Stewardship and Donor Relations

“Stewardship” comes from an old English word meaning “keeper”.

Also defined as “the careful and responsible management of something entrusted to one’s care.”
Stewardship and Donor Relations Team

Susan Rankin, Director
- Overall management of program
- Customized stewardship planning for principal level donors ($250,000 lifetime giving +)
- Policies and procedures
- Guidance and advice to all areas of UA and the University on stewardship activity

Claire Dolan, Assistant to the Director
- Financial budget management
- Calendar management
- Event and project support
Stewardship and Donor Relations Team

Claudia Russell, Senior Development Officer
• Donor reporting and accountability
• Gift agreement consultation and management
• Endowed/term chair reporting and management
• Principal donor stewardship ($250K+)
• Student Awards liaison for UA

Wendy Battram, Senior Development Officer
• Donor recognition and event management
• Donor recognition including formal gift announcements, event coordination, etc
• Campus physical donor recognition
• Cumulative donor recognition
• Principal donor stewardship ($250K+)
Stewardship Principles at McMaster

- **Accountability**
  - Donor reporting, careful gift documentation, gift agreements

- **Impact**
  - Sharing the stories, inform and infuse donors with pride about their gift(s)

- **Customization**
  - Impact and investment reports, stewardship based on donors’ needs and preference

- **Recognition**
  - Personalized (donor centered), appropriate to size of gift, consistency across campus, naming opportunities
Stewardship Principles at McMaster

• Creativity
  - Innovative and non-traditional stewardship strategies

• Excellence
  - Accuracy, attention to detail, resource on campus

• Culture
  - Stewardship is a team effort!

• Affinity
  - Strategic donor participation in McMaster community, strengthen donor relationships, on-going cultivation.
Key Strategies

• **Foster a reputation** for careful and responsible stewardship

• **Create a culture of stewardship** at McMaster

• **Collaborate with all areas of UA**

• **Inform and infuse donors with pride** about the effectiveness and impact of their gifts

• **Affirm to donors the value of investing** in McMaster

• **Focus on principal donors**, $250K lifetime giving
Questions?

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