

THE GOLDEN RULE OF GOOD STEWARDSHIP

3 Steps for Better Donor Relations This Holiday Season

A Few Logistics

- Attendees will get copies of the slides
- Ask a question any time via the onscreen **Q&A chat box**
- This session is being recorded

Stay Tuned

win a 1:1 consultation with the guest speaker
for a personalized stewardship plan for your organization
(drawing during wrap-up & must be present to win)

Presenters



Rachel Muir

Client Strategy
Executive at Convio
& Founder of Girlstart



Jennifer Darrouzet

Sr. Product Marketing
Manager at Convio



Sachin Wadhawan

Sales Engineering
Director at Convio

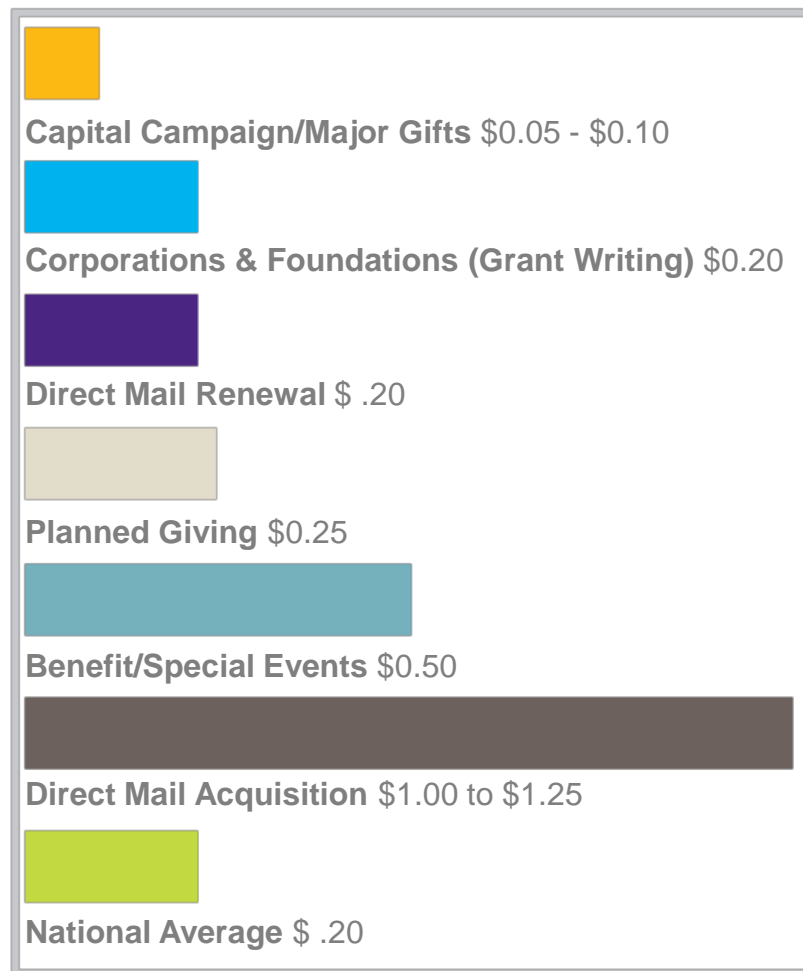
Agenda

- **The Art of Appreciation:**
 - The Upside (& 3 Great Examples)
 - The Downside (& 10 Not-So-Great Examples)
- **The 3 Things Every Donor Expects**
- **Stewardship Plans That Work**
 - A Sample Plan (& Stump the Speaker Challenge)
- **Watch Your Timing**
- **Q&A**

The Art of Appreciation – The Upside

For every dollar raised:

