
CARE OF DONORS: RECOGNITION, AND STEWARDSHIP

Adapted from Kathryn W. Miree 2007

Care and stewardship of donors is critical to success of your Create a Jewish Legacy Program for three reasons:

1. Most Create a Jewish Legacy gifts are revocable, deferred gifts such as bequests. This means the donor can undo the gift as quickly as it is created and may do so unless he or she remains engaged with your organization and its work.
2. Stewardship allows you to protect your investment in the donor. You spend both time and money bringing the door to the table; why not protect that investment by retaining the donor rather than having to make a new investment to acquire another donor.
3. It is the right thing to do. Without donors, your work would not be possible. Gratitude and interest is always appropriate.

One of the biggest mistakes many charities make in the gift development process is to focus only on getting the gift – with little attention on the donor. This may sound puzzling because acquiring a gift necessarily requires contact with the donor. However, many organizations talk to the donor ONLY when the organization needs money and when questioned about this practice assert the budget does not allow time for “non-productive calls”.

It is important to begin with a definition of the key terms, and a general overview of the importance of care of your donors.

Defining Cultivation, Recognition, and Stewardship

1. *Cultivation* – Cultivation, in its most familiar sense, refers to the process of preparing the ground for crops. In development, cultivation refers to the process beginning at engagement, moves to discovery and education, and ultimately to the gift. Cultivation continues after the initial gift to move the donor further down the path, whether that is as a multi-year donor, a donor moving from an entry level to higher (perhaps major) gift, to a deferred gift.
2. *Recognition* – Recognition is the process of privately and publicly acknowledging the donor’s gift in a way that honors them for their gift.
3. *Stewardship* – Stewardship is defined as . For development purposes, stewardship refers to the ongoing care of donors and the funds contributed to your organization. Stewardship implies a relationship with the donor that requires intentional care, a plan, and effort.

One Process

Taken as whole, cultivation, recognition, and stewardship are part of the same process involving an acknowledgement of the donor's contribution to your organization. The donor has more than one million choices in charities. They must feel their gift to you – whatever size and form – had an important impact on the community you serve.

Engaging Donors in Your Work

Invite donors to come to your facility and participate in a project. Invite them to help you lead tours. Invite them to teach education classes, tutor refugees, or work in your food pantry. Donors are far more engaged in giving if they are volunteering because they have a closer relationship with your organization, take ownership for outcomes, and can witness first hand the impact of your programs. As you launch the Create a Jewish Legacy campaign, think of ways to re-engage donors, especially those individuals who may no longer participate.

Challenging Donors to Take Ownership

Don't make it easy. Challenge donors to take responsibility for mission and outcomes. Extend the conversation you started above by challenging the donor to think about their role in your future in these ways:

- a. What do you feel are our greatest challenges as you look out over the next five to ten years?
- b. How can you help us address those challenges?

Once you know why a donor invests in your organization and what his or her greatest concerns are for your future you are in a great position to keep them informed/engaged on that topic and to challenge them to partner with you to address those challenges.

Ongoing Contact

People drift away from people and from institutions. Any ongoing relationship requires work. Donors are no different. You may find it easy to engage a donor when your organization provides a service they need, whether that is Day School, a workout location, or community. When that donor no longer needs that service (their child moves on to another school) you may lose their attention unless you have engaged them at a deeper level.

Try these simple contact mechanisms:

1. Make 5 to 10 calls every Monday morning to connect. Use this as a thank-you call, "I thought you'd like to know" call, or "how was your trip" call. You may even use it to follow up with the child no longer in day school to say: "We were talking about Rachel today and how much we miss her here – how is she doing in _____ School?"
2. Send a note or article with a program update.
3. Remind the donor of an upcoming event and send him/her a personal note expressing hope they will attend.
4. Hand deliver an annual report.

5. Hand deliver a loaf of bread, a wreath, or small gift during the Holidays.

Donor Recognition

Donor recognition may take a variety of forms. Recognition is important for several reasons:

1. It acknowledges the value of the donor's gift.
2. It is a public "thank you"
3. It inspires others to contribute.

Stewardship

Charities must embrace stewardship as part of their culture if stewardship is to become part of the work ethos of development, finance, programs, and other areas. Involve all staff as you develop your program and make it clear that every contact with every donor is important.

A. Embrace Stewardship as an Institution

As stated earlier, the entire organization must be committed to stewardship requiring:

- A clear understanding of the role each staff and board member plays in stewardship;
- Ongoing training for staff and board to make them more effective in their stewardship roles;
- Systems in place to track stewardship;
- Annual goals related to stewardship (and tracking those goals);
- Standards for gift acknowledgement, accuracy of donor data, and confidentiality of donor data; and
- Prioritization of stewardship IT projects.

B. Create a Stewardship Plan

Adopt a formal stewardship plan. You can approach this in a variety of ways. The stewardship plan focuses on the treatment of donors by gift level, provided standards for both print/electronic communication and personal contact. Communicate with the donor/investor on as personal a level as possible. That means:

- *Knowing the donor and the donor's family.* Take the time to get to know the donor by talking with them about their history with, and interest in your organization. The results of that conversation should be recorded on the charity's data base. Engage the family. Start early to build a multi-generational relationship that fuels and sustains the family's interest.
- *Ongoing reporting.* Stay in touch with the donor to report goals and progress to goals.
- *Ongoing relationships.* If you treat the relationship as ongoing, it is far more likely the donor will share that feeling.
- *Perpetual.* When a donor makes a legacy/endowment gift, stewardship continues after the donor's death. In accepting the gift, the charity makes a commitment to honor the donor's wishes in perpetuity. Look at this as an opportunity to keep the family involved, but also as a legal mandate to comply with donor directives.