

**IPMA** Patton McDowell & Associates, LLC

**Fund Development Counsel & Organizational Strategy to elevate your cause.**

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**Creating a Roadmap for Success**

Stewardship:  
More Than Just "Thank You"

December 8, 2011

*Creating a Roadmap for Fundraising Success:  
A Three-Part Workshop Series on the Development Cycle*

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**Goals**

- Review development cycles: resource & audience
- Define solicitation and stewardship
- Discuss solicitation: Prospect Research & Case for Support
- Building relationships: Stewarding your donors
- Generating a stewardship plan
- Q&A

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**Resource Development Cycle**

```

    graph TD
      IDENTIFY --> COMMUNICATE
      COMMUNICATE --> CULTIVATE
      CULTIVATE --> SOLICIT
      SOLICIT --> STEWARD
      STEWARD --> IDENTIFY
  
```

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**Audience Development Cycle**

```

    graph TD
      Awareness[Awareness of Organization] --> Consideration[Consideration of Programming]
      Consideration --> Participation[Participation/Attendance]
      Participation --> Understanding[Understanding/Engagement]
      Understanding --> Awareness
  
```

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**Solicitation**

- How do you determine who makes the ask?
- When is the ask made?
- What is the process for determining the size of the ask?
- Where do you get your donor information?

## Common Errors When Soliciting Donors

1. Talking too much
2. Depending on scripts
3. Under-preparing for meetings
4. Fear of hearing "No"
5. Forgetting to make the ask

## Understanding Prospect Research

- Developing profiles on potential donors
- Information that can inform the ask
- Gain an understanding of what is important to the donor

## Case for Support

- A solid case is needed regardless of the type of campaign
- Element of a Case
  - Mission/Vision
  - Details of the campaign
  - Who the campaign will benefit
  - How the donations will be used
  - Testimonials & Case Studies

## Solicitation Vehicles

- PowerPoint
- Video
- Campaign Prospectus
- Annual Report
- One-page summary
- Live testimonials

## Activity

- Making the ask
  - In groups, describe an ask that went well and an ask that did not
    - How did you prepare?
    - What materials did you provide?
    - What questions did you ask?
    - How did you ask for the donation?

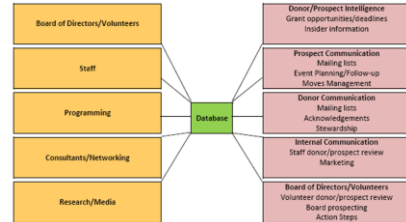
## Introduction to Stewardship

- Ensuring donor comfort with an organization
- Building strong relationships beyond the donation
- Learn what is important to donors and exceed expectations
- Prepare all members of the organization for stewarding donors

## Prepare your Stewardship Plan

- Information entered into database is critical
  - How does your organization track/manage donor acknowledgements?
- Personalizing acknowledgements
  - Look beyond pre-printed acknowledgements

## Data Flow



## Stewardship Activities

- Letters
- Emails
- Public Acknowledgements
- Newsletters
- Engage donors into service (Boards, committees, event planning)

## Activity

- Preparing a Stewardship Plan
  - Does your organization have a plan in place?
  - Who ensures the plan will be carried out?
  - Who is involved in your plan?

### THANK YOU!

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