

JULY 2018

FISCAL YEAR
2019

DONOR RELATIONS & STEWARDSHIP



STEWARDSHIP OVERVIEW

QUARTERLY REPORT & STRATEGIC PLAN



UNIVERSITY OF
GEORGIA

DEVELOPMENT & ALUMNI RELATIONS



Thank a Donor Day 2018

welcome!

THANK YOU FOR YOUR INTEREST IN UGA'S OFFICE OF DONOR RELATIONS AND STEWARDSHIP!

I hope our Stewardship Overview and Matrix provide you with a comprehensive summary of our work. With up-to-date metrics as of July 1, 2018, this issue illustrates our growth over five-years, current plans, and future goals for FY19 and beyond.

Both the quantity and quality of our work progresses with each quarter. In FY18 alone, we've gained new employees, hosted a record-breaking Thank a Donor Day, implemented our first individual impact report, collaborated with the Career Center and Alumni Association to develop new programs, completed the first cycle of our newly updated Presidents Club, and continued to move our mission of gratitude and teamwork forward.

I welcome any questions and would love the opportunity to introduce you to our talented team that makes it all possible.

Tony

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DONOR RELATIONS & STEWARDSHIP

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*"All shops could learn from
this... It could be used as a
handbook for stewardship."*



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INTRODUCTION

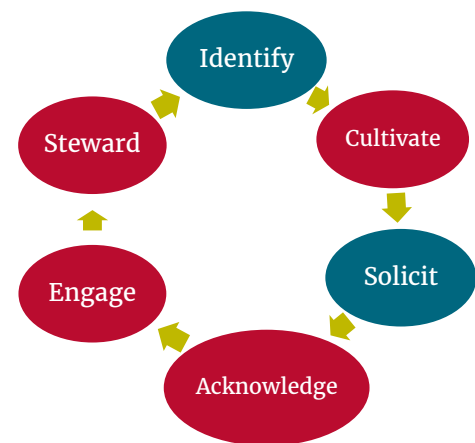
MISSION & VISION

Donor Relations and Stewardship sustains and nurtures lifelong relationships with University of Georgia donors by cultivating, acknowledging, engaging, and recognizing donors through stewardship programs and events.

**Our office asks the important question,
“How do you turn donors into loyal supporters?”**

We think the answer is an effective “thank you.”

Our donor-centered strategy is accomplished through timely and appropriate gift acknowledgement, fund investment and impact reporting, donor recognition, donor appreciation, special communications, and enhanced stewardship based on the unique needs of the donor. Through thoughtful and consistent contact, Donor Relations and Stewardship assists in fundraising by enriching lifelong relationships with University donors. Our efforts instill trust that donors' gifts and investments are impacting the University and broader community in a meaningful way.



COMMIT TO GEORGIA

Beginning with the silent phase in 2012, the University of Georgia announced the public phase of its \$1.2 Billion capital campaign, *Commit to Georgia*, in the fall of 2016. Coinciding with a University-wide rebranding, Donor Relations and Stewardship has taken the immediacy and excitement that comes with these events to reorganize, implement new programs, and update existing stewardship. This campaign hopes to change the lives of thousands of students, fund world-changing research, expand the university's land-and-sea-grant missions, and continue a tradition of excellence. We are endlessly grateful to steward our University family of passionate, cause-driven people who commit to improving our state, nation, and world.

Simply put, without our donors, the University of Georgia would not be what it is today.

We invite you to see how we say THANK YOU to those who Commit to Georgia.

2018: A YEAR BY THE NUMBERS

JULY 1, 2017 TO JUNE 30, 2018

613 SCHOLARSHIP
RECIPIENTS
& **116** ENDOWED FACULTY *said*
"THANK YOU!"

SCHOLARSHIP FUNDS INCREASED BY 88% AND
FACULTY SUPPORT INCREASED BY 18 NEW POSITIONS



2018 THANK A DONOR DAY

INCREASED BY 24%
with its largest attendance yet...

969
PARTICIPANTS!

103 more donors gave a second
consecutive year than in FY17

&

3,156 more donors gave a third
(or more) year in a row!

PRESIDENTIAL GIFT ACKNOWLEDGEMENTS

increased *significantly* by
752 more gifts of \$10K+ and pledges of \$25K+ than in fiscal year 2017

64%

ENDOWED FUNDS

that receive individual financial reports increased 12% to

2,097

2 new
employees!

1ST individual
impact report

1ST endowed faculty
impact report

NEW annual giving
society threshold

UNIVERSITY-WIDE FUNDRAISING

2018 marked a fifth consecutive year in greater giving

\$242 MILLION

RAISED IN FISCAL YEAR 2018

6% TOTAL INCREASE IN GIVING SINCE 2017



Not everything that counts can be counted, and not everything that can be counted counts!

-WILLIAM BRUCE CAMERON

ACKNOWLEDGEMENT

All gifts received by the University of Georgia Foundation are acknowledged with the University's official gift receipt, which contains a thank you message from the VP for Development and Alumni Relations and includes a Georgia Donor decal. This standard response is supplemented in many instances by additional forms of acknowledgement, including Presidential acknowledgements generated by Donor Relations and Stewardship, as well as letters generated by schools, colleges, and units across campus.

PRESIDENTIAL GIFT ACKNOWLEDGEMENT

Presidential Stewardship Coordinator

Gifts of \$10,000 and above are acknowledged quickly, accurately and appropriately with a letter signed by the President of the University. We are responsible for generating these letters to let donors know that their financial support is gratefully received, vital to our school and community, and being used according to their stated wishes and expectations.

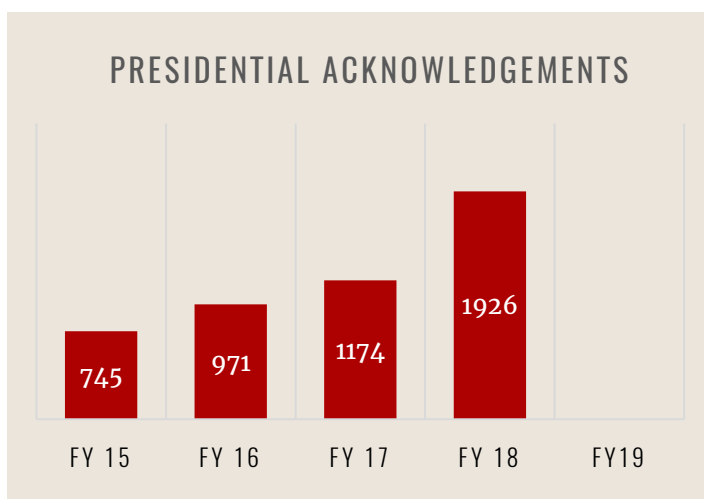
Along with gifts of \$10,000 and above, presidential letters are also generated for all newly established pledges beginning at \$25,000; these donors are acknowledged again when their pledge is fulfilled.

We also edit presidential letters written by Gift and Estate Planning welcoming donors into the Heritage Society (see Recognition on page 16). Special circumstances as indicated by the President's Office are also acknowledged.

The process for Presidential Acknowledgement was updated in 2011, and Donor Relations and Stewardship began recording this information in 2012.

For historical data regarding this and other projects, please contact the Donor Impact Coordinator for past Marketing Overviews.

WEEKLY MAILING



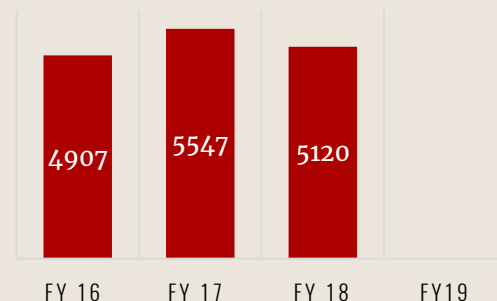
PRESIDENTS CLUB WELCOME ACKNOWLEDGEMENT

Presidential Stewardship Coordinator

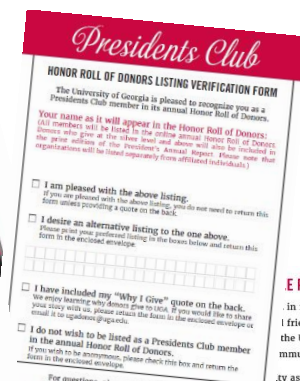
Named to honor the past leadership of the University of Georgia, Presidents Club recognizes donors whose annual gifts total \$1,500 or more (see Recognition on page 16). Annual membership is based on the University's fiscal year (July-June) and is renewable. Since many donors reach this level after giving multiple gifts to different units, Donor Relations and Stewardship began sending members a Welcome Packet explaining the significance of their gift and recognition level. They are also given an annual Presidents Club lapel pin and the opportunity to change their Honor Roll listing and/or request anonymity. This immediate acknowledgement and expression of gratitude to Presidents Club qualifiers is sent in a thoughtful, appealing packet that reinforces appreciation among our most generous supporters and encourages a habit of annual high-level gifts.

MONTHLY MAILING

PRESIDENTS CLUB WELCOME PACKETS



Presidents Club Welcome Packet stewardship efforts began in 2014.



THE PRESIDENTS CLUB

In 1973, the Presidents Club is comprised of friends whose annual support makes a difference in the lives of the University of Georgia's students, faculty, and communities they serve.

Aspiring to greatness must have benefited from a leadership role in supporting its mission. The Presidents Club members is a significant part of UGA's commitment to inspire future generations to advance global research, and improve lives everywhere.

PRESIDENTS CLUB BENEFITS

- All members will receive Presidents Club pins as part of their welcome packet each year. The 2019 Presidents Club pin recognizes your leadership level gifts given during the University's fiscal year 2019, which runs from July 1 to June 30, 2019.
- In August 2019, members will receive a Presidents Club decal that corresponds with their giving level, based on cumulative giving total achieved during FY19.
- All FY19 members will be invited to the Presidents Club Reception in the fall of 2019.
- All members will receive a bi-annual digital newsletter detailing the impact of the Presidents Club's generosity.
- All members will be listed in the online annual Honor Roll of Donors. Donors who give at the silver level and above will also be included in the print edition of the President's Annual Report.



