

# Stewardship: Recognizing and Reconnecting through Events



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**Director of Donor Relations & Special Events**





## What is *Donor Relations*??

- o A two-way, personalized communication between the donor and the institution
- o Movement of the donor from awareness to ownership
- o "It is just good manners to say "Thank you" in an appropriate way; it completes the donor solicitation cycle; and it is the beginning of a lifetime relationship between the organization and the donor." **Dr. Edward H. Pearce**, Associate Director, Department of Development, **Queen's University**.



## **Goals of Donor Relations**

**To Acknowledge**

**To Recognize**

**To Inform**

**Donor Relations is part of the gift cycle of  
identification, cultivation,  
solicitation and stewardship**



## **Why do donors give?**

- **They believe your organization is making a difference in a cause they care about.**
- **They value the work your organization is completing and want to support it.**
- **Their gifts are investments in the work they expect to see accomplished.**



## What donors want

- People who give **want to see what their gifts to your institution allowed you to accomplish** – specific facts and stories of how their gift helped to change the lives (or will change the lives) of real people.
- Donors want to know how their money was put to best use by your institution.
- **47% want to be personally involved** – there has been an increase in “entrepreneurial” giving, donors give not just \$\$ but their time and engagement!



- **According to Penelope Burk's research, donors say they have three main needs:**
  - Prompt gift acknowledgement
  - Confidence that their gifts have been "sent to work" as intended
  - Measurable results of gifts at work before another gift is requested
- **Burk's research found:**
  - Formal recognition in the absence of information puts donors in the awkward position of having to accept praise without knowing what they have achieved.
  - Rather than being praised, she says, **people want to know what you're doing with their money.**



## What donors do not want

- **Trinkets, baubles, events with no meaning.** Donors feel these items are worthless, not an incentive to give, a waste of money, and send the wrong message to donors
- **Research shows that many donors don't want formal recognition, just information – facts and statistics**



## *For donor centered events - who is your client?*

- The persons or group that are the direct beneficiaries of a project or service. They are the people for whom the project is being undertaken.
  - This could be an MGO, VP, President or the donor him/herself
- This term can also include other staff members in your department, administrators, your supervisor, students, faculty/staff, etc.



- There is no true understanding of the many details involved in the planning of even the simplest of events
  - **Most of our clients think we order food and alcohol, purchase a few decorations and have an event.**
- For example –
  - Space rental,
  - Parking,
  - VIP seating,
  - What color does the President/Chancellor/Dean/Director like best
  - Who is allergic to what foods
  - Who can't be seated beside whom, etc.
  - Who talks too loud to be seated in the front row of tables/the auditorium
  - What brand of wine/alcohol does the President prefer
  - How many people does a 60 inch round seat



- Then of course, there are the problems we have to deal with that someone who has never planned an event can never fathom – such as:
  - alumni stealing bottles of liquor off the closed bar;
  - guests who have imbibed a little too much falling off of loading docks;
  - guests who are irate over a misspelled name badge (when it is printed exactly as they filled it out on their rsvp card!);
  - guests who lock themselves in bathroom stalls and can't get out
  - I am sure you all have stories you could share.



## Explain What You Do to Your Client

- Have an Event Request Form or other record keeping tool for when a project request is received
- Set ground rules for client(s) involvement in the planning process
- Keep your client(s) updated as you plan – use checklists or timelines for each project



## Build Relationships

- Anticipate needs of the client, donor, leadership
  - **Checklists, BSA's, timelines, talking points**
- Respect their time
- Ask for input – but **be careful what you ask**
- Give insider information
- Always, always say “Thank-you!!”



# Challenges in planning events

- Many different stakeholders
  - donors, administration, MGO's
- Shifting goals
- Time
- Budget
- Communication – internal & external



## *A Little Help From Above*

- Does the **top administrator(s)** in your department and at your institution understand your job and the goals of the event?
  - **Thanking the donor**
  - **Showcasing a faculty member, student, research or new facility**
  - **Showing prospective donors/alumni/friends opportunities for philanthropy**
  - **Reconnecting lapsed donors or alumni/friends/patients to your institution**

**If not – go back and start at the beginning!**



# Working with a small budget:

- **Cost-share with other departments when you are able to do so**
- **Serve wine and beer only – NO liquor**
  - Serve a specialty drink, one alcoholic and one non-alcoholic
- **Plan the time of the event so you can serve hors d'oeuvres, afternoon tea or breakfast/brunch**
- **Utilize students and/or faculty for entertainment**
- **Recycle and reuse**
- **Think about your printed materials – what is really necessary?**
- **Use evites and email communication when appropriate**
  - Faculty, staff and students
- **Order gifts in large quantities when possible and split cost with other departments or reuse for events where the attendees will be different**
- **When you can – make the donors gift personal, not costly! Donors will appreciate something that comes from the heart more than a \$1000 Steuben**



# Printed Materials





## Printed Invitations & Programs



Experience the soul of medicine at Duke.  
Your choice. Our promise.

