plans now, you’ll help ensure that everyone receives great care from the beginning. And, let’s be real: once you’re on-the-ground fundraising actively for your program, you’re not going to have time to be thinking through and building a new plan then.

- Increase giving—Stewardship inspires increased giving from current donors; increases donor retention of first time donors (those donors least likely to renew); invites back lapsed donors.

- Create viral marketing—The philanthropic community is small and tight in almost all communities; great stewardship is shared.

- Lead to major gifts—Research shows that almost all major donors began their relationship by giving a relatively small gift. GREAT stewardship keeps and engages those donors who have GREAT potential.

REALITY CHECK:

Since we’re just getting started and we don’t need to be generating our own funding in any significant way for a few years, isn’t this something I can wait to build later on? Why do I need a stewardship plan now when I have barely any donors?

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Your plan should incorporate all four pillars of great stewardship:

1. Acknowledgements that are timely, remind donors of the work their gift will be put to work to do, provide needed tax information and contact information if there are questions.

2. Recognition that is appropriate to the size of the gift, “equal” to others gifts (i.e. an individual gift of $5,000 receives recognition “on par” with a corporate gift of the same size, or a gift given through an event gets commensurate recognition as a gift given through a mail appeal or face-to-face.

3. Accountability is provided to all donors, funds are carefully managed and the highest impact outcomes are sought through the program—you manage and spend wisely and you achieve big outcomes.

4. Every donor is provided the opportunity to experience the impact and outcomes of their giving. Ideally, every donor gets to do this in person; but when that is not possible or not desired, donors proactively receive messages and materials from you that “bring alive” how their gift was used and why that matters to achieve the outstanding results that the Health Rocks program delivers.

**Step-by-Step Actions**

These Step-by-Step Actions are designed to help walk you through the Stewardship Plan template that accompanies this chapter. The plan also has some initial ideas in it to stimulate your thinking; however, you should build the right, workable stewardship plan for your program, your staffing situation and your donors.

**Step One—Deliver Timely Acknowledgements**

1. Start by downloading and reviewing the Acknowledgement Protocols included with this chapter. For some, you’ll already have this process in place; it works fine and may need only minor tweaks or revisions around the edges. For others, you’re building this process from scratch. Read on. If you are building from the ground up, simplify, simplify, simplify. Determine who will sign your acknowledgment letters, who will produce them and who will check them. Ideally, this involves at least two people—but be sure that these are two people who work together regularly so your system doesn’t get slowed down by waiting to reconnect “at the next meeting”.

2. Ensure that you have a quality database, at least something more robust than Excel, a process for entering data and a way to generate mail merged acknowledgement letters.

3. Draft your letter that reminds donors of the impact of your program, how they can seek more information about their gift or taking a next step with you. This letter is your best chance for a quality first impression. Ensure that it well-written, professionally formatted on the page in a block business style, but also betrays warmth and connection to the community of partners—volunteers and donors—who make Health Rocks possible.
4. Review the Acknowledgement Protocols and the suggestions made on the Stewardship Plan template: are there enhancements to your acknowledgement system that you could feasibly add? Many find that adding in a phone call—either as the gift first arrives (particularly if you’re having real difficulty getting acknowledgement letters out) or within the month it was given is a terrific, unexpected “value-added” step that solidifies your relationship with the donor. Consider this as a great, accessible way to engage volunteers or others on the program team: having people sign up to be “on-point” for thank you calls on a rotating monthly schedule ensures that you’ve always got people available, but doesn’t place a heavy burden on any single person.

2. As a complement to a donor listing—or as a replacement for it—you may want to host an annual donor recognition event. Often local businesses will provide a venue, food and drink for these events gratis, in exchange for tasteful recognition at the event. (Consider it from their standpoint: donors are also customers with money. Being a good corporate citizen in front of these potential customers makes great business sense.) At this event, you may want to publish a “program” which serves as your donor list. The benefit of a donor recognition event is that you can also deliver some powerful impact and outcomes messages and accountability information, enable people to interact with your implementation teams, meet your youth leadership, maybe even participate in some of the activities in your program. One word of caution: as powerful as a donor recognition event is to get a lot of things done at once, it is only as powerful as those attending. Remember to capture—in pictures, through the program, by transcribing remarks—the essence of the event and send it as a follow-up step to all those donors who can’t or don’t attend.

Step Two—Provide Meaningful and Appropriate Recognition

1. At a minimum, you’ll need to provide all your donors with some recognition each year. Most choose to do that by printing an annual donor report as a separate publication or as a part of their pre-existing newsletter. Others are choosing to go online with their listing, incorporating them into their website, or publishing them quarterly as a part of another mailing. Yet others opt to work with a local media partner (usually a newspaper) seek pro bono space in their local paper to publicly thank and recognize their donors through a full- or half-page advertisement. It is always important to be asking, tracking and capturing who wants their gift to remain anonymous; it is imperative to do this if you contemplate public recognition through one of these venues.

