

Major Donor Cultivation/Stewardship

By Jef Nobbe, Development Director, Camp Solomon Schechter

Once a constituent has been identified as a major donor prospect, they are assigned to the most appropriate Board or Leadership Staff member. In a perfect world every Board member and Leadership Staff member (the stewards) would steward 5-10 constituents on an ongoing basis. Additionally, a culture where the stewards report any significant interactions they have with their constituents back to the development staff needs to be established, so they can add this information to the donor database. Many of our camps keep their institutional knowledge in their heads, this practice becomes problematic when the information is lost during Board and staff transitions. Conversely, the professional staff should keep the stewards informed about any involvement the constituents have with camp – contributions, attendance at events, participation in shabbatons, renting camp facilities in the off season, et al. The steward, as the constituent's liaison with camp, needs this information so they are not blind-sided by the constituent and have additional opportunities to connect with them.

Using the terminology coined by the fundraising community, a “touch” is any NON-ask interaction with a constituent that helps to increase their relationship/commitment/connection to camp. Each touch should be meaningful, feel genuine and be sincere. Touches should happen about every month, with most being fairly brief with one or two more significant ones, when appropriate. Remember, the key here is for the touches to feel genuine and to bring the constituent closer to the organization.

First Touch

The first touch is basically the same for all constituents. It is a time for the steward to introduce him/herself to the constituent and to find out about the constituent and should be done by phone or in person. The initial contact should be initiated because of some natural, recent interaction between the constituent and the camp; examples include an annual gift, attendance at a camp event or a recently found alumnus. The interaction should include the following, *using a constituent-centered approach*:

- Thank them for their recent gift, attending the recent event or re-engaging as an alum;
- Engage them in a conversation about their specific interests in camp;
- Answer any questions they have about camp and the organization in general;
- Let them know you, as a Board/Leadership Team member, are available to answer questions, listen to concerns and generally be their liaison with camp;
- Ask them if they would like to receive relevant information and updates about camp from you, personally, on occasion;
- Find out how they, generally, want to receive this information (phone calls, email, snail mail, face-to-face, etc.); and
- Thank them again for any/all of their involvement with camp over the years (make sure to get as much information as you can before this first touch).

Another way a constituent is included in the cultivation/stewardship process is when the steward knows the constituent through their social/professional circles, and the constituent expresses an interest in the organization. The steward should address the following when it feels natural in their social/professional interactions:

- Find out about their specific interests in camp;

- Answer any questions they have about camp and the organization in general;
- Let them know you, as a Board/Leadership Team member, are available to answer questions, listen to concerns and generally be their liaison with camp;
- Ask them if they would like to receive relevant information and updates about camp from you, personally, on occasion;
- Find out how they, generally, want to receive this information (phone calls, email, snail mail, face-to-face, etc.); and
- Thank them for their interest in the camp that means so much to you.

Example Schedule of Touches

Procedurally, templates for most of the touches will be initiated by the professional staff or board fundraising committee. Once the stewards receive the templates, they will need to personalize them and incorporate why the touch is meaningful to the constituent. The following is an example list of touches. Actual touches should develop organically, keeping a couple “generic” touches in reserve for those months when something does not present itself. The most important thing to remember about these touches is that they **SHOULD NOT INCLUDE ANY FORM OF ASK!!!!**

January: Send either a PDF or hardcopy of the Annual Report with a personal note.

February: Discuss the recent winter storm damage at camp:
 “As many of you already know, the recent winter storm that ravaged the Pacific Northwest also made its way to Camp. Schecter was blanketed in about 18 inches of snow followed by a windy, ice storm. It caused well over 50 trees to collapse under the weight, scarring the woodlands, not to mention knocking down power lines, hitting numerous structures and generally causing mayhem throughout our, normally, serene and beautiful forests.

Fortunately, the damage was not overwhelming, and Frank and his crew quickly began cleaning up the mess. Our insurance will cover a majority of the costs of removing downed trees and repairing the damaged structures and power lines. Here are a couple of pictures from Camp:”





March: Let the constituent know we were voted the Best Jewish Camp in the JT News for the second year in a row!

“Thanks to all of our ardent Schechter supporters out there who voted us "Best Jewish Camp" in the JTNews for the second year in a row! As they say in the JTNews: "One word: Matisyahu. Any camp that can get the world-famous beat boxer to come back year after year, not to mention the hundreds of kids who come home each summer with life skills, such as lanyard-making, is tops in our book."

This is really an award for the entire CSS community -- from our wonderful campers, parents, staff, head staff, alumni and Board of Directors. Thank you for all you do that helps to keep Schechter #1!!!”

April: Female constituents: Personally, invite them to come to Women's Retreat.

Male constituents: Send link to the recent article, "*Jewish Summer Camps Encourage Jewish Continuity.*"

May: Send an email with the following picture and a note about how quiet and serene the camp looks this time of year, and how different it will look when the campers begin to arrive in a month!



