



With grateful thanks: delving deeper into successful stewardship

Eleanor Marsden

Director of Development Farleigh School

Chair: Georgie Grant Haworth



With grateful thanks: Delving deeper into successful stewardship

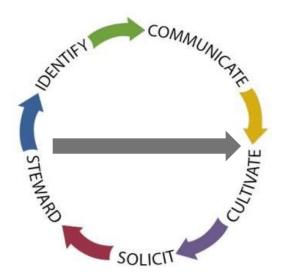
> Eleanor Marsden Director of Development, Farleigh School Hampshire

IDPE 2017 Annual Conference

100 - 21



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?

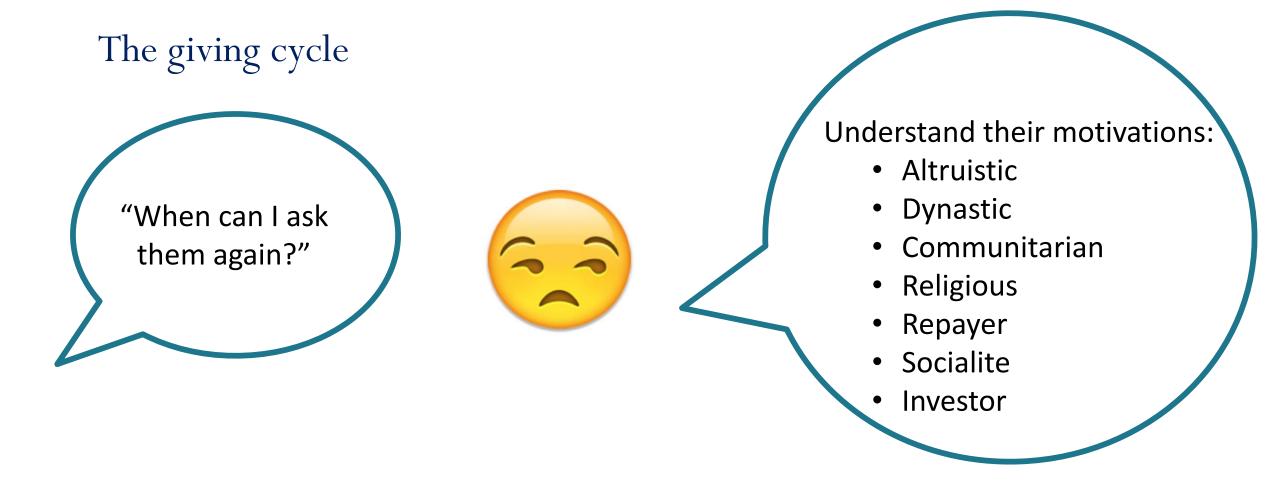
Q.) Who has mystery-shopped their thank-yous?



Birthday / anniversary / first gift cardsIndividual / Trust impact reportsFilms & multimediaNaming opportunities (Pareto Principle 80:20)Annual reportsSchool board membership		
(Pareto Principlo 80:20) membership	•	
(Fareto Frinciple 80.20) Benefactor Boards:		
Societies & clubsaspirational Lunches & eventsSchool board membership		
Giving garden / donors books content / access Personalised web content / access		
Involvement / advice: research builds active supportPlaques / bookspins / presentsNewsletters	1	