My sincerest gratitude for your support as a Presidents Club member for the 2019 fiscal year. If you are a new member, welcome to the club. If you are a returning member, thank you for your continued commitment to the University of Georgia.

Our University would not be what it is today without leaders like you who believe in the power of public higher education. Every day, we commit to changing lives through world-class education. We strive to open doors to new possibilities for our students. We also strive to inspire leaders who are driven to improve lives everywhere. As a Presidents Club member, your generosity shows the world how critical our work is to the future of our state and our nation.

Thank you again for making the University of Georgia your cause. I look forward to honoring you and your contributions to the University at the next Presidents Club Reception.

Sincerely,
Joe W. McPherson
Joe W. McPherson
President

Administration Building | 100 South Jackson Street | Athens, Georgia 30602-1000
Telephone: 706-542-5179 | Fax: 706-542-5442
For more information, please contact Donor Relations.

The threshold for Presidents Club was raised from \$1,000 to \$1,500 in FY18.

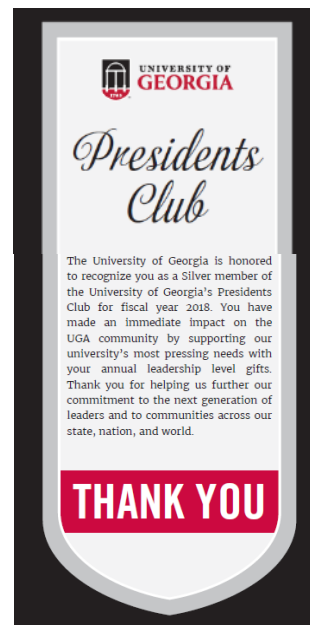
PRESIDENTS CLUB YEAR-END DECAL ACKNOWLEDGEMENT

Presidential Stewardship Coordinator

ANNUALLY IN AUGUST

2018's new Presidents Club threshold was an ideal time to refresh branding for the entire giving society. We reevaluated our past giving levels (Associates, Fellows, and Benefactors) and developed a new program that is easier to understand and identify. Presidents Club members receive the Welcome Packet upon reaching \$1,500, but many of these donors reach a larger giving level over the course of the fiscal year through multiple gifts. To honor this giving, we mail an annual decal in August that reflects the donor's total giving during the previous fiscal year. This mailing also serves as a Save the Date for the Annual Presidents Club Reception held each fall.

Presidents Club Decal stewardship began in FY18.

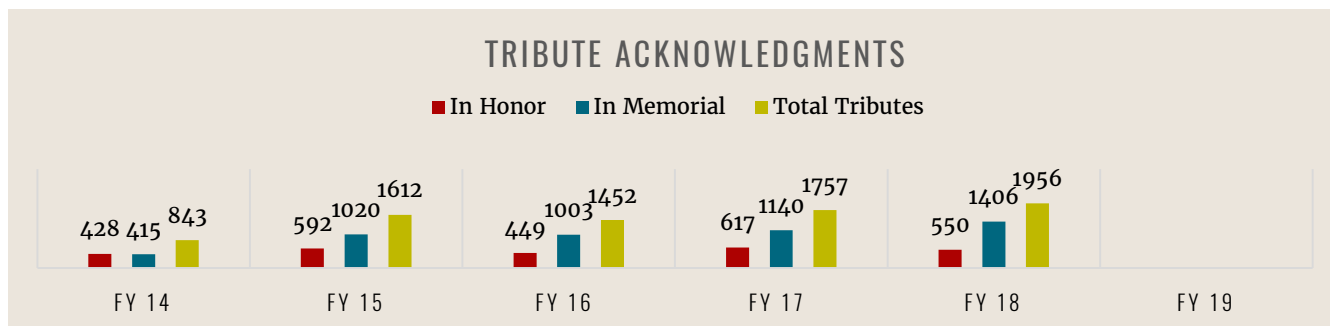


MEMORIAL & HONORARY GIFT NOTIFICATION

Scholarship Stewardship Coordinator

WEEKLY MAILING

All memorial and honorary gifts receive special acknowledgement by the Office of Donor Relations & Stewardship. Special cards or letters (depending on the number of gifts) are generated and the names of donors who contribute to memorial or honorary funds are shared with the family members and friends associated with these accounts so that they may offer additional gift acknowledgements. This important service is especially important as donors are dealing with personal loss and are experiencing emotional times in their lives.



Memorial and Honorary Gift Acknowledgement stewardship has been occurring since 2007. The process was updated, and Donor Relations and Stewardship began recording this information in 2012.

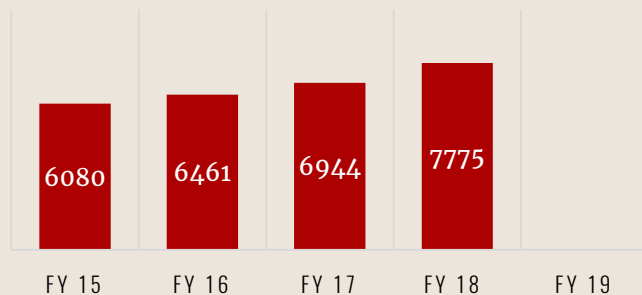
FIRST-TIME GIFT ACKNOWLEDGEMENT

Scholarship Stewardship Coordinator

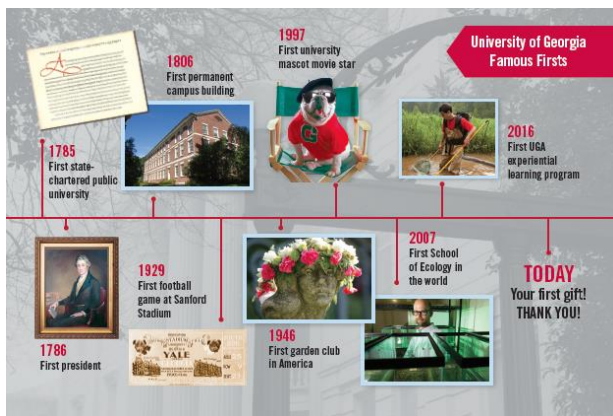
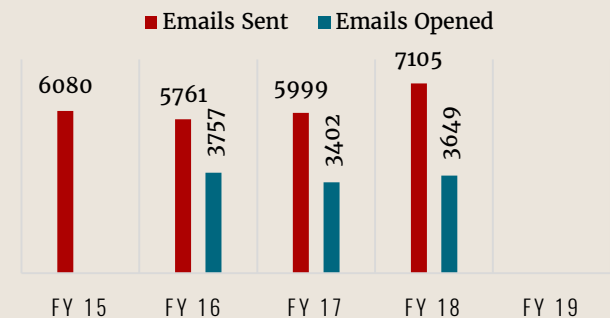
MONTHLY MAILING

First-time donors receive a specialized message through direct mail and e-mail welcoming them to the family of thousands of UGA donors. The e-mail is updated annually with a video message of thankful students at the previous fiscal year's Thank a Donor Day. The direct mail piece celebrates their first-time gift along with other University of Georgia famous firsts.

FIRST-TIME DONOR MAILING



FIRST-TIME DONOR EMAIL



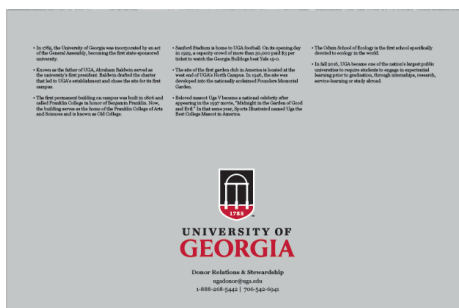
THANK YOU FOR YOUR FIRST GIFT TO THE UNIVERSITY OF GEORGIA!

As the birthplace of public higher education in America, the University of Georgia has celebrated a lot of firsts. Your first gift will lead to many more firsts—from our students' first steps toward achieving their dreams to our committed researchers' first steps toward solving the world's biggest problems.

In appreciation for your generosity, we welcome you to the UGA family of supporters and hope to make history together for years to come.

Sincerely,

Kelly Kerner
Vice President for Development and Alumni Relations



Thank you for your first gift to the University of Georgia!

As the birthplace of public higher education in America, the University of Georgia has celebrated a lot of firsts. Your first gift will lead to many more firsts for our students as they pursue their passions and discover how they can make a difference.

We hope you enjoy [this message of gratitude](#) from our students and Student Government Association President Cameron Keen. Again, thank you for joining the UGA family of supporters!

[PLAY THE VIDEO](#)

Video created by Ray Boland, Class of 2018.

The University of Georgia Foundation is registered to solicit in every state and provides state-specific registration information at <http://www.ugafoundation.org/charity>.

[communication preferences](#) | [privacy policy](#) | [view in browser](#)

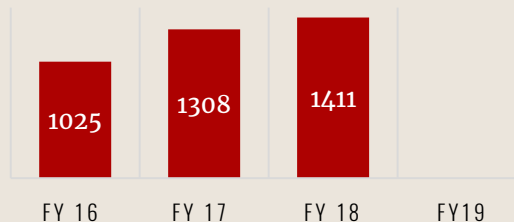
SECOND-TIME GIFT ACKNOWLEDGEMENT

Scholarship Stewardship Coordinator

Second-time donors receive a specialized message through direct mail recognizing their second consecutive year of giving to UGA. The direct mail piece introduces them to the idea of being a loyal UGA donor with a fun “double dawg” message.

MONTHLY MAILING

SECOND-TIME DONOR MAILING



Second-Time Gift stewardship efforts began in 2015.



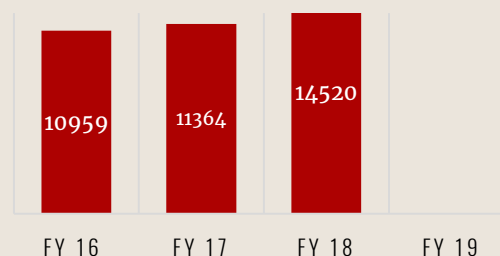
THIRD PILLAR LOYALTY DONOR ACKNOWLEDGEMENT

Scholarship Stewardship Coordinator

The Third Pillar is a loyalty recognition program for donors making gifts in the last three or more consecutive years (see Recognition on page 16). Each Third Pillar donor receives a mailing upon their first gift of the fiscal year that expresses the importance of consecutive giving and includes a Third Pillar magnet.