- \$1.00+ to acquire a new donor
- \$0.20 to renew an existing donor



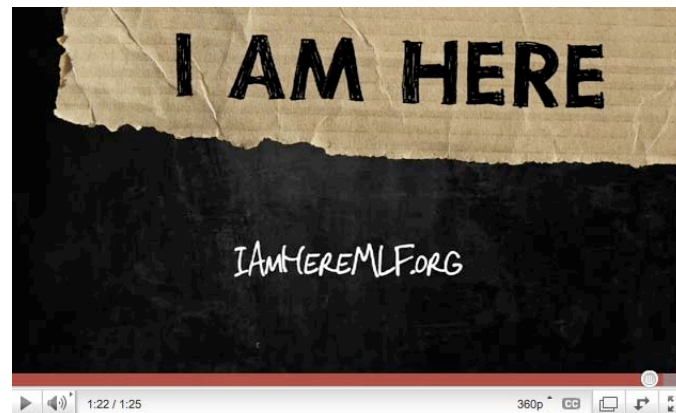
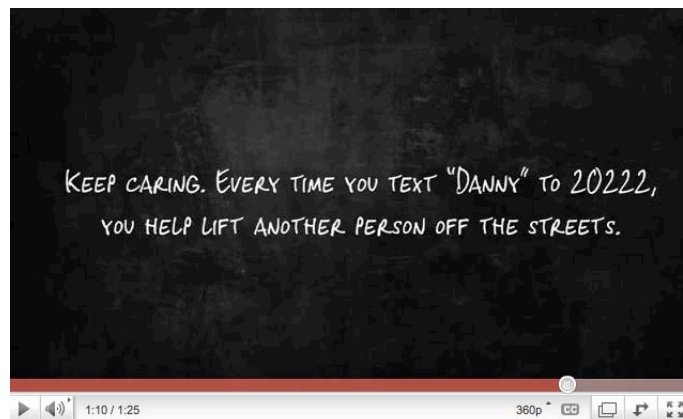


MLF I Am Here Thank You From Alan and Danny

mlfnw

209 videos

Subscribe





CF! Residents - WE ARE HERE!

mlfnw

209 videos



Subscribe



September 3, 2010

Dear Friend,
It is with enormous sadness that I write to you today. Peter Gubser, humanitarian, author and devoted friend of Palestinian communities throughout the Middle East died last night at the age of 69 after a long struggle with cancer.

He never stopped seeking a better future for the Middle East even after retiring from ANERA in 2007, having served 29 years as ANERA's President.

Peter was dedicated to providing quality education for Palestinians. He said, "The big picture may be slow to change, but to the person receiving a textbook, the future is immediately better."

He was a keen observer of Middle East society and a historian. He published articles and research papers on various aspects of Middle East economic development. His latest book, "Saladin, Empire and Holy War" (Gorgias Press, April, 2010) offers a remarkable and highly readable portrait of the complex warrior-king. He also wrote several books on Jordan, including a historical dictionary of the Hashemite Kingdom.

Under his leadership ANERA touched the lives of millions of Palestinian families. From the construction and establishment of IT Centers of Excellence at four universities in the West Bank to the creation of ANERA's Milk for Preschoolers Program in Gaza, he remains a great inspiration to our community and we will continue his legacy.

Peter Gubser is survived by his mother Mary Gubser, his beloved wife Annie Yenikomshian Gubser, whom he met while living in Lebanon, their two daughters Sasha and Christi and their two granddaughters, Sky and Sophie.

Our thoughts are with Peter's family. We are grateful for his life and work.

Gratefully,

Bill Goussard



**Peter Gubser
1941-2010**

To send condolences to the Gubser family, please click here.

For those wishing to give a gift in Peter's memory, we have established the Peter Gubser Education Fund.



Thank you for your heartfelt recollections of Peter,
your kind thoughts and the donation you have made in his memory.

We appreciate your caring expressions of sympathy.

He lives on in our hearts.

Annie, Sasha and Christi Gubser
Annie, Sasha and Christi Gubser

Fall 2010 | Issue 170

ANERA News

Remembering Peter Gubser

Excerpted from a tribute delivered at ANERA's Annual Dinner on October 1 by Amb. Philip Wilcox, president of the Foundation for Middle East Peace.

All of us hope to leave this world a little better than when we entered it. Few have done more to accomplish this than Peter Gubser, ANERA president from 1978 to 2007, who died at the age of 69 on September 2, 2010.

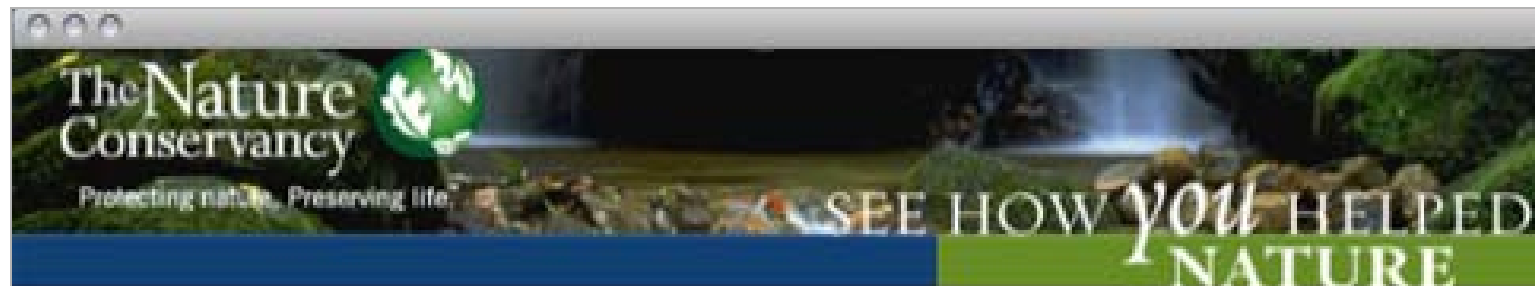
The ANERA community knew Peter as a friend and colleague, for his modesty, generosity, and selflessness. In Peter, there was no trace of ego or self aggrandizement. He glowed with warmth and good humor. He was great fun to be with.

