

Improving Donor Relations...Stewardship

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Prospects/ Donors

Interchangeable?

So where does the \$\$ come from?

The 4 Sources of Contributed Revenue

Individuals

Corporations

Foundations

Government

Time for Pie...

A quick exercise

The 80/20 Rule

At LEAST **80%**
of ALL giving in the US
comes from INDIVIDUALS

So who are these people that give...

...and why do they do it?

*The Seven Faces of Philanthropy: a New
Approach to Cultivating Major Donors*

Russ Alan Prince

Karen Maru File

Publisher: Jossey-Bass

The Research...

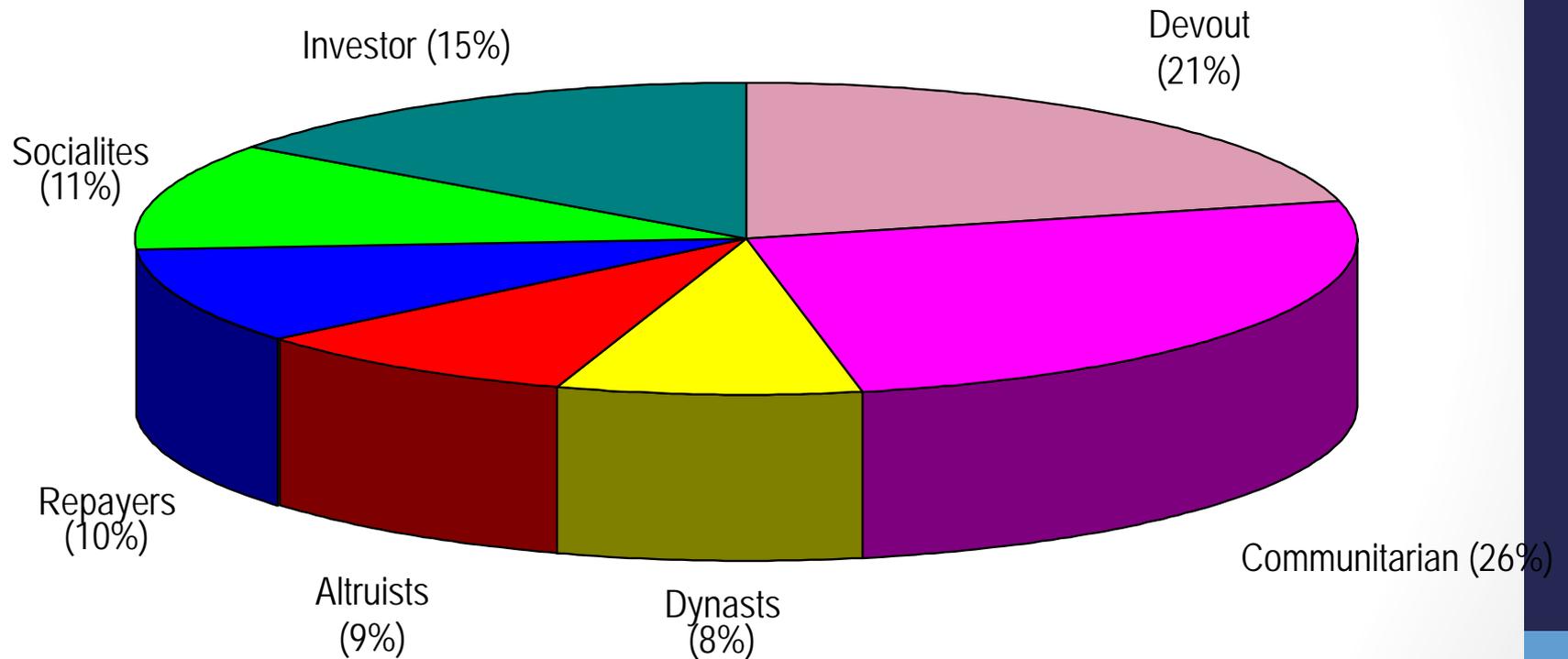
- Philanthropically motivated
- Donors of \$50,000 or more
- Assets of \$1 million or more
- Men and women

The Results...

- Subcultures of philanthropy
- Seven segments
- What people seek
- The values behind their giving

Seven Faces of Philanthropy...