MONTHLY MAILING

THIRD PILLAR MAILING

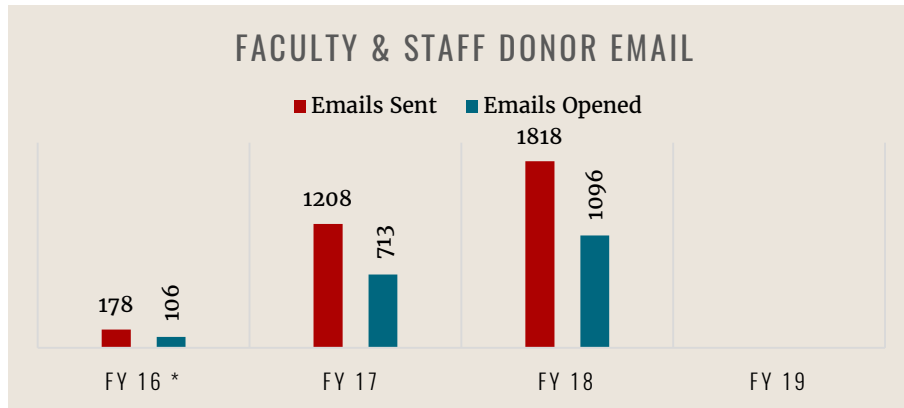


Donor Relations and Stewardship assumed responsibility for Third Pillar in 2014.

FACULTY & STAFF DONOR ACKNOWLEDGEMENT

Assistant Director of Donor Relations and Stewardship

Faculty and staff donors will receive an additional e-mail thanking them for their first donation each fiscal year. The e-mail includes a special video message from the Student Government Association President thanking them and explaining the impact faculty and staff giving.



*A query error occurred in FY 16—donors who received the Faculty and Staff thank you before were excluded, so only first-time donors received the message.

Faculty and Staff Donor stewardship efforts began in 2014.

WEEKLY EMAIL



You've gone above and beyond. You have joined thousands of other generous faculty and staff, both current and retired, who go above and beyond by donating to our University. Your gifts are a significant endorsement of the *Commit to Georgia* campaign and our commitment to removing obstacles and opening doors for students, enriching the learning environment, and solving grand challenges for our state and world.

On behalf of the students you impact every day, please enjoy [this message of gratitude](#) from Student Government Association President Cameron Keen.

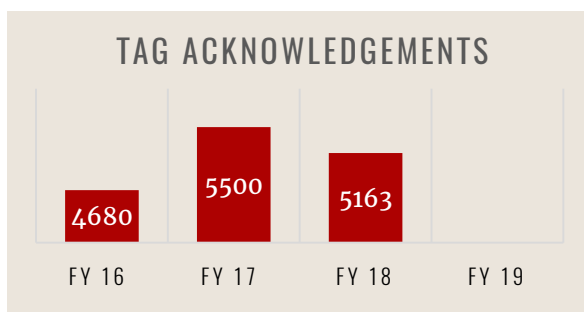
[PLAY THE VIDEO](#)

The University of Georgia Foundation is registered to solicit in every state and provides state specific registration information at <http://www.ugafoundation.org/charity>.
communication preferences | privacy policy | view in browser

GEORGIA VEHICLE TAG ACKNOWLEDGEMENT

Scholarship Stewardship Coordinator

State of Georgia special tag holders who chose to share their information with us receive a postcard thanking them for supporting scholarships at UGA. With a new image of Hairy Dog in a unique vehicle each year, Donor Relations and Stewardship hopes to acknowledge this gift that many donors do not realize they are making.



MONTHLY MAILING

Dear UGA supporter,

Thank you for supporting the Bulldog Nation in more ways than one by purchasing a University of Georgia license plate! By buying or renewing your car tag, you are helping hardworking students afford a UGA education.

For each UGA license plate sold or renewed, \$10 is sent to the University of Georgia Foundation. Those funds are designated for the sole purpose of supporting student scholarships.

UGA stands out as one of the nation's most cost-effective choices in higher education. Yet, even with competitive tuition rates, many students still face financial obstacles that can prevent them from reaching their goals.

Thank you for showing your Bulldog Pride while also making a difference in our students' lives!



Tag Acknowledgement stewardship efforts began in 2016.

REPORTING

Reporting on the financial status of endowed funds and impact of leadership giving is essential in order to ensure each donor that his or her gift has been invested wisely and its full value is being distributed appropriately to the University community. Donor Relations and Stewardship has been managing the annual release of Endowment Reports since its inception in 2005 and takes pride in the highly individualized accuracy of these reports. We are excited to continue our new endeavors that illustrates the impact of gifts beyond endowment performance.

FINANCIAL ENDOWMENT REPORTING

Assistant Director of Donor Relations and Stewardship

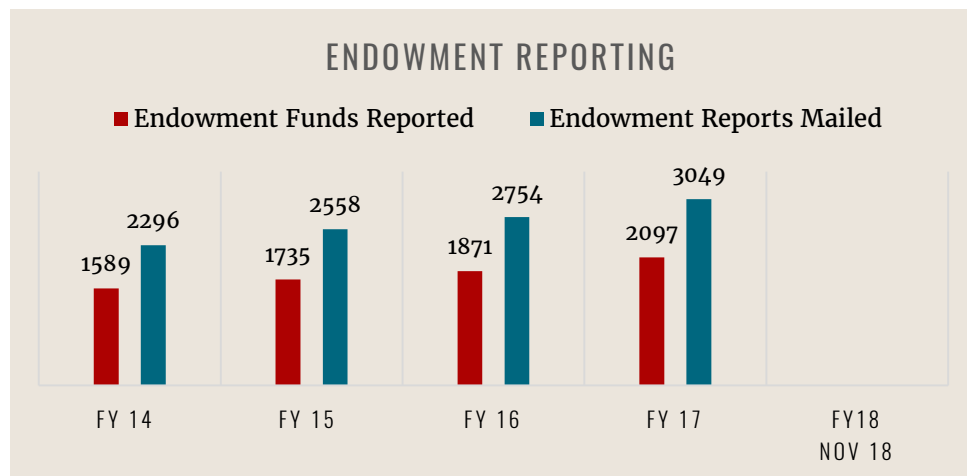
ANNUALLY IN NOVEMBER

Each November, Donor Relations and Stewardship generates Endowment Reports for all endowed funds. These reports reflect the previous fiscal year's status and endowment growth of each fund and are distributed to the donors and donor representatives. Donor Relations and Stewardship works closely with Financial Services to ensure accurate and timely reporting. New stewardship contacts are set up throughout the year as new funds are established. Donor Relations works closely with each school, college, and unit on campus for personalized messages, including departmental-specific photos and text for each report. For endowed scholarship funds, scholarship recipient names are included as part of these reports.

"I shed a few tears and felt huge pride swell in my heart when I got my report. The customized approach, and maybe they do it at other schools but certainly not as well as UGA, is a beautiful way to say thank you.

Makes a huge University seem like a very small family."

CT – NAPLES, FL



Annual Endowment Report stewardship began in 2005. The process was updated, and Donor Relations and Stewardship began recording this information in 2012.

Endowment Reports reflecting FY18 will be mailed November 2018.

390 new scholarships created from FY13 to FY17 • 56 new endowed positions created from FY13 to FY17

**WE COMMIT TO OUR FUTURE.
WE COMMIT TO EACH OTHER.**

By supporting the University of Georgia, you have invested in students, faculty and staff who are committed to making the world a better place. Started in fiscal year 2011, the Commit to Georgia Campaign will change the lives of thousands of students, inspire tomorrow's leaders and fund critical research. These are some of the many ways this campaign has already impacted our university and the communities we serve.

5,390 scholarships awarded in FY17 • \$1.6 million raised to support experiential learning opportunities in FY17

FOR MORE INFORMATION
If you have questions or comments about this report, please contact: Teresa Keadle, Assistant Director, Donor Relations & Stewardship,
University of Georgia, Athens, GA 30602 • Phone: 706-542-6552 • Fax: 706-545-8117 • Email: tkeadle@uga.edu

To view an interactive endowment report example,
please visit our website: donorrelations.uga.edu/sharing
1234560

**THE UNIVERSITY OF GEORGIA
FOUNDATION**

The University of Georgia Scholarship Fund

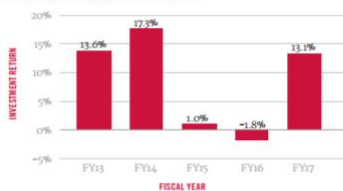
2017 ENDOWMENT REPORT

The University of Georgia Scholarship Fund

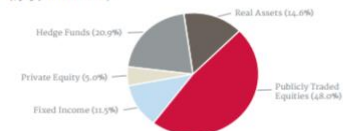
FINANCIAL SUMMARY July 1, 2016 – June 30, 2017	
	Annual Summary
Beginning Balance	\$250,685.05
Gifts	\$10,000.00
Other Revenue	\$0.00
Investment Return	\$30,463.28
Disbursements	(\$6,760.00)
Administrative Fees	(\$2,836.56)
Other Activity	\$5,125.00
Ending Balance	\$286,376.77

If you would like to make additional contributions to this endowment, please contact the University of Georgia at 706-542-6452.

LONG-TERM INVESTMENT RETURNS



PORTFOLIO ALLOCATION - As of June 30, 2017 (\$963.7 million total)



THE UNIVERSITY OF GEORGIA

Chartered by the state of Georgia in 1785, UGA is the birthplace of public higher education in America. What began as a commitment to inspire the next generation grows stronger today through global research, hands-on experiential learning and extensive outreach. One of America's "Public Ivies," UGA tackles some of the world's grand challenges—from combating infectious disease and securing the world's food supply to advancing economic growth and analyzing the environment.

Thank you for helping UGA continue to lead in public higher education. Together, you and our students, faculty and staff make a difference in lives, both near and far. We are forever grateful for your generosity.