 **Duke Integrative Medicine**



Building Dedication  
November 30, 2006



 **Duke Integrative Medicine**

Duke Integrative Medicine has built a first of its kind facility designed specifically with the principles of integrative medicine in mind. At Duke, we are committed to exploring and demonstrating innovative models of care and addressing the short comings in today's health care system. From the lessons learned in this living laboratory, we will integrate changes in hospitals and clinics throughout the Duke health system, as well as in our community.

Strategically located in close proximity to medical and educational facilities, the Center is a 27,000-plus square foot building situated next to the woodlands and streams of the Duke Forest.

Duda/Paine Architects, in Durham, N.C., together with the founders of Duke Integrative Medicine have incorporated inspirational elements found on the Duke campus into a building that reflects the spirit of the work that goes on within its walls—an entirely new approach to health care.

Experience the  
soul of medicine  
at Duke.

*Imagine a time when, after visiting your doctor, you feel rejuvenated and replenished... A time when the visit itself is an experience in health and healing... A place where you immerse yourself in new, healthy ways of living and have the ongoing support to reach your health goals after you return home.*



*New dimensions in health and healing.*





# Email Invitation Example

*David H. Murdock  
Owner and Chairman of the  
Board  
Castle & Cooke, Inc. and Dole  
Food Company, Inc.*

*Richard H. Brodhead  
President  
Duke University*

*Victor J. Dzau, MD  
Chancellor for Health Affairs  
Duke University  
President & CEO  
Duke University Health System*

*are pleased to invite you to  
a  
Special Announcement of  
Collaboration  
between*

*Duke University Medical  
Center  
and the  
North Carolina Research  
Campus*

*Monday, September 24<sup>th</sup> at  
12:30 p.m.  
North Carolina Research  
Campus  
Kannapolis, NC*

*Please respond to  
[Pbeaver@castlecooke.com](mailto:Pbeaver@castlecooke.com)  
704-273-1181*



# \$1M donor Gifts





## *Process, Process, Process*

- **Do you have an event request process in place?**
  - **Has it been approved** by your supervisor and/or department head?
  - **Sort through the requests** you receive to plan events, meetings, or do all of the other tasks people in our positions are generally asked to do
  - What will make the most impact in the life of a donor and for your institution? **Rank those requests!!**



- If not – put one in place as soon as possible.
  - **Prioritize projects** for which you are responsible
  - Decide **how much you can handle**.
    - **Formal form**
    - **List of all of the projects on which you are currently working**
    - **Calendar with the events you are responsible**
    - **What ever works for you!**

As planners we all tend to be ***workaholics!***

This means we hardly ever say **“NO”**

when asked (or told) to take on a project or task.



## *Take a little time for yourself and everyone will benefit....*

- You can not plan a wonderful event if you are constantly exhausted from juggling event after event or task after task.
  - Almost everyone will realize that a burned out employee is not going to be productive
- It's okay to let others know that you have a life outside of work too!





# *Dealing with the Administration*

## **Bureaucracy**

An organization typified by formal processes, standardization, hierarchic procedures, and written communication.

- Learn the processes in place at your institution, and work with them
- Know the hierarchy and use it to your advantage
- Written Communication can work for all of us!



## ***A note on donor recognition events:*** Need to recognize vs. appearance of wasting money

Many donors feel that recognition events are **repetitive, boring** and **simply too long**. In fact, being kept personally informed of what the gifts were achieving is the most important and valued form of donor recognition.

- Challenge is to balance the very real need to recognize with the need to avoid creating an impression that you are wasting money. Some of the key success factors for recognition events:
  - **Demonstrate the gift at work.**
  - **The location should be suitable and fit the occasion and the gift.**
  - **The entertainment and food need to be appropriate, up to an acceptable standard, but not overdone.**
  - **The ambiance must fit the occasion and the mood.**

*Penelope Burk – “Donor Centered Fundraising”*



*Let Go!*

**You Can't Do It All...  
Even Though You Try...**

- Learn to delegate
- Hire or train a staff you can trust
- Hire temporary workers for big events
- Out source – use vendors to help you!





Remember:  
What you do does make a difference!

Helping those who can't help themselves...





# New Buildings...

*Duke Integrative Medicine*  
– given by Christy R. Mack  
and her husband, John  
Mack





# Duke Integrative Medicine Dedication





# New School of Nursing





# Professorships for faculty



***James H. Semans, MD Professorship  
in Urologic Surgery***

**Given through the generosity of the  
late Dr. James H. Semans, the Mary  
Duke Biddle Foundation, and the  
Division of Urologic Surgery**



# Annual Fund Donor Recognition: Davison Club Celebration





# Students



Duke University School of Medicine



## Affording Opportunity

Rachel Mesis, MD'07, Duke Surgery resident  
*Thank you Davison Club!*  
\$1,020,507 for Scholarships in 2006-07

Duke University School of Medicine

## Developing Leaders and Scholars

*Thank you Davison Club!*  
\$340,169 for Curriculum in 2006-07





## **Largest Gift** in Duke University School of Medicine History to Fund Landmark Study

***“A Framingham Study for the Molecular Age”***

- Duke University received **\$35** million from billionaire real estate developer David H. Murdock to support a massive biomedical research project at the North Carolina Research Campus (NCRC) in Kannapolis, N.C.

Your comments, thoughts,  
suggestions, stories to share....