3. Eventually, you may have donors whose gifts merit permanent recognition because they’ve provided significant endowment funds for your program or you’ve acquired permanent space for your programming (which would likely include programs beyond Health Rocks). Naming opportunities for those spaces, or for positions or aspects of your program (think: The Jane Doe Program for Youth Leadership Development) can be a meaningful way to recognize these donors. Other annual donors at a significant level may appreciate a plaque, or framed letter of appreciation or other honor for their giving. Some love these mementos, others see no need for them. When in doubt, check out the office—do you see a lot of these items for others? Still in doubt: ask!
Step Three—Create an Inventory of Stewardship Messages and Collateral

1. After the thank you letter, some workable plan for delivering recognition, you still need to deliver on the third plank of stewardship: impact and outcomes. As you develop your case for support language, think about how you can collect and deliver on the promises you make in your case. Remember to add both quantitative and qualitative messages of impact and outcomes to your stewardship inventory: hearts and minds!

2. Engage with the rest of the Health Rocks staff to collect meaningful moments from programs and bright ideas on how to deliver them. This is a great reason to collaborate with both the implementation and evaluation teams: together you can develop a process for collecting and delivering powerful messages about the difference your program is making in all the communities where you are present.

3. Create a few simple pieces—a postcard, letter or email, capture some mail-able materials that kids in your program have created, take video and post it online. Just like your case for support “inventory of language”, you’ll need more messages than you need materials. Everyone should hear from you in a simple, cost-effective way at least once during the year, but you’ve got lots more opportunities to share the impact of your work—on visits, at local and state fairs, at events, in the schools where you work, with your volunteers, etc...

4. At all your events—not only any donor recognition events you choose to host—include some stewardship as a part of the experience. By starting stewardship at the event itself, you’ll infuse mission and philanthropy further into the minds of your donors, start separating the “transaction” of the event from the good their gifts are going to be put to work to do. Also consider hand-delivering some of these simple pieces to top donors to send the message: you are in our “inner circle”.

5. Strongly consider adding a “Thankathon” once or twice a year as one of the most wonderful ways to reach out to many of your donors at once, deliver the pleasant surprise of a call “just to say thanks!” and engage your volunteers, staff, champions, everyone (!) in a really enjoyable—and highly meaningful—fund development activity. You need nothing more than some donor lists with phone numbers, a sample script to guide conversations and a bunch of people with cell phones. To take it to the next level, ask a local restaurant to host you in a private room, provide some food and drink, and invite some youth and adult leaders to share some “mission moments” from your programs to share on the calls.

Thinking creatively about times when you can “piggyback” on other mailings or outreach to solicit gifts is usually a great idea. Here’s the one exception: if you’re asking, it’s a solicitation, not stewardship. Your donors deserve to hear from you—even just once per year—in a way that carries only that message of thanks, impact and outcomes.

REality CHECK:
We’re working on a tight budget. When I create these stewardship pieces, I really want to drop in a pledge envelope and give my donors one more chance to support us. Is there any problem with that approach?
Step Four—Implement Tailored, Personalized Stewardship for the Critical Few

1. Tailored, personalized stewardship shouldn’t add to your “materials creation” work; work from inventory of collateral materials you are sending to everyone and think through easy ways to “take it to the next level”. For example, are you sending a donor report? Add a personal note to the front, or hand-deliver an advance copy and you’ve tailored stewardship to a leadership donor.

2. There may be a few donors, who have been your champions from the beginning or are giving at the very top of your table of gifts each year, that need a completely tailored experience. Deliberately seek them out to thank them, build the right recognition for them and engage them in your work; you may want to offer them an individual opportunity to see a program in action or invite them to an end-of-program celebration. You may want to offer special recognition at an event or through your donor listing.

3. All strategic relationship-building plans should include stewardship as a core step needed to build a long-term, deep giving relationship with each of the Critical Few.

Step Five—Building a Culture of Philanthropy by Involving Others

1. While you will do and re-do each of the steps above to keep things fresh and creative, this is the step that will continually be a “work in process”. Expect it to be so and enjoy the gradual development of a culture of philanthropy on your team and in your communities.

2. Consider beginning by identifying and recruiting a few champions who are passionate about your program and delivering stewardship of volunteers, donors and other collaborative partners. Empower them to act and check back in regularly on what is working and with whom they have spoken. These champions may be fellow team members, youth or adults, volunteers, county agents or other community partners.

3. Once you have several stewardship champions reaching out into important communities, consider launching a formal (or informal!) stewardship committee or task force that partners with you to develop and enhance the inventory of stewardship materials and messages and will help be a force multiplier in reaching out widely into communities across the state.

4. Reach out to parents and youth in program who have participated in your programs to share the role that philanthropy plays in making Health Rocks possible and engage them in sharing the message of the importance of giving and stewarding with others.

5. Celebrate & reward each other within the Health Rocks and 4-H team! Keep your own successes on the “dashboard”, make it a priority to take time to acknowledge each other’s successes.
Summary of Key Points

Stewardship raises money; it isn’t just the afterthought to giving. Stewardship sets your program apart from many others in the community; it tells everyone that donor care is a top priority and a core value of 4-H. Stewardship creates joy!

Start building your stewardship plan now; set down the baseline stewardship steps and experience you want to deliver and build a workable plan that you will implement rather than dream that will get shelved.

Engage others in the work of stewardship. It is the single best point of entry for further fund development work!

Tools, Templates and Samples

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