

More

**With grateful thanks: delving deeper into
successful stewardship**

Eleanor Marsden

Director of Development
Farleigh School

Chair: Georgie Grant Haworth

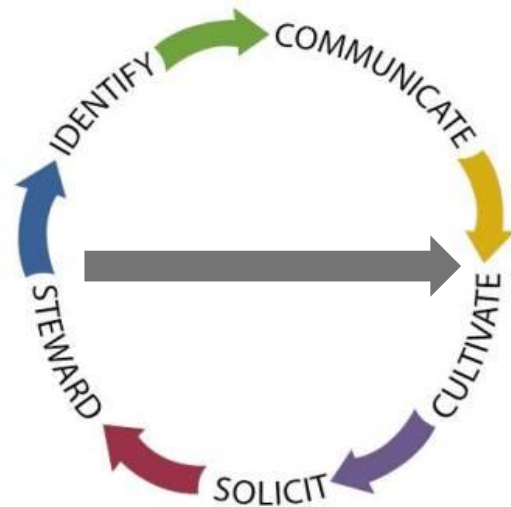
FARLEIGH *development*

With grateful thanks:
Delving deeper into successful stewardship

*Eleanor Marsden
Director of Development, Farleigh School
Hampshire*



Prospect Tracking



Pipeline position	Prospects at each level	Actions at each level
Identified	3	0
Research	118	5
Strategy	26	5
Cultivation	12	5
Solicitation	6	2
Negotiation	5	3
Gift/Ask Funded	0	0
Stewardship	26	2
Total	196	22

Identify
Inform
Interest
Involve
Invest

Q.) How many people know exactly who they're stewarding – and how?

Where does stewardship sit in your programme?

- Is stewardship in your donor charter?
- Do you have a stewardship plan?
 - Banking
 - Data capture
 - Communications
- Do you / could you work out your donors' LTV?
- Do you steward regular and lapsed donors?

Q.) Who has mystery-shopped their thank-yous?

Stewardship for all: where to start?



The giving cycle

“When can I ask them again?”



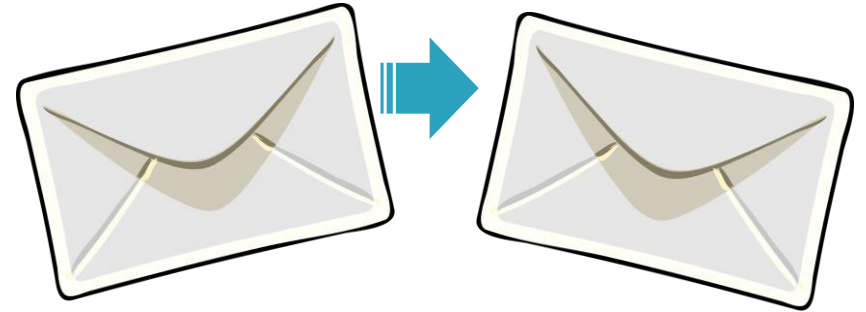
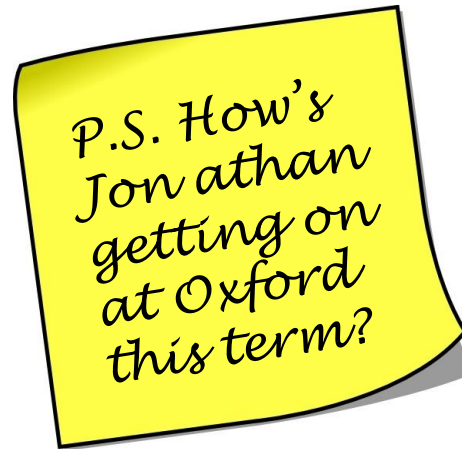
Understand their motivations:

- Altruistic
- Dynastic
- Communitarian
- Religious
- Repayer
- Socialite
- Investor

Have a plan...