Endowment Growth

The University of Georgia Foundation provided more than \$70 million to support UGA's mission this fiscal year, which is more than any other year in our history. Scholarships helped more students afford tuition and pursue meaningful careers, and more leading scholars have joined our campuses. Our researchers also have more resources to tackle the world's biggest issues.

The endowment reached an all-time high and is making an immediate impact. This record-breaking year of support was made possible by a 13.1 percent return on the long-term investment portfolio.

Allocations to international and emerging market public equities, which underachieved last fiscal year, rebounded with strong returns this year. This performance validates that maintaining a diversified portfolio continues to be the most beneficial, long-term investment policy for the Foundation.

Every year, the Foundation's goal is to maximize the return on investment to fund the specific areas that matter most to you. Thank you for continuing to trust us with your support and investing in our great university's future.

Scholarship Recipient(s)

Samuel Student

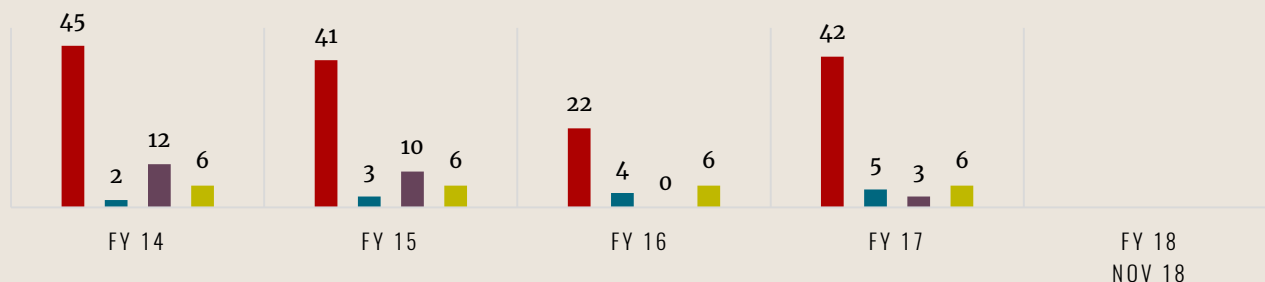


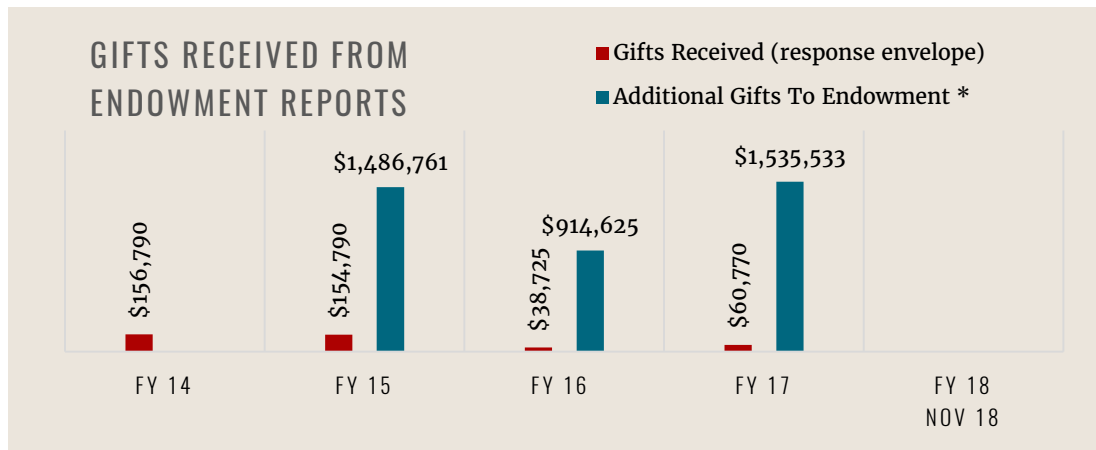
ENDOWMENT REPORT RESPONSE FROM DONORS

The first endowment reports were sent in 2005 to 374 individuals and corporations. This well received project has grown dramatically in size since then due to newly created funds being stewarded as well as established funds being researched for recipients of the information. Included in the Endowment Reports is a return envelope for the donors to update information, request additional reports or fund representations, and provide us with any additional comments. The envelope has also been used to make additional gifts.

RESPONSE FROM DONORS ON ENDOWMENT REPORTS

- Total Responses Received
- Address Updates
- Additional Recipient Requests
- Miscellaneous Comments and Updates





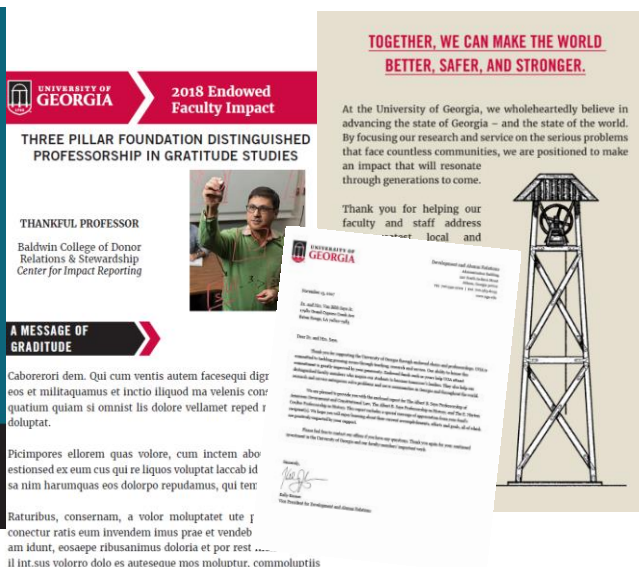
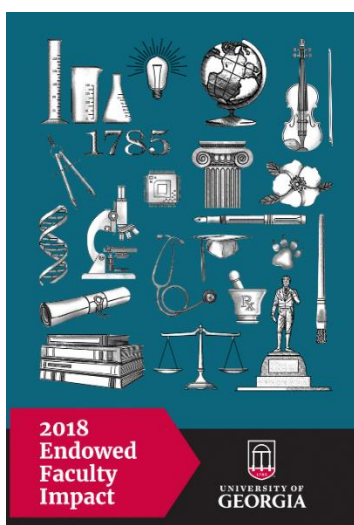
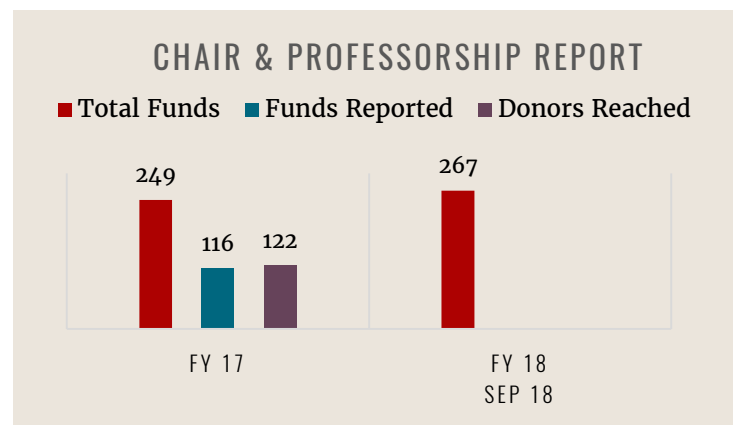
*The process of recording gifts received back from endowment reports was changed beginning FY15. For future years, “Gifts Received” identifies checks mailed in response to the Endowment Report, and “Additional Gifts to Endowment” identifies all gifts given to stewarded endowed funds.

ENDOWED FACULTY IMPACT REPORTING

Donor Impact Coordinator

It was a long-standing goal for Donor Relations and Stewardship to implement an Endowed Faculty Annual Impact Report. Fiscal Year 2017 marked the initial year that these reports were collected, with a release date of November 2017. We learned a lot from our first-year process. With Deans and Directors on board, we reached out to Chairs and Professors via an online Questionnaire that prompted questions about research, teaching, and accomplishments at the University.

ANNUALLY IN THE FALL



The first Endowed Faculty Reports were mailed in FY18, reflecting FY17.

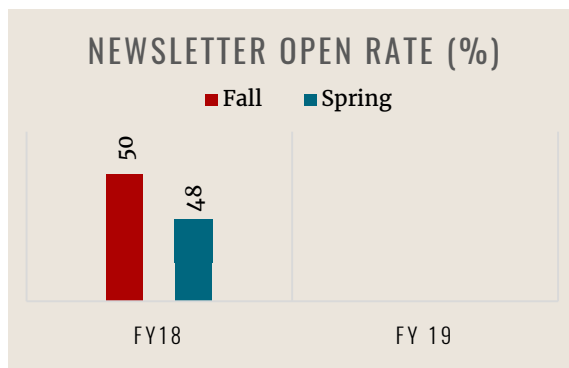
Endowed Faculty Reports reflecting FY18 will be mailed September 2018.

PRESIDENTS CLUB IMPACT NEWSLETTER

Donor Impact Coordinator

BIANNUALLY IN SPRING/FALL

To strengthen stewardship for our recently increased threshold of Presidents Club, we implemented an electronic Biannual Impact Report. This report highlights the ways that leadership annual giving has influenced the University's recent successes. Each fall, the impact report will be sent to all qualifying Presidents Club members of the previous fiscal year and to new members who have reached the \$1,500 giving threshold since July 1st. Each spring, the impact report will be sent to all current members of the Presidents Club.



The first Presidents Club Impact Newsletter was emailed in FY18.

INDIVIDUAL DONOR IMPACT

Donor Impact Coordinator

AS NEEDED

Our top donors often sustain various departments campus-wide, so much of their stewardship occurs based on this departmentalized giving. To illustrate the powerful, cumulative impact these families have had at the University, Individual Donor Impact Reports are our new initiative to honor the total effect of these gifts on the lives of our students, faculty, staff, and entire state.