Segments



The Communitarian (26%)

- ***“Doing good makes good sense.”***
- Local history, roots and giving
- Success tied to success of community
- Philanthropy is exchange

The Devout (21%)

- ***“Doing good is God’s will.”***
- 96% of giving focuses on religion
- Supports outreach and mission work
- Act on faith in institutions

The Investor (15%)

- ***“Doing good is good business.”***
- Give carefully after investigation
- Look for measurable ROI
- Philanthropy is a business relationship
- **Tax avoidance** is a high motivator

The Socialite (11%)

- *“Doing good is fun.”*
- Motivated by creativity of event planning
- **Fund raisers** more than donors
- Philanthropy as **social exchange**

The Repayer (10%)

- ***“Doing good in return.”***
- Response to life-changing experience
- **Highly focused** giving
- Emphasis on results and beneficiaries

The Altruist (9%)

- ***“Doing good feels right.”***
- Genuine selfless donor - internally driven
- Wealthy have greater obligation to give
- Not influenced by others

The Dynast (8%)

- *“Doing good is a family tradition.”*
- Philanthropy is a strong family value
- Most careful and selective of all
- Focus on **core mission** of institutions

What are the Structural Elements
of a successful Development Plan?

Individual Giving



- Grass Roots/“Click Here” to Give



- Membership Level



- Major Gifts

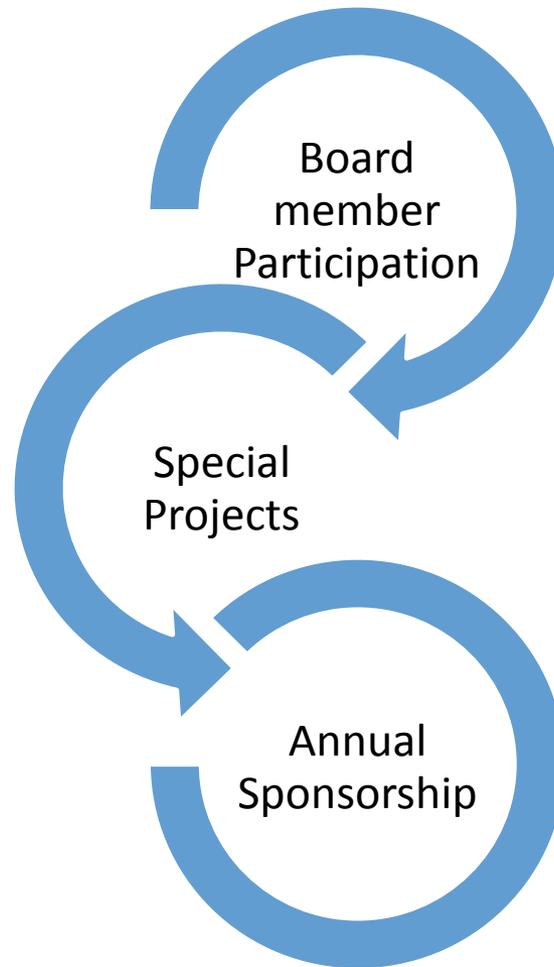


- Planned Gifts/Endowment

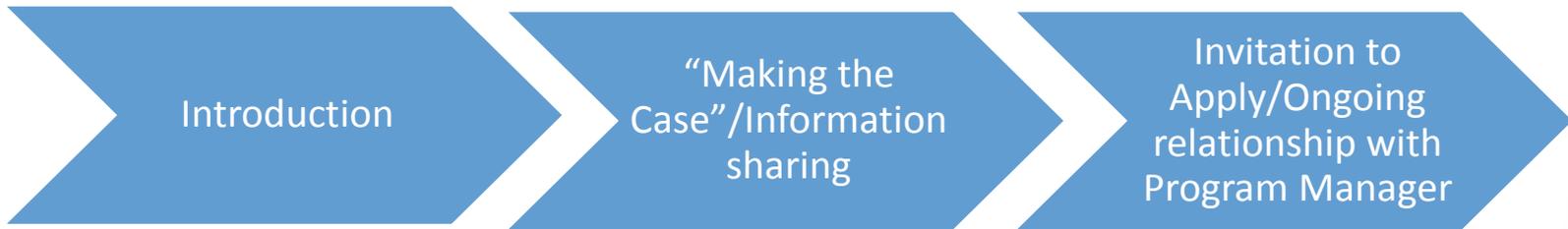


- Capital Campaign/Special Projects

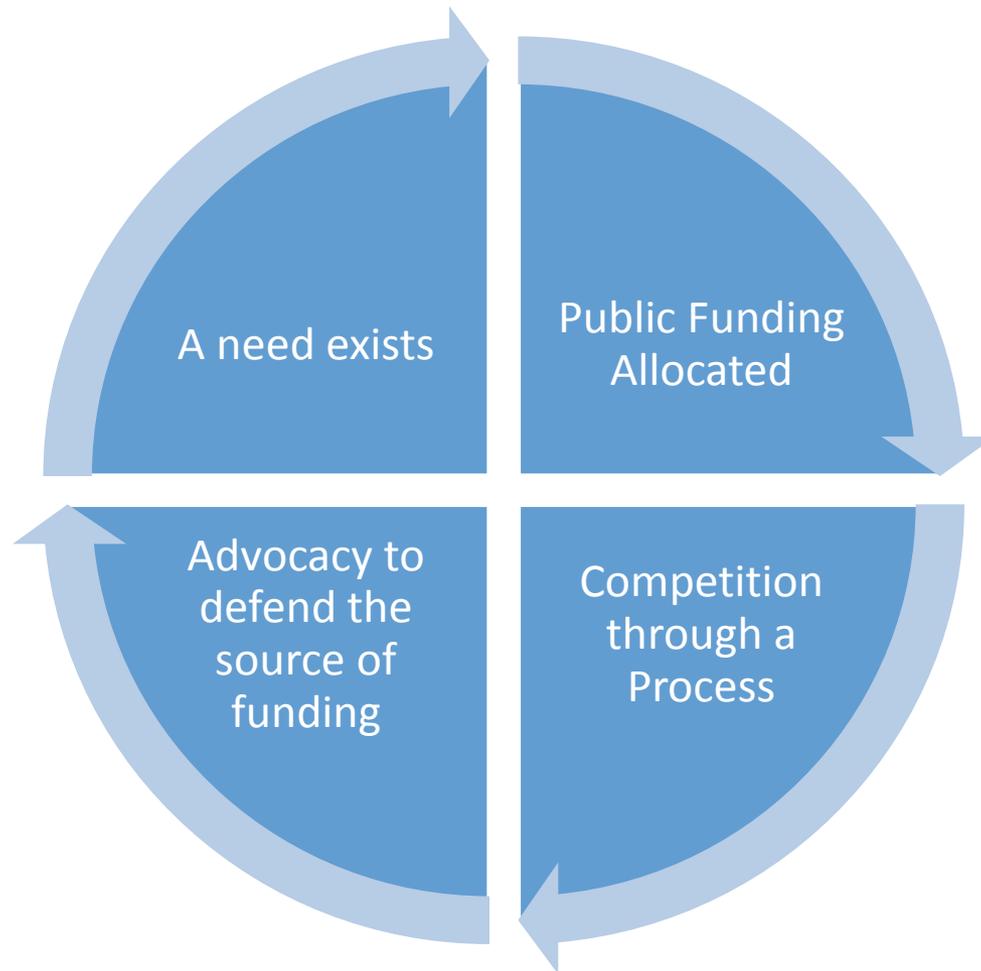
Corporations



Foundations



Government



Once we have these Donors...

How do we keep them?

So what's "the secret" to
success?

...Stewardship

A “Long” Story

The Process of “Moves Management”

Science in action...