Yet Peter was tough and strict in the standards he set, and a person of strength and integrity. Always calm, even-tempered, steady, and totally focused, he had great discipline and a large capacity for work. He stood out, impressively, as a leader.

his issue...

- Remembering Peter Gubser
- TA by the Numbers
- Member Well Spent
- Education Projects
- Annual Dinner 2010 Report

ANERA
Living Lives in the Middle East



Dear Loyal Conservancy Supporter,

Your support of The Nature Conservancy has made a difference in our natural world and we invite you to [view what you helped make possible](#).

In [The Nature Conservancy's 2008 Annual Report](#), you can read how your support is helping our practical, effective brand of conservation work on an unprecedented scale — protecting a remarkable 2.7 million acres around the world in fiscal year 2008.

Our collaborative approach to conservation allows us to ensure [meaningful and lasting results for the long-term](#) through our projects in all 50 states and more than 30 countries around the world.

[View our audio slideshow](#) to explore some of the places where your support is helping the Conservancy to achieve critical conservation successes, including:

The collage consists of two photographs. The left photo shows a person in a dark jacket kneeling on a white, possibly snowy or sandy, surface. The right photo shows a group of people, some in traditional African attire, in an outdoor setting. Above the photos is a blue banner with the text 'CONSERVATION ORGANIZATION' in white. Below the photos is a green banner with white text.

Your support is helping conserve nature worldwide. Learn more by reading our 2008 Annual Report.

[Download Now »](#)



The mission of The Nature Conservancy is to preserve the plants, animals and natural communities that represent the diversity of life on Earth by protecting the lands and waters they need to survive.

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[nature.org](#) > [About Us](#) > [Annual Report](#) > Conservation Highlights



Conservation Highlights

Year in Review 2008: Audio Slideshow

Conservation Connections

Annual Report 2008

The world is more interconnected than ever before. Places that once seemed insurmountably remote are now reachable by cell phone. Satellite cameras can take us to virtually any spot on Earth. Coffee served by a Seattle barista contains beans grown on three continents.

Celebrating Legacies for Nature

[READ STORIES OF HOPE](#)

[Read and watch Stories of Hope](#) shared by some of our Legacy Club members.

And now – The Downside

common “cracks” good gifts can fall through

When Good Gifts Go Un-Thanked

- Gift check left in President's jacket pocket until the following winter
- Gift check left on gala event table
- Gift made at a "house party" where staff didn't help host/hostess track donors
- Gift made by volunteer fundraiser (house party host/hostess or walker/runner/cyclist)
- Employer-matched gift (paid out by the employer); employee isn't thanked again



When Good Gifts Go Un-Thanked



- Gift made at museum facility admissions counter
- “Additional Gift” tacked onto membership / subscription purchase
- Gift made through “3rd-party” system
 - Network For Good portal (inc. Facebook)
 - Donor-advised funds
 - Mortgage-broker “share” plan, etc.

How to Build a Stewardship Plan

so that no gift goes un-thanked, or “under-thanked”



Rachel Muir
Client Strategy
Executive at Convio
& Founder of Girlstart

3 Donor Expectations

3 golden rules for any gift, regardless of size:

- Prompt, accurate, sincere appreciation for the gift
- Confirmation that the organization will use the gift as the donor intended
- Measurable results on how the gift was used



Furry Friends Animal Rescue

Recognition/Cultivation Step	Timeline	\$1 - \$249	\$250 - \$499	\$500 - \$999	\$1,000 - \$2,499	Action
Thank You Letter, Signed by ED with Tax Info (On Letterhead)	Within 24 hours	X	X	X	X	Print Letter for ED to Sign
Handwritten Thank You Note with Pet Photo	48 hours	X	X	X	X	Provide Card
Phone Call from ED or Development Director	48 hours		X	X	X	Provide Number
Note from Furry Friends Board Chair	2 weeks			X	X	Send Board Chair Info, Card
Call from Furry Friends Board Member	Within 2 weeks				X	Provide Number
Invitation to Tour Shelter, Mobile Spay/Neuter Clinic, etc.	As Appropriate				X	Send Invite
Note from Volunteer Shelter Worker, Veterinarian, Adopter, etc	2 months				X	Identify, Give Stationery
Holiday Cards	Send in November Every Year	X	X	X	X	Put Together Mailing List
Donor Listing in "The Scoop" Annual Report	Annual	X	X	X	X	
Invite to "Wag and Purr" Donor Appreciation Event	Annual	X	X	X	X	Plan, Organize