June: Send an email with the following picture and a note about how much difference a month can make at camp, from quiet serenity to the hustle and bustle of campers!



July: Personally, invite the constituent to the Camp Open House; encourage them to come by offering to buy their BBQ lunch; if they do come, make sure you find them, thank them for coming and give them the grand tour.

August: Call to personally invite them to the performance and discussion with Jewish reggae and wrap superstar, Matisyahu, which the Camp Director was able to confirm at the last minute.

September: Male constituents: Personally, invite them to come to Men's Camp.

Female constituents: Send link to the recent article, "*Jewish Summer Camps Encourage Jewish Continuity.*"

October: Wish the constituents a Shanah Tovah from Camp!

November: Inform the constituents that we received our ACA Accreditation:

"The American Camp Association® (ACA) announced late last night that Camp Solomon Schechter (CSS) has received ACA-Accredited® Camp status for Summer 2012, for the first time in CSS's 57-year history.

ACA Accreditation means that Camp has passed a thorough review of its operations – everything from staff qualifications and training to emergency management. The ACA collaborates with experts from the American Academy of Pediatrics, the American Red Cross and other youth-serving agencies to ensure that current practices at Camp reflect the most up-to-date, research-based standards in camp operations. Camp Solomon Schechter and the ACA are excited to form a partnership that promotes summers of growth and fun in an environment committed to safety."

December: Wish the constituents a Happy Chanukah from Camp!

Add'l Ideas: Invitation to a recognition campfire cookout with camp songs only for constituents in this process

Invite the constituents to experience the new whatever (challenge course, zip tour, archery range, etc.) that was just installed at camp

Acknowledge events in their lives (if you have that information) – birthdays, anniversaries, births, deaths, congratulations, et al.

Thank the constituents for any/all involvement in camp activities – contributions, attendance at events, participation in shabbatons, renting camp facilities in the off season, et al.

Progression of the Constituent

It was mentioned at the beginning, but it bears repeating: a culture should be established for the stewards to report any significant interactions they have with their constituents back to the development staff, so they can add this information to the donor database. Conversely, the professional staff should keep the stewards informed about any involvement the constituents have with camp – contributions, attendance at events, participation in shabbatons, renting camp facilities in the off season, et al.

Some constituents will chose to opt out. If you can find out why, that would be wonderful information. Otherwise, realize this is normal, it was not a good fit, and move on to another constituent. Most constituents, though, will appreciate the personal attention and being kept informed about the camp they know and love.

At this point, you are probably asking yourself, "This is all good and well, but when do we sit down for the big asks for money?" This is a perfectly valid question, considering the investment of time

and resources. Unfortunately, the answer is not cut and dried. Some constituents will be immediately ready, some a year or two and some never will be quite ready. In general, most will be ready for a sit down, face-to-face ask within a year or so. The steward and development professional should work together to determine the right time. Trust the process; the steward, in consultation with the development professional, will get a feel for when the time to “strike” is right.

For the constituent who is already invested in camp and only needed some TLC (tender loving care) from a steward, a major ask could happen as early as six months into the process. For the “standard” constituent who knows camp and gives moderately, a major ask will probably happen around the one year or so mark. And, so on. Remember, patience and relationship-building are the keys to success. Some constituents may not bear fruit for years until something clicks for them and they invest.

Given that, what about when the steward is getting the distinct impression that the constituent is never going to quite be ready? Have the steward talk it through with the development professional and/or one or two fellow stewards. Why were they put on the major donor prospect list in the first place? Have they engaged in the process? If so, what engages them? What are the expectation(s) for this prospect? Is it a matter of money? If so, should the expectation(s) be shifted to other resources (Board membership, volunteering, “rainmaking,” expertise, etc.)? If the steward comes out of this discussion still feeling like they are never going to quite be ready, it is probably time to go ahead and request the ask meeting. During this process, the steward will either find out that the constituent was actually ready or find out what was causing the “not quite ready” impression. Obviously, it is better to ask than to just drop them without even an attempt, and the ask meeting may be the push needed to get the constituent over that hump to fully investing in Camp.

The Ask

The ask is covered in a separate training.

After the First Ask

Donor stewardship is an ongoing process. The stewards are not “done” after the first ask. The touches should continue, but, in many cases, the constituent becomes more involved with camp – volunteer, Board membership, committee membership, etc. – becomes a steward themselves AND brings in their circle of friends and colleagues: wonderful, new donor prospects!

Even so, a regular (usually annually) ask meeting should be scheduled. Don’t just assume they will continue to give without stewardship and a personal ask. The stewards have developed a relationship between the camp and the constituent. Using a metaphor, how would you feel if, after your wedding (the first major ask), you just saw your spouse passing in the hallway and then received a form letter on your anniversary? I am sure the marriage would not last long!

Final Point: IT IS ALL ABOUT BUILDING AND MAINTAINING A RELATIONSHIP BETWEEN CAMP AND THE CONSTITUENT!!!! The money will follow.