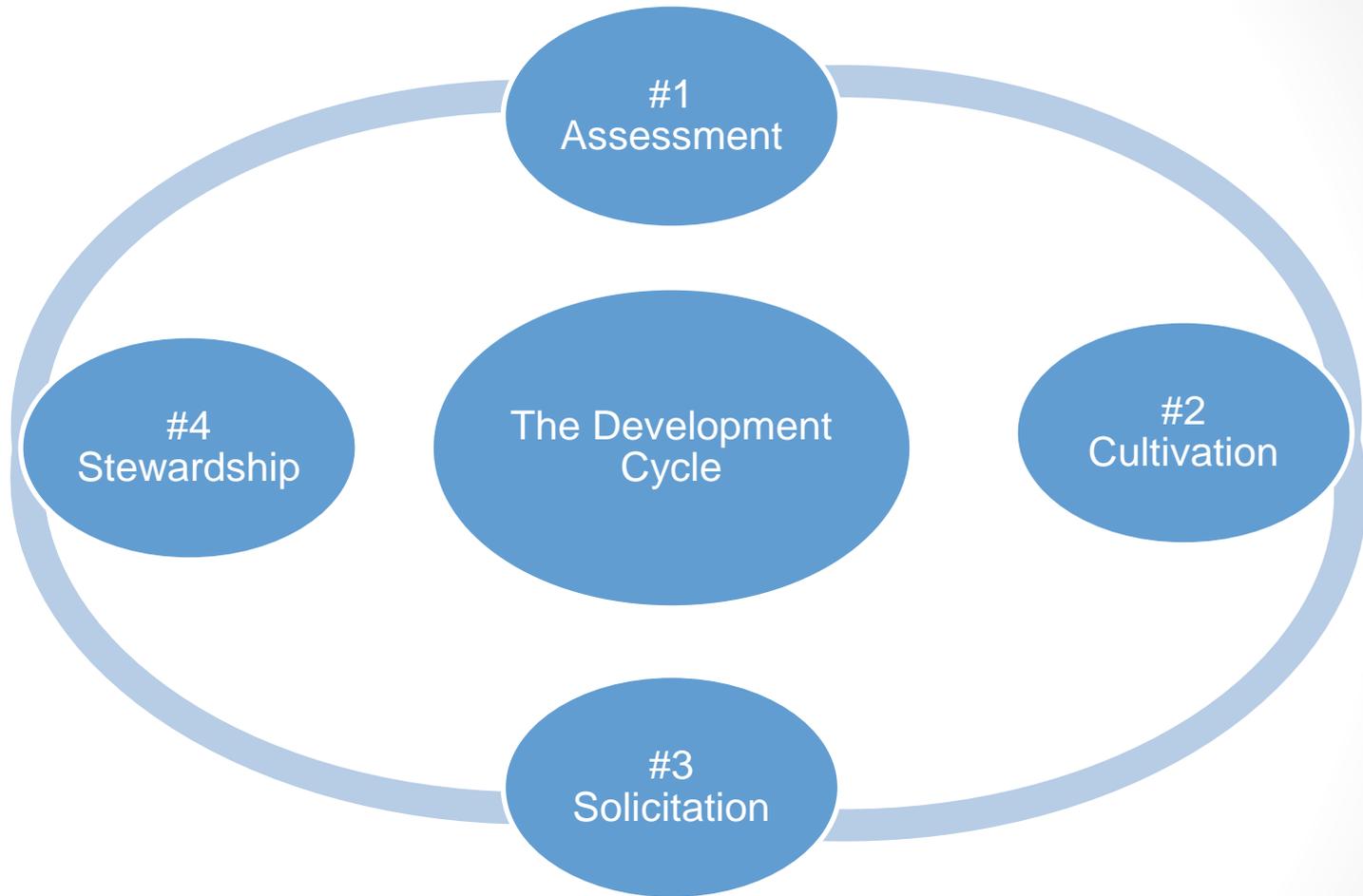
What are you tracking?

Everything...

Relational Data Bases

Card file or Raiser's Edge
Garbage in...Garbage out

The Development Cycle



Step 1: Assessment...

The Science of:

- Identifying prospects
- Gathering and utilizing information
- Qualifying prospects
 - Qualified Donor
 - Unqualified Donor
 - Wait List
- Why we need it?
 - Knowledge conquers fear

Step 2: Cultivation...

The Art of:

- Sharing your mission
- Friend-raising
- Developing a trust relationship

Step 3: Solicitation...

The Moment of Truth...

“ The Ask ”

Step 4: Stewardship...

The many ways... to say “Thank You”

- The process of expressing gratitude commensurate with the gift
- **Obligation** to acknowledge a gift 5-7 times before asking for the next gift...

...and the cycle begins

AGAIN...

The “secret” of successful fundraising...

It's **ALL** about relationship building