1. Prompt, accurate, sincere appreciation for the gift

Best Practices

- Goal: 24-48 hrs
- Don't exceed 5 days (but late is better than never)
- Allocate time and staff – more during the holidays
- Daily stewardship “power hour”

2. Confirmation that the organization will use the gift as the donor intended

Best Practices

- Goal: Follow through with specifics
- Know where the gifts are going
- Make your thank-you tangible, real, and specific

3. Measurable results on how the gift was used

Best Practices

- Goal: Show gift in action
- Detail the results
- Put a face on your gratitude: include pictures, videos, or stories where possible



Stump the Speaker

- Submit your org's name and mission in the chat box at the top of your screen.
- Rachel will recommend 3 creative stewardship ideas before the end of this session.
- **Submit your org now!**

Watch Your Timing

Quick Poll

Watch Your Timing

- Make prompt acknowledgement the rule, not a pleasant surprise.
- A timely thank you:
 - Affects donors' perceptions [of whether you needed their gift and how much you care]
 - Legitimizes your organization and mission
 - Needn't be constrained by channel, but manage different expectations wisely
 - Should not diminish attention to detail, such as entering the correct contact info

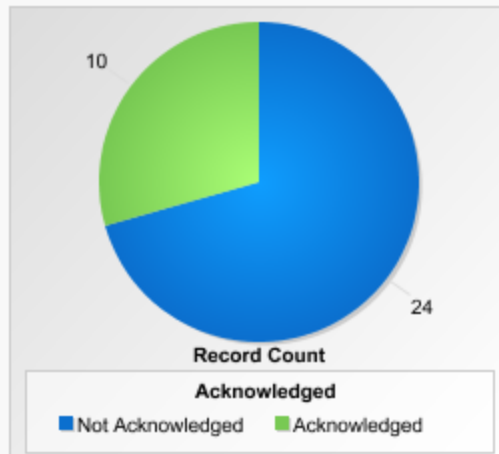
Technology can help

Dashboard

[Refresh](#)

Last refreshed at 11/29/2010 11:24 AM. Displaying data as Seth Staffer.

Gift Acknowledgements - Last 5 days



Unacknowledged Donations

Donation Name	Amount
Charles Sampson \$100.00 Single Donation 11/30/2010	\$100
Jacob Halbrook \$2500.00 Single Donation 12/02/2010	\$2K
David Maxwell \$50.00 Single Donation 12/03/2010	\$50
David Maxwell \$100.00 Single Donation 12/02/2010	\$100
David Maxwell \$100000.00 Major Gift 12/03/2010	\$100K
Charles Sampson \$50.00 Single Donation 12/02/2010	\$50

New donor gifts THIS MONTH

Account Name	First Hard Credit Amount
Trevor Wolpert Household	\$57
Donelle Gregory Household	\$80
Kelly Rolf Household	\$111
Lou Smith Household	\$50
Jackie Robinson Household	\$122
Mayumi Swanson Household	\$112
Alanna Koos Household	\$500

My Tasks

[New](#)

Complete	Date	Subject	Name	Related To
X	12/1/2010	<u>Acknowledge Major Gift closed</u> !		<u>Jacob Halbrook \$2500.00 Single Donation 12/02/2010</u>

Technology can help



Dashboard

Executive Director Dashboard

[Go to Dashboard List](#)

View Dashboard

Type here to search for dashboard ...

Edit

Clone

Refresh

Acknowledgement Status

Gifts Received over 5 days ago



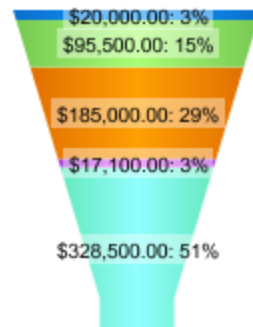
100%
Sum of Amount

Acknowledged

Acknowledged

Major Gifts Status

Major Gifts December 2010



Sum of Amount

Stage

Prospecting

Cultivation

Solicitation

Closed Lost

Received

New Donations this month \$1k +

Donation Name	Amount
David Maxwell \$100000.00 Major Gift 12/03/2010	\$100K
Jacob Halbrook \$2500.00 Single Donation 12/02/2010	\$2K