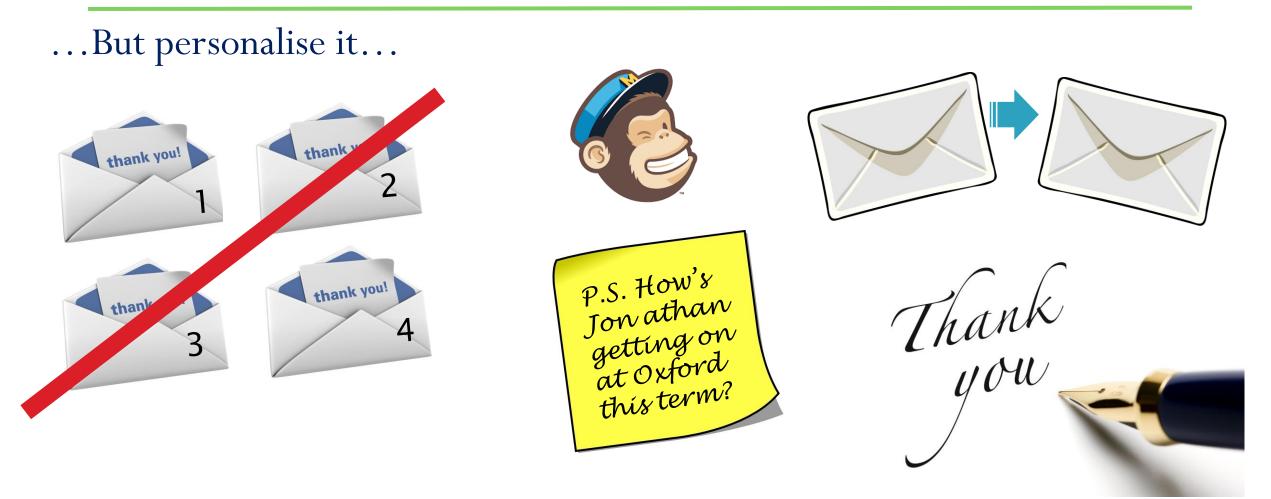




Have a plan...

		Reactive				Proactive		Legacy		I NOTES
	Activity /	Regular	Leavers' Gift	Regular	Trust /	Mid-level	Major donor	Legacy	Legator /	
	Engagemen t	<f1000 yr<br="">(inc. Kingsley)</f1000>	(Students)	Civers >£1000/yr	Foundation Grant	level	at B - A* level	predger	Legator's Executors	
Thank you letters	Letter from ELM	At sign up			If applicable	•		Under £10k		Legator – either EDJS or ELM
	Letter from EDJS		•	At sign up	•		•	•	•	
	Letter from AFS				•		•		•	
	Annual thank you email	•		•	•		•			
	End of regular commitme nt letter / email	e Email		Email	Email	If regular giver: letter	If regular giver: letter			
	Master annual letter			●£5k+		•	•			
Reporting	Recognitio n in Dev. Report	•	•	•	Þ	•	•	•		
	Impact Report				•		Top 40 denors			
Communicatio ns	Foundation	•	As OWS	•		•	•	•	•	
	Christmas card	e-card		e-card		e-card	•	•		
Events	Carwasser 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+	







...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...

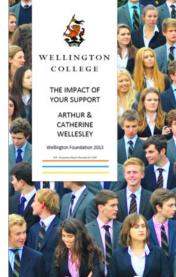
- Mehrabian (Professor of Psychology, UCLA) just 7% of meaning from words
 - Decent paper / cards / online web design
 - Buy a good calligraphy pen!
 - Time it right
 - Sign it right right words, right person...



Favourite examples...

See also www.sofii.org







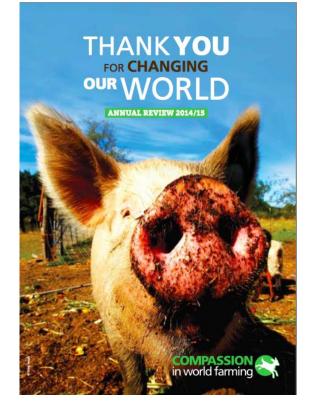
Edward Schneider

Your support is giving us the financial ability to do extraordinary things.

Weilington College is one of over independent schools in the UK, but o extraordinary fusion of innovation, ori and a century and a half of history, stand from many others.

In the breadth of its education and excellence of its teaching, as well as in its via and emphasis on educating the whole ch Wellington offers an education unlike other. It was recently voted school of the y 2015 by Tafter maassine.

ອ ເອີ້ມແມຣ any aspect of this report, or simply to get in touch, please contact the Development ram at the Foundation Office, Wellington College, Crowthorne, Berkshine, RG45 7PU, or emai revolument@Meulinatoncollege.co.uk; 7E+4400 3344 440023.





PhilanthropyFilos = 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)

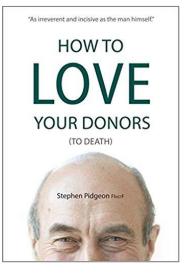


Thanking makes them – and you – feel good!





Questions



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