		PROSPECT				PROSPECT		LEGACY	LEGATOR / LEGATOR'S EXECUTORS	LEGATOR
	Activity / Engagemen t	Regular Givers <£1000/yr (inc. Kingsley)	Leavers' Gift (Students)	Regular Givers >£1000/yr	Trust / Foundation Grant	Mid-level donor at E – C level	Major donor at B – A* level	Legacy pledger		Legator – either EDJS or ELM
Thank you letters	Letter from ELM	● At sign up			If applicable	●		● Under £10k		
	Letter from EDJS		●	● At sign up	●		●	●	●	
	Letter from AFS				●		●		●	
	Annual thank you email	●		●	●		●			
	End of regular commitme nt letter / email	● Email		● Email	● Email	If regular giver: letter	If regular giver: letter			
	Master annual letter			● £5k+		●	●			
Reporting	Recognitio n in Dev. Report	●	●	●	●	●	●	●		
	Impact Report				●		Top 40 donors			
Communicatio ns	Foundation newsletter	●	● As GVs	●		●	●	●	●	
	Christmas card	● e-card		● e-card		● e-card	●	●		
Events	Canvasser visit				If applicable	If applicable	●	If applicable	If applicable	
	Campus tour					If applicable	If applicable			
	Campus event invites	●		●		Ds & Cs	●	●		
	Invite to capital project opening	If applicable		●		If donor	If donor			
	Invite to Master's event (drinks / meal)						● As appropriate	● As appropriate		
Permanent Recognition	Mention on website – latest news		● As a group		●					Legacy executors on web where appropriate
	Recognitio n on North Front board						A*s		Legator if £250k+	

...But personalise it...



Thank you



...and avoid ‘*autoblag*’*!

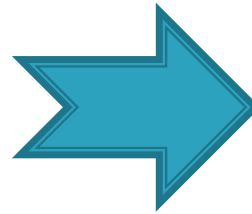
“Your gift will make a real difference...”

“Your donation is having a direct impact...”

“Regular gifts help us to plan for the future...”

“With your support, we can ensure that [our programme] goes from strength to strength...”

**What George Smith calls ‘mental autopilot’!*



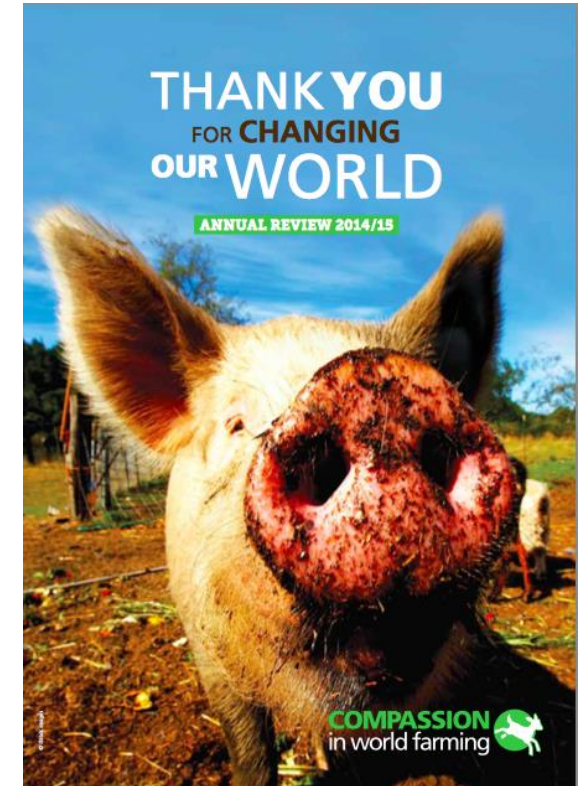
- Don’t be parodic!!!
- Focus on beneficiaries not organisation
- Use predicate phrases
- Don’t say ‘we’
- Get *alumnus / alumna / alumni* correct!
- Include testimonials
- Don’t downplay core costs – value added, no draining cost
- Stewardship is about the future; cultivation is about the present.

After great content comes great presentation...

- Mehrabian (Professor of Psychology, UCLA) - just 7% of meaning from words
 - Decent paper / cards / online web design
 - Buy a good calligraphy pen!
 - Time it right
 - Sign it right – right words, right person...

Favourite examples...

See also www.sofii.org



Philanthropy

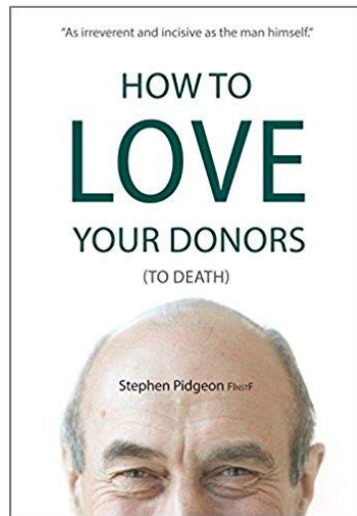
Filos = friend + *Anthropos* = Mankind

- Give great emotional experiences... (Warm and fuzzy!)
- Continue involvement
- Create additional interest
- Get a second gift + + + > legacies
- Honour your anonymous donors
- Don't forget your minor & regular donors (who often give more, proportionally)

Thanking makes them – and you – feel good!



Questions



Eleanor Marsden

MA MInstF(Dip) FRSA

Director of Development, Farleigh School

emarsden@farleighschool.com

01264 712 843