The first Individual Impact Report was delivered during the Woodruff Scholarship Thirtieth Anniversary Celebration in April 2018. In collaboration with the Assistant Director of Scholarship Stewardship, the book included thank you notes from over 25 alumni recipients of the scholarship, three past Presidents of the University, and staff who formed relationships with the donor over 30-years. It was delivered as a surprise during the Annual Woodruff Scholars Reception (see Scholarships on page 25).



Donor receiving her Individual Impact book at a special reception in Spring of 2018

RECOGNITION

Donor recognition reminds donors how much we appreciate the relationship they share with our University. Timely, personal messaging and upgraded communications that align with gift amounts allow us to steward our donors' generosity with an integrated plan. This way, donors are recognized appropriately and fairly. Donor Relations and Stewardship recognizes University-wide giving through an annual Honor Roll of Donors and various Giving Societies.

HONOR ROLL OF DONORS

Presidential Stewardship Coordinator

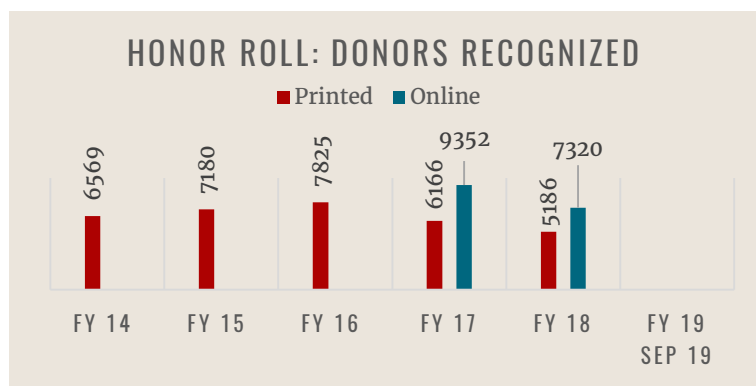
ANNUALLY IN SEPTEMBER

Every UGA donor is an important part of our collective success. Since the inception of Annual Presidents Club, its members have been proudly recognized in the Honor Roll of Donors. To decrease printing costs and more closely align with the goals of our Communications teams, FY17 marked the first year that annual donors of \$5,000+ were recognized in the printed Honor Roll as a part of the updated *President's Annual Report* (see Reporting on page 11), along with Heritage Society, Founding Presidents Club, and Cumulative Giving Societies (see Recognition on page 16). All Presidents Club members (donors of \$1,500+) are recognized via the online Honor Roll viewed through the Office of the President's website. All donors giving at the previously mentioned levels are recognized for their University-wide giving, unless anonymity is requested.

Donor Relations and Stewardship makes monthly data pulls to verify Gift Accounting's input, update biographical information that may have changed, and make corrections as necessary. Through these monthly pulls, updates can be made in smaller sections, easing the time crunch at the end of the fiscal year.

Donors are also recognized in other publications across campus (including but not limited to specialized campaign or development newsletters and magazines, alumni-centered periodicals, and departmental honor rolls).

Donor Relations and Stewardship began recording this information in 2012.



The Crystal Arch Society

The Crystal Arch Society, recognizing gifts of \$10 million and above, is named for the University of Georgia's most recognizable symbol and the main entrance to campus, the Arch. Erected in the 1850s, the Arch is UGA's most revered landmark, patterned after the Great Seal of the State of Georgia.

Anonymous (3)
Callaway Foundation, Inc.
The Coca-Cola Company & The Coca-Cola Foundation
The Bill and Melinda Gates Foundation
Georgia Power Company and Foundation
The Goizueta Foundation
*W. K. Kellogg Foundation

The Abraham Baldwin Society

The Abraham Baldwin Society, recognizing gifts of \$5 million and above, is named for the legendary Georgia statesman, educator, and founder of the University of Georgia. Abraham Baldwin wrote UGA's charter, the first ever written and adopted for a state-supported public university.

Anonymous (2)
American Cancer Society
Mr. Daniel Paul Amos
Mr. and Mrs. Craig Barrow III
*Mrs. Carolyn W. Bryan
Phillip and Betty Casey
Mr. and Mrs. Alston D. Correll Jr.

The 1785 Society

The 1785 Society, recognizing cumulative gifts of \$1 million and above, is named for the year that the University of Georgia was chartered by the Georgia General Assembly and pays homage to UGA's impressive history and tradition of achievement as the first state-chartered university in the nation.

Anonymous (12)
*Mr. and Mrs. W. R. Acree
*Dr. Omer Clyde Aderhold and *Mrs. Bess Parr Aderhold
Mr. John G. Alston Sr. and Mrs. Gayle S. Alston
*Ambassador and *Mrs. Phillip H. Alston Jr.
Altria Group, Inc.

The threshold for the FY18 Online Honor Roll of Donors was raised to \$1,500 to align with Presidents Club. The Presidents Annual Report reflecting FY18 will be mailed in the Fall 2018.

GIVING SOCIETIES

In addition to the various recognition societies present within the schools, colleges, and units, the University of Georgia recognizes donors with the following gift societies: Presidents Club, Cumulative Giving Societies, Third Pillar, and Heritage Society. With the exception of the Heritage Society, association information, membership management and related events are coordinated by the Donor Relations and Stewardship.

ANNUAL GIVING SOCIETIES

ANNUAL PRESIDENTS CLUB

Named to honor the past leadership of the University of Georgia, the Presidents Club recognizes donors whose annual gifts total \$1,500 or more. Annual membership is based on the University's fiscal year (July–June) and is renewable. Presidents Club is stewarded through a Welcome Packet when a donor reaches the \$1,500 threshold (see Acknowledgements on page 5) and an annual reception held the following fall (see Events on page 20). Beginning in FY18, donors who give at this newly increased level are also stewarded through a decal program (see Acknowledgements on page 5) that aligns with his/her giving and a Biannual Impact Report each fall and spring (see Reporting on page 11).

PRESIDENTS CLUB TIERED GIVING LEVELS

Effective July 1, 2017



BRONZE
\$1,500–\$4,999

SILVER
\$5,000–\$9,999

GOLD
\$10,000–\$24,999

PLATINUM
\$25,000+

Presidents Club began in 1973. Donor Relations and Stewardship began recording this information in 2013. Please see Presidents Club Welcome Packets on page * for more information.

The threshold for Presidents Club was raised from \$1,000 to \$1,500 in FY18.

FOUNDING PRESIDENTS CLUB

Closed as of 1994

Founding members of the Presidents Club have a special lifetime distinction having joined in the first twenty years of the program. These individuals made a \$10,000 total commitment and/or purchased a \$25,000 life insurance policy naming UGA as the sole beneficiary. They are honored by having their names listed on the Donor Wall in the Presidents Garden located on North Campus behind Old College.



President's Garden

CUMULATIVE GIVING SOCIETIES

In conjunction with the kickoff of the Archway to Excellence Campaign in 2001, the University of Georgia announced three new cumulative giving societies that recognize major donors to the University of Georgia. These giving societies recognize individuals, corporations, foundations and organizations whose cumulative gifts have reached \$1 million and above. Donors are listed on the historic Donor Wall located in the Presidents Garden at Old College on North Campus. Beginning in 2017, individuals who reach one of the following societies or move up to a new Cumulative Giving Society within the *Commit to Georgia* campaign may receive a limited edition print of the Presidents Garden by Katherine Schuber (right).



Limited edition print of the President's Garden by
Katherine Schuber

THE CRYSTAL ARCH SOCIETY

\$ 10 MILLION

The Crystal Arch Society, recognizing gifts of \$10 million and above, is named for the University of Georgia's most recognizable symbol and the main entrance to campus, the Arch. Erected in the 1850s, the Arch is UGA's most revered landmark, patterned after the Great Seal of the State of Georgia.

THE ABRAHAM BALDWIN SOCIETY

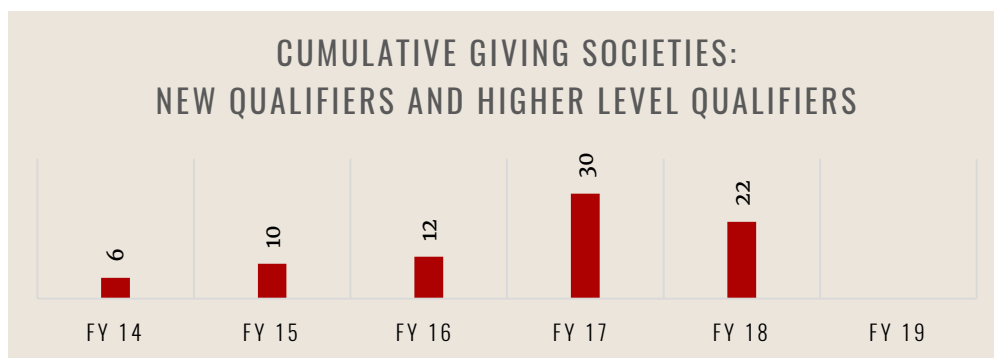
\$ 5 MILLION

The Abraham Baldwin Society, recognizing gifts of \$5 million and above, is named for the legendary Georgia statesman, educator and founder of the University of Georgia. Abraham Baldwin wrote UGA's charter, the first-ever written and adopted for a state-supported public university.

THE 1785 SOCIETY

\$ 1 MILLION

The 1785 Society, recognizing cumulative gifts of \$1 million and above, is named for the year that the University of Georgia was chartered by the Georgia General Assembly, pays homage to our impressive history and tradition of achievement as the first state-chartered university in the nation.



Cumulative Giving Societies stewardship began in 2001.
Donor Relations and Stewardship began recording this information in 2012.

LOYALTY GIVING SOCIETY

THIRD PILLAR

The Third Pillar is a loyalty recognition program for donors making gifts in the last three or more consecutive years. Our analytics show that the third year of consecutive giving is a very important milestone, which most often predicts continued support. We believe it is important to recognize this special achievement of loyal giving to help seal their commitment. Each Third Pillar donor receives a special mailing with a Third Pillar magnet upon their first gift of the fiscal year (see Acknowledgements on page 5).

Donor Relations and Stewardship assumed responsibility for Third Pillar and began recording this information in FY16.