Technology can help

Filtered By: [Edit](#)
 Donation Record Type equals Major Gift [Clear](#)
 AND Stage equals Identification,Prospecting,Qualification,Cultivation,Solicitation,Closed Won,Closed Lost,Received [Clear](#)

	Donation Owner	Donation Name	Type	Donation Record Type	Amount	Close Date	Account Name	Primary Contact
<input type="checkbox"/>	Stage: Prospecting (2 records)							
					\$20,000.00 avg \$10,000.00			
	Scott Romig	Scott Romig - \$10,000 Major Gift -12/20/09	Individual Gift	Major Gift	\$10,000.00	6/17/2009	Scott Romig Household	Scott Romig
	Scott Romig	Bob Jones \$10000.00 Major Gift 12/09/2009	Individual Gift	Major Gift	\$10,000.00	12/9/2009	Bob Jones Household	Bob Jones
<input type="checkbox"/>	Stage: Cultivation (4 records)							
					\$95,500.00 avg \$23,875.00			
	Seth Staffer	Trevor Brooking \$25000.00 Major Gift 06/30/2010	Individual Gift	Major Gift	\$25,000.00	6/30/2010	Trevor Brooking Household	Trevor Brooking
	Watt Hamlett	Ranco Corp. \$500.00 Major Gift 10/08/2010	Organization Gift	Major Gift	\$500.00	10/8/2010	Ranco Corp.	Ranco Corp.
	Adelle Caravanos	Samantha Smith-Brown \$50000.00 Major Gift 05/12/2010	Individual Gift	Major Gift	\$50,000.00	5/12/2010	James Brown Household	Samantha Smith-Brown
	Adelle Caravanos	Barbara Shefter \$20000.00 Major Gift 11/25/2010	Individual Gift	Major Gift	\$20,000.00	11/25/2010	Alan Shefter Household	Barbara Shefter
<input type="checkbox"/>	Stage: Solicitation (4 records)							
					\$185,000.00 avg \$46,250.00			
	Adelle Caravanos	Patrick Keeler \$10000.00 Major Gift 04/30/2010	Individual Gift	Major Gift	\$10,000.00	4/30/2010	Patrick Keeler Household	Patrick Keeler
	Adelle Caravanos	Mark Lee \$25000.00 Major Gift 06/25/2010	Individual Gift	Major Gift	\$25,000.00	6/25/2010	Mark Lee Household	Mark Lee
	Adelle Caravanos	Annie Maxwell \$100000.00 Major Gift 10/15/2010	Individual Gift	Major Gift	\$100,000.00	10/15/2010	David Maxwell Household	Annie Maxwell
	Taryn Robinson	Jackie Robinson \$50000.00 Major Gift 04/01/2010	Individual Gift	Major Gift	\$50,000.00	4/1/2010	Darnell Robinson Household	Jackie Uperesa Robinson
<input type="checkbox"/>	Stage: Closed Lost (5 records)							
					\$17,100.00 avg \$3,420.00			
	Kelli Anderson	Rodney Howell \$3000 Major Gift - 07/07/2008	Individual Gift	Major Gift	\$3,000.00	7/7/2008	Rodney Howell Household	Rodney Howell
	Seth Staffer	Sarah Cunningham \$1200 Major Gift - 12/01/2008	Individual Gift	Major Gift	\$1,200.00	12/1/2008	Sarah Cunningham Household	Sarah Cunningham
	Seth Staffer	Trevor Brooking \$5000.00 Major Gift 03/28/2009	Individual Gift	Major Gift	\$5,000.00	3/28/2009	Trevor Brooking Household	Trevor Brooking
	Seth Staffer	Molly Bresnen \$900.00 Major Gift 12/31/2009	Individual Gift	Major Gift	\$900.00	12/31/2009	Molly Bresnen Household	Molly Bresnen
	Adelle Caravanos	Samantha Smith-Brown \$7000.00 Major Gift 10/03/2008	Individual Gift	Major Gift	\$7,000.00	10/3/2008	James Brown Household	Samantha Smith-Brown



Stump the Speaker

Creative stewardship ideas

Q&A

Ask Rachel

2 Quick Polls

Then we'll announce the winner...

WINNER!

Free 1:1 Consultation for a
Personalized Stewardship Plan



Thank you!

Questions?

- Convio: info@convio.com or 888.528.9501
- Need more influence during budget planning season?
- Visit convio.com/influence for a guide to securing budget for the Common Ground donor management software demonstrated today
- Can manage ALL your contacts: donors, volunteers, program participants, press contacts, public officials, all in one database
- Estimate \$100 per month per administrator