Strategic Donor Stewardship for Camps

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President & Lead Donor Recognition Strategist
Heurista, Co.
Donor Relations
Stewardship
Donor Retention
Increased Giving
Giving to Capacity
Giving to Priorities
Unrestricted Giving
Advocacy
What we expect from a well-stewarded donor:

The donor is engaged in the mission of the organization,

contributes at least annually, and

speaks positively of the organization in the community.
Acknowledgement (Compliance)

Recognition

Reporting

Engagement
Donor Relations and Stewardship

Intangible Program Design (Planning)
Donor Relations and Stewardship Plan

Basic Tools:

- Organizational chart with job descriptions
- Bylaws, policies and procedures
- Gift regulations, especially for naming opportunities
- Gift agreement templates and review and approval plan
- Stewardship activities matrix with timelines and assignments
- Recognition product standards
- Communication protocol with examples
- Donor lists ready for publication
- Gift pyramids (target and actual)
- Donor Bill of Rights
<table>
<thead>
<tr>
<th>Type</th>
<th>Legacy</th>
<th>Cumulative</th>
<th>Annual</th>
<th>Volunteer</th>
<th>Non-Donors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Giving Level</td>
<td>Individuals</td>
<td>Individuals</td>
<td>Frequent Giver</td>
<td>Individual</td>
<td>Tribute and Memorial</td>
</tr>
<tr>
<td>$100K+</td>
<td>$10K+</td>
<td>3x per year</td>
<td>$1,000-</td>
<td>$100-</td>
<td>Any $</td>
</tr>
</tbody>
</table>

**Within 48 hours of new gift**
- Database Entry: **DB ADMIN**
- Personalized Receipt
- Letter to Honoree

**Within 72 hours**
- Customized Letter/Card signed by
- Phone Call from

**Within 10 days**
- Handwritten Note
- Social Media Announcement
- Press Release

**Within 3 months**
- Web Profile
- Meeting Scheduled
- Gift Presentation

**Within 6 months**
- Facility Recognition Scheduled

**Annual**
- Honor Roll
- Donor Wall
- Website
- Thank You Event Invitation
- Gala Report

**Campaign End**
- Web Recognition
- Print Collateral
- Celebration Event(s)
The George Williams Society ($10,000+)
Action Track

- Pledge of $10K+ Made
  - Within 48 hours
  - Touch Point #1
- Standard Acknowledgement signed by CEO and Volunteer
  - Within 2 weeks
  - Touch Point #2
- Handwritten note from CEO or Volunteer
  - Within 2 weeks
  - Touch Point #3
- Thank you Phone Call from CEO or CDO with invitation for a Community Steward Tour (CST)

- Falls into standard Stewardship Plan
  - Within 2 months
- Community Steward Tour
  - Within 2 months
  - Yes
- Follow-up Call to schedule CST
  - 3 months out
  - No

YMCA of Western North Carolina
Donor Relations and Stewardship

Tangible Program Design (Branding)
Jewish Community
Jewish Camp
This Camp
Central Recognition Display: Interactive Touchscreen

Because of contributions from donors like you, the Y is able to help students at Woodfin Elementary adopt a healthier lifestyle. Twice a week the Y provides guided physical activity, nutrition, and wellness education during regular recess time.
Naming Opportunity Signage

**REUTER FAMILY YMCA**
Irving and Jeannett Reuter were nihilis a nihilca imisquam perobuli, adeortio, notil consit. Ifec re potio medefatin interip sentem, serraciditis cla mo con ta Scientra ventum cum prit vit cervica essenterit publi, es consid sene ine crum aute, vignonsils sim dis ego viliemel pos oriondered aribus hoc.

Ihilupt ationsequid que de nullorae cus. Min plaudam eris num utaqu aut ut velecat licae quam et autatempporem et utatis expliat urest, sitasips res reiusaeuctur sita consectiae solest ea consecti doles explabores acium veliquia

2014.

**GLASS LODGE**
The Glass Family is excited about Camp Watia nihilis a nihilca imisquam perobuli, adeortio, notil consit. Ifec re potio medefatin interip sentem.
Seracidos cla mo con ta Scientra ventum cum prit vit cervica essenterit publi, es consid sene ine crum aute, vignonsils sim dis ego viliemel pos oriondered aribus.

2015.

**WILKINSON AMPHITHEATER**
Bill and Margaret Wilkinson have nihilis a nihilca imisquam perobuli, adeortio, notil consit. Ifec re potio medefatin interip sentem, serraciditis.
Cla mo con ta Scientra ventum cum prit vit cervica essenterit publi, es consid sene ine crum aute, vignonsils sim dis ego viliemel pos oriondered aribus hoc.

2014.

**TD BANK CABIN**
TD Bank is a proud supporter nihilis a nihilca imisquam perobuli, adeortio, notil consit. Ifec re potio medefatin interip sentem, serraciditis.
Cla mo con ta Scientra ventum cum prit vit cervica essenterit publi, es consid sene ine.

2014.

**ABERMARLE LOCKER ROOM**
Harrison Abermarle is a longstanding nihilis a nihilca imisquam perobuli, consit.

2014.

**ROBINSON FAMILY MULTIPURPOSE ROOM**
The Robinson Family has been nihilis a nihilca imisquam perobuli, adeortio, notil consit. Ifec re tiq.

2014.
Conservancy of Southwest Florida
Legacy Recognition
Areas of improvement for camps:

Internal Education
Areas of improvement for camps:

Shared Knowledge
Areas of improvement for camps:

Broader Expectations
Resources

Association of Donor Relations Professionals
Penelope Burk - *Donor Centered Fundraising*  
Lynne Wester - *The Four Pillars of Donor Relations*
Amanda Jarman - specializing in data systems
Julia Emlen - *Intentional Stewardship*
Tom Ahern - donor communications newsletter
Nicole Lamberg – donor communications strategy
Heurista - donor recognition specialists
Journal of Donor Relations and Stewardship

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