PLANNED GIVING SOCIETY

HERITAGE SOCIETY

Gift and Estate Planning Stewardship Coordinator

The Heritage Society was established by the University of Georgia Foundation Board of Trustees to recognize the generosity of those that have documented a deferred gift to benefit the University of Georgia. Recognition is appropriate, not just to offer thanks to these donors, but to provide historical context to the magnitude of their generosity.

Individuals are automatically welcomed into membership once they have documented a commitment to the University of Georgia Foundation or one of its affiliated organizations. The Heritage Society is currently over 1000 members representing over \$250 million in documented expectancies to benefit the University. Countless scholarships, professorships, and support funds have been created through deferred gifts in addition to providing an ongoing source of unrestricted support. Members of this elite group receive special acknowledgement from the President, are honored annually in university publications, and are periodically invited to exclusive university functions.



Vineyard Vines scarf

Heritage Society stewardship began in 1995 and is managed by Gift and Estate Planning.
Please contact Gift and Estate Planning for questions.

EVENTS

Donor Relations and Stewardship, in conjunction with Special Events, hosts a signature donor recognition event: Presidents Club Reception. Donor Relations and Stewardship also hosts an event celebrating our faculty, staff and retiree donors. We are focused on making these events as donor-centered and meaningful as possible, and continue to create opportunities that make it as easy as possible for UGA's fundraisers to steward and cultivate their donors. We ensure that appropriate people are invited to associated donor events, and that invitation and attending lists and other pertinent information is shared with development staff around campus.

THE PRESIDENTS CLUB RECEPTION

Assistant Director of Presidential Stewardship

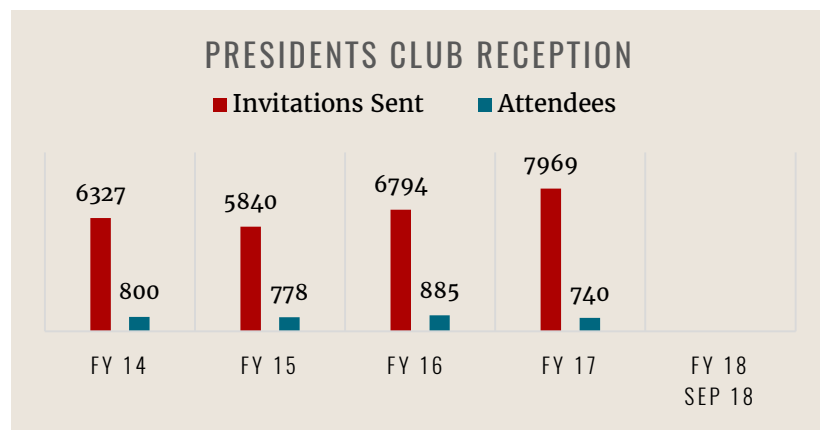
ANNUALLY IN THE FALL

The Presidents Club Reception is an annual event held each fall (on a Friday evening before a home football game). Annual Presidents Club members are recognized for their generous contributions to the University; along with Founding Presidents Club members; Cumulative Giving Societies members), Heritage Society members (see Recognition on page 16); and individual donors who have given \$100,000 in their lifetime. Donor Relations and Stewardship works to select the brightest ambassadors to represent the UGA student body. These students interact with donors and guests during the evening and their synergy adds greatly to the success of the event.

In an effort to recognize donors at the event, donors receive a special ribbon attached to their nametag indicating their giving level and/or giving society status. These ribbons represent Presidents Club giving levels, Cumulative Giving Societies, and Heritage Society members. Donor Relations and Stewardship creates a special PowerPoint presentation that is shown in the background during the event, with a giving message that expresses sincere gratitude to our donors. Included in the presentation are quotes of gratitude from thankful UGA students who are serving as student ambassadors during the event.



Presidents Club Ambassadors



Presidents Club Reception is one of the longest-running stewardship traditions at the University beginning in 1973.

Donor Relations and Stewardship began recording this information in FY13.



The FY17 Reception, taking place in November 2017, was the last reception recognizing Presidents Club members at the previous threshold of \$1,000 and above. The Reception honoring FY18 giving will take place Fall 2018.

FACUTLY, STAFF & RETIREE DONOR APPRECIATION RECEPTION

Assistant Director of Presidential Stewardship

ANNUALLY IN THE FALL



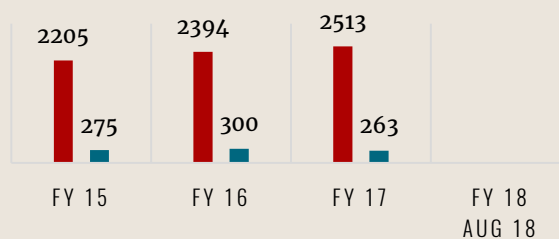
The Faculty and Staff Donor Appreciation Reception recognizes faculty, staff, and retirees at UGA who give a financial gift of any size to the university during the fiscal year. The reception is held each fall and recognizes the previous fiscal year of giving. This event is meant to be a fun party for our UGA family, which includes simple decoration with a changing theme, fun activities, and remarks from the President.

The aim of this event is to help faculty, staff, and retirees feel appreciated for going above and beyond their normal duties by giving to UGA. It is also a way to promote the impact and significance of giving to faculty, staff, and retirees who are lapsed donors or who have never given.

Donor Relations and Stewardship began recording this information in FY13.

FACULTY & STAFF DONOR APPRECIATION RECEPTION

■ Invitations Sent ■ Attendees



2017 RECEPTION



2016 RECEPTION



The Reception honoring FY18 giving will take place August 2018.

SPECIAL COMMUNICATION

Our office strives to retain donors through relationship building. Because of this, appropriate acknowledgement occurs throughout the year—not just immediately following a gift. We utilize special days and holidays as moments to reach donors with inspiring and grateful messages year-round.

VIDEO MESSAGING

Video messages are a great way to let donors hear first-hand about the impact of their gifts. We are able to bring the campus (including sights, sounds, accents, etc.) to them across the country and the world. Videos are a great form of “blanket stewardship” as we are able to touch all donor groups in a meaningful and cost-effective way. Donor Relations and Stewardship uses video messaging as a creative and cost-effective method of donor stewardship. Several videos have been created in-house and sent out to all UGA donors. These have been extremely well-received.

THANK A DONOR DAY VIDEO

The Thank a Donor Day video is e-mailed once as a stand-alone blanket stewardship piece, again to first-time donors (see Acknowledgements on page 5), and in several more communication pieces throughout the division throughout the following fiscal year.

Thank a Donor Day video messaging stewardship began in FY13.



On April 12, the University of Georgia hosted our seventh annual Thank a Donor Day. Students gathered in Tate Plaza to write cards and craft posters expressing their gratitude for donors like you. Each student's UGA experience is unique, but what they all share in common is the impact of your support.

Thank you for making UGA what it is today.

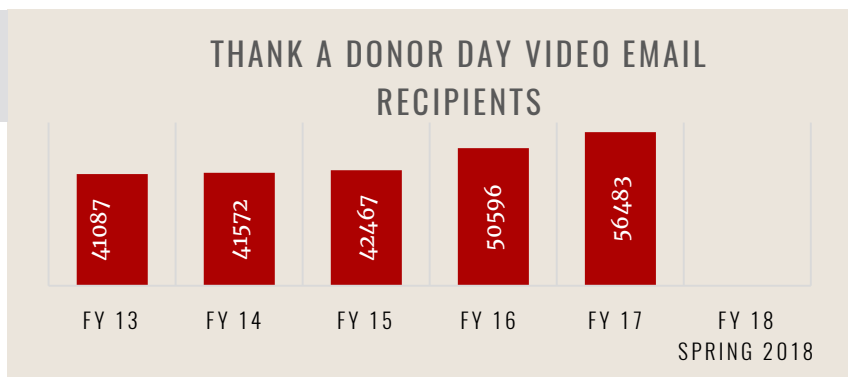
We cannot stress enough how grateful we are for your continued support, so please enjoy this video featuring grateful students from this year's Thank a Donor Day.

PLAY THE VIDEO

Video created by Ray Boland, Class of 2018.

VIEW THE PHOTO GALLERY

VIEW THE #UGATHANKU RECAP



View the 2018 Thank a Donor Day video:

<https://www.youtube.com/watch?v=6i73DtQbK08&feature=youtu.be>



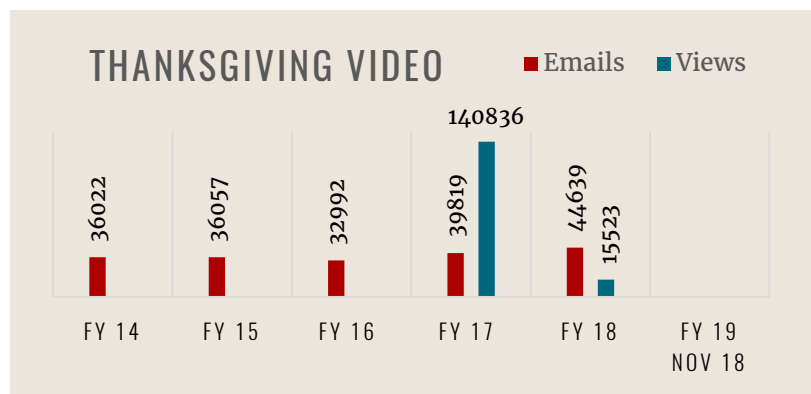
FY18's Thank a Donor Day email had an open rate of 37.6%!

Views continue to rise as the video is used throughout the following fiscal year for First Time Donor stewardship.

THANKSGIVING VIDEO

The Thanksgiving video contains messages of gratitude to our generous donors for their support and sends wishes for a happy Thanksgiving. This video is distributed the week before Thanksgiving. Our 2016 video was well-loved by our Administration and broke all records for views. It was shared across University-wide social media and received over 250,000 impressions on Facebook and Twitter.

FY18's email saw a 10% increase in open rate, up to 37.9% from FY17's 27.6%!



*Views indicate those from email, Facebook, Twitter & YouTube.



HAPPY THANKSGIVING

As the leaves change and the weather cools, we are reminded of how many long-lasting memories have been made here at the University of Georgia. Your passionate support allows our students to build these same life-changing memories.

Thank you to our UGA family of donors and warmest wishes for a Happy Thanksgiving.

PLAY THE VIDEO

View the 2017 Thanksgiving video:

<https://www.youtube.com/watch?v=noGCyql7Qbc>

View the 2016 Thanksgiving video:

vimeo.com/192575199

Thanksgiving messaging stewardship began in FY13.

THANK A DONOR DAY

“I wanted to take a minute and thank you for sending this – sure, I realize it’s a broadcast e-mail to all the alums, but I have to say it’s the first piece I’ve seen in a while that really made me excited and made me reach for my wallet. A really nicely done job to all of you who put it together and what SMART way to involve the whole campus in creating and culture of philanthropy. As an alum (BA in Drama, ’92) and now a fundraising consultant, I’m really impressed. All the best and again, thanks for doing this.”

TCB – LAS VEGAS, NEVADA

“Wow. You guys hit a home run with this idea. It honestly more than teared me up. Like one of the mini-testimonials in the video, I was also the first in my family to ever go to college – and I was able to earn (my first) degree from UGA! I just cannot tell you how this video got straight to my heart. Thank you and Go Dawgs!”

DKM – FALLS CHURCH, VIRGINIA

THANKSGIVING

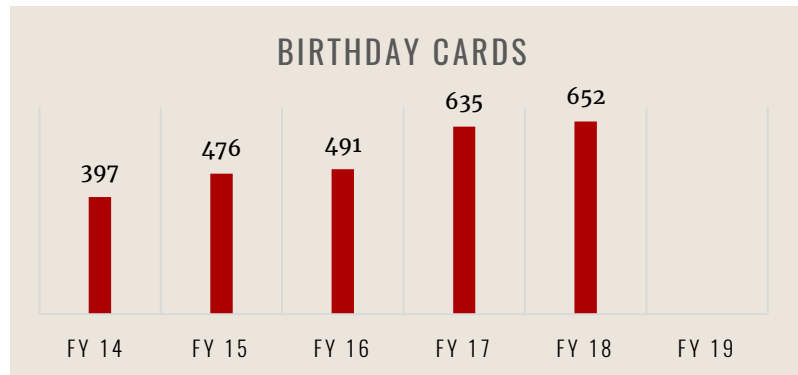
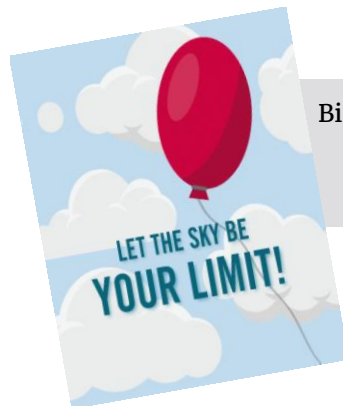
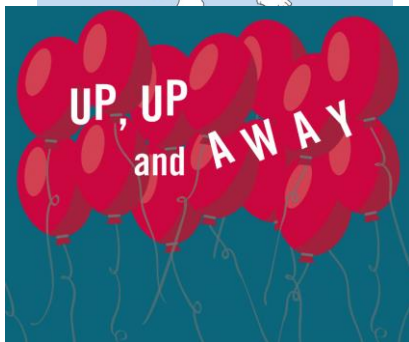
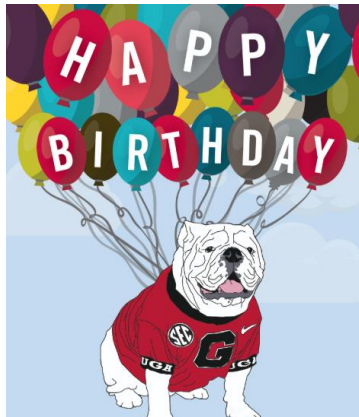
“This one actually choked me up. Great job, well done!”

NJQ – ATLANTA, GEORGIA

BIRTHDAY CARDS

Administrative Assistant

Birthday cards are sent to key donors, including: donors of \$500,000, Trustees, and top Campaign prospects. We also send cards to fundraisers and other key staff as a thank you, perhaps inspiring them to initiate similar personal touches for their donors. As with most of our acknowledgements and communications, we take much pride in designing a new birthday card each year to bring a little bit of surprise and energy to the mailing.



Birthday Card stewardship began in FY11. Donor Relations and Stewardship began recording this information in FY12.

PAST BIRTHDAY CARDS

It is essential that our birthday card design changes each year. Our donors look forward to receiving a card that is creative and different from other branded, development materials. Past designs include:



SCHOLARSHIPS

Stewarding gifts made to scholarship funds reinforces the University of Georgia's efforts to assure a donor that his or her investment is meaningful, appreciated, and being used as promised. Stewarding scholarships is a year-long process, running from the announcement of scholarships in early June through Graduation the following May. Donor Relations and Stewardship fulfills this important stewardship obligation by providing scholarship donors with recipient information and financial updates.

UNIVERSITY-WIDE SCHOLARSHIPS

Assistant Director of Scholarship Stewardship

In addition to an Annual Endowment Report that illustrates the previous year's financial performance of the fund (see Reporting on page 11), scholarship stewardship is accomplished through acknowledgement, notification of recipient, and impact.

NOTIFICATION OF RECIPIENT LETTER

Beginning in October of 2017, the Assistant Director of Scholarship Support began mailing a formal letter to donor representatives announcing the names of recipients who are receiving their scholarship for the 2017–2018 academic year. This letter includes a photo and handwritten note from students who attend PAWS to Say Thank You!, and donors are asked if they would like to meet their student(s) during the academic year. This is an exciting addition to our scholarship stewardship plan, as it will be the quickest way to let donors know that their fund has been awarded.

Recipient Notification Letter stewardship was a new initiative for FY18.

GRATITUDE REPORTS


All UGA non-departmental—endowed and non-endowed scholarship funds—and their donors or donor representatives have been identified. These University-wide scholarships include those awarded through Admissions (such as Charter Scholarships) and the Office of Student Financial Aid (such as Access Scholarships), as well as all Georgia Commitment Scholarships and some awarded through the Office of Instruction. Since these scholarships are not awarded by a unit, no Development Officer is assigned to the donors for stewardship. Therefore, Donor Relations and Stewardship stewards these funds centrally.



Scholarship recipients of these University-wide funds are contacted each summer upon the announcement of their award to request personal scholarship questionnaires and photos. Students

who receive a scholarship awarded by Admissions receive a t-shirt at ThankU! Orientation after completing an online thank-you questionnaire (see ThankU on page 32). Students who receive a scholarship through Financial Aid are asked to complete a similar questionnaire and to pick up a t-shirt on campus at a later date. (see ThankU on page 32).

This information is compiled into a standard format and sent to scholarship donors in their Gratitude Report in February. Gratitude Reports are colorfully designed, thoughtful and appealing packets that illustrate the importance of scholarships to the University. They are highly individualized and include thank you messages from the very students benefitting from the donors' generosity. They reinforce our appreciation separate from endowment reports and encourage continued and increased giving to these funds. A Gratitude Report is created for every endowed scholarship that we steward centrally, which includes all scholarships awarded through Financial Aid and Admissions. In the past, donors received their scholarship recipient information and thank you notes at the end of the fiscal year. Due to this initiative, donors now receive personalized recipient information while the students are receiving the donor's support. Donors are now receiving a stewardship touch three-times throughout the year, including their fall Recipient Notification, spring Gratitude Report, and following fall Endowment Report information.



UNIVERSITY OF GEORGIA


Gratitude Report

AT THE HEART OF ALL WE DO IS HEART.

At the University of Georgia, we share a deep love for our students. We aim to give them every opportunity as they prepare to take on the biggest challenges facing our state and our world. Our students will go on to develop revolutionary products and businesses, build upon years of agricultural research, or stop the spread of disease before they become epidemics. Scholarships remove the obstacles that stand in their way and unlock paths that are otherwise inaccessible. Thank you for helping talented students achieve their dreams. The impact of your scholarship support truly knows no bounds.

“ Your generous support of the University of Georgia will help us convert possibility into reality. From new student scholarships and enhanced learning experiences to improved academic facilities and increased research capacity, your commitment will change lives across our state and around the world. ”

President Jere W. Morehead



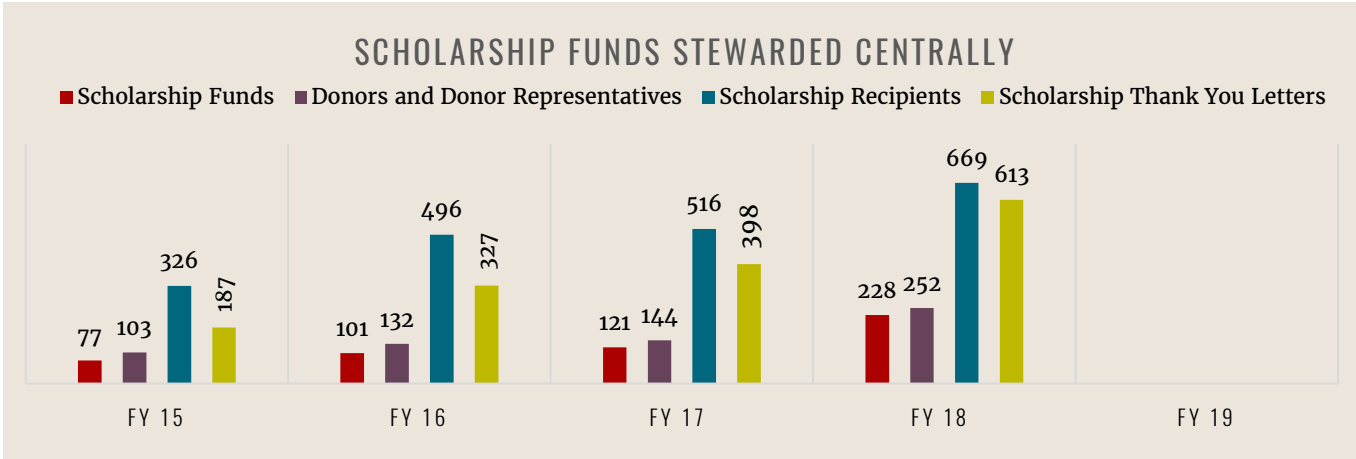
MICHAEL KAHN INCENTIVE SCHOLARSHIP



Aracely Vanessa Caldera
Calhoun, Georgia
Freshman
International Business, Economics

“What would you say as a thank you message to the UGA donors who financially support your scholarship?”

I would like to say that I am so unbelievably blessed to have been a recipient of such a wonderful scholarship. I never once thought I'd find myself getting ready to go to one of the best colleges in the world. Growing up, my family's financial status was never the best, but knowing that I will be able to go to college and that my dreams come true to me. I am so happy that my efforts were seen by others and to push me to continue to strive above and beyond. Having scholarship money having people know their time and money into you and I believe that it's important to not let them down. Thank you for helping me get around and being the value of my education.



Gratitude Report Stewardship began in FY14.

THANKU! SCHOLARSHIP RECIPIENT GRATITUDE

To encourage participation in the Gratitude Report questionnaire, Donor Relations and Stewardship has two programs for Admissions and Financial Aid scholarship recipients. For more information, please see our chapter on Student Gratitude (see ThankU on page 32).

NOTE: All other scholarships (departmental) are stewarded in similar fashion; however, it is the responsibility of each benefitting school, college, or unit to coordinate procedures for their scholarship funds. Donor Relations and Stewardship conducted a Scholarship Stewardship Survey to identify areas of need in this stewardship across campus in 2017 (see Team Stewardship on page 35).

THANK VIEW VIDEO MESSAGES

Assistant Director of Scholarship Stewardship

In FY18, we tested a new product in the stewardship profession. Thank View is an easy-to-use platform that collects short video messages and delivers the message via email to the fund's beneficiary. In our first year of testing this product, we were able to deliver 60 video messages to our scholarship donors!

In FY19, we are rolling this product out with a more systematic plan to all Admissions and OSFA awarded scholarships, as well as to our units! Personalized video messaging is the future of stewardship, and we are looking forward to forging this path with our scholarship donors. We will begin tracking our progress as our plan is more strategically developed.

Thank View messaging began in FY18.

ENHANCED STEWARDSHIP FOR SELECT DONORS & PROGRAMS

Assistant Director of Scholarship Stewardship

With increased support for the stewardship of these funds, we hope to strengthen individualized stewardship for scholarship endowments by facilitating more recipient-donor events with the help of donors' development officers. We currently provide this type of stewardship in the following ways:

ANNUAL GEORGE W. WOODRUFF SCHOLARSHIP LUNCHEON

Donor Relations and Stewardship hosts the George W. Woodruff Scholarship Luncheon each spring. The luncheon includes Missie Pierce, granddaughter of George Woodruff, her husband Bill, and the current Woodruff Scholarship recipients.

FY18 marked the 30th anniversary for the Woodruff Scholarship. See more about this impactful event in Reporting (on page 11).



GEORGIA COMMITMENT SCHOLARSHIP PROGRAM STEWARDSHIP

We are excited to take part in stewarding Georgia Commitment Scholarships. Our development of this stewardship plan includes an annual email thanking all donors who have created a Georgia Commitment Scholarship Fund and a letter from our Vice President for Development and Alumni Relations as a fund is established. Georgia Commitment Scholars are also invited to participate in PAWS to Say Thank You! (see Student Gratitude on page 32), which encourages the student to write a hand-written note and create a Thank View video message.

OTHER INDIVIDUALIZED STEWARDSHIP AS-NEEDED

We continue to make efforts to focus on individualized stewardship plans for top scholarship donors. As part of these efforts, we plan the following as needed:

- Face-to-face stewardship visits with select scholarship donors
- Video interviews of scholarship recipients
- Individual scholarship luncheons

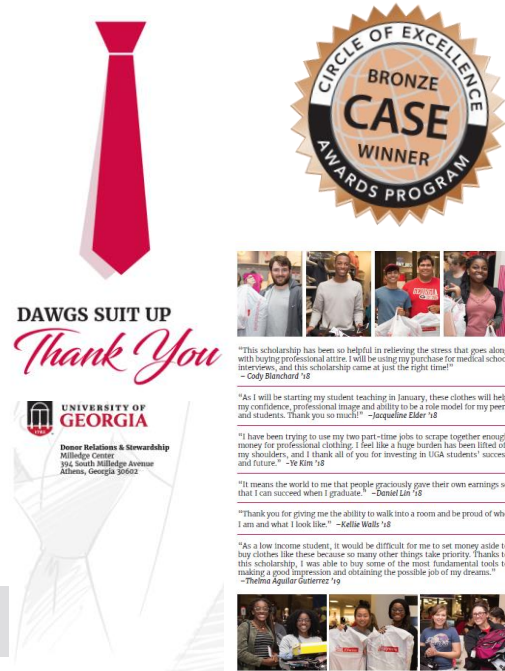
The Assistant Director of Scholarship Stewardship was hired in 2014, increasing systematic enhanced stewardship.

CAREER CENTER COLLABORATION: DAWGS SUIT UP!

Career Center

In 2017, Career Center created Dawgs Suit Up!, a deeply discounted professional attire event hosted by JC Penney. Students were invited to our local JC Penney store on a special day—a few weeks before the Fall Career Fair—to purchase professional clothing as they enter the intern and career market. Thanks to our Board of Trustees, a scholarship program was quickly funded. We thanked these donors through an email message following the event and a follow-up mailing of thank you messages from students that was signed by Career Center staff (shown below). Dawgs Suit Up! was such a success that our Foundation allocated funds to support the scholarship again in FY19. We look forward to collaborating with Career Center on an annual basis to thank donors of this special program.

Dawgs Suit Up! began in FY18.



ALUMNI ASSOCIATION COLLABORATION: 1961 CLUB

Alumni Association

The 1961 Club was created in mid-FY18 by the Alumni Association to engage alumni and support the Black Alumni Scholarship Fund. We consulted with Alumni Association as they created their stewardship plan for this group of donors, and we look forward to their rollout in FY19.

PRESIDENTIAL STEWARDSHIP

The addition of Presidential Stewardship to Donor Relations and Stewardship in 2016 has been monumental in keeping our team connected to Regional and Principal Giving, the President's Office, Corporate and Foundation Relations, and Special Events. Giving stewardship a seat at the table when planning for major gifts and events ensures that donors have a holistic giving experience, and our President is able to better utilize his time with donors and acknowledge their generosity personally and effectively.

LEADERSHIP STEWARDSHIP STRATEGY

Assistant Director of Presidential Stewardship

The Assistant Director of Presidential Stewardship is a part of two meetings that discuss plans for stewarding the University's top-tier donors.

COMPREHENSIVE CAMPAIGN MEETING

This meeting occurs for Development Administration to inform the President's Office on fiscal year fundraising updates, upcoming visits with top donors, and any necessary prospect updates. The Assistant Director does not attend these meetings, but prepares a memo that covers the agenda.

PRINCIPAL GIFTS PROGRESS MEETING

The Principal Gifts meeting places Principal Gifts, Corporate and Foundation Relations, Research, Prospect Management, and other key fundraisers in the same room to discuss Prospect Plans and calendars. Principal Gifts runs this meeting and reviews active plans on the University's top campaign prospects. The Assistant Director takes notes to better understand specific top-donor relationships and fundraising goals. After this, she shares the Stewardship Strategy Report, which lists upcoming Presidential visits, donor birthdays, donors who are nearing a Cumulative Giving Society, Cumulative Giving Society recognition status, and the status of any outstanding Individual Impact Reports. This important part of the meeting allows Donor Relations and Stewardship's programs to be intentionally implemented.



Administration Building

All Presidential Stewardship was initiated in 2016.

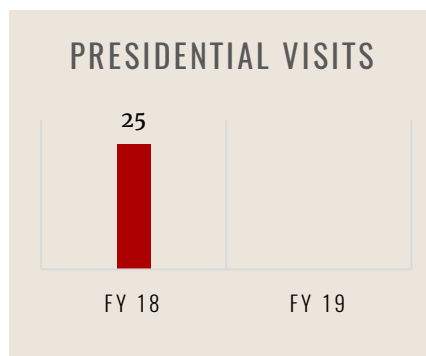
PRESIDENTIAL DONOR VISIT PLANNING

Assistant Director of Presidential Stewardship

Presidential Stewardship's biggest responsibility is coordinating the stewardship experience surrounding a Development visit with the President. The Assistant Director plays a part in developing the initial proposal explaining the need for a Presidential visit, coordinating the President's schedule, creating the briefing for the President prior to the visit, and drafting a meaningful acknowledgement letter with the Prospect Manager to follow up with the donor. The ability for Donor Relations and Stewardship to house this process—including Presidential letters acknowledging gifts—allows our stewardship to fit the needs of the donor and his/her relationship to the University.

SCHEDULING THE VISIT

The process of planning a Presidential donor visit involves much coordination between Development Officers, the President's Office, and Donor Relations and Stewardship. The Assistant Director serves as a liaison between Development and the President by collecting a list of donors to propose to the President, along with an initial purpose from each Development Officer to support that proposal. Once the President's Office approves a visit, scheduling begins. It can take several weeks to match a date between the President's busy schedule and the schedule of our highest level of donors. As the date is set, the Assistant Director begins the briefing process.



CREATING THE BRIEFING

Presidential visit briefings are in-depth and require information from the Development Officer and Research, as well as all event logistics (driving/walking directions, parking instructions, attire, and special etiquette). The Assistant Director is careful in formatting these briefings in a consistent way, keeping the purpose of the visit central to the booklet. After the Development Officer's approval, the Assistant Director sends the final briefing to the President two-days before the visit.

ACKNOWLEDGING THE VISIT

The Assistant Director begins coordinating the follow-up letter by the President upon the visit. She checks-in with the Development Officer the morning of the visit to get a few general statements about the purpose before creating a template. After the meeting, the Assistant Director speaks with the Development Officer again to learn the tone and topics of the visit. A drafted letter is sent to the President's Office the following day to be edited, signed, and mailed.



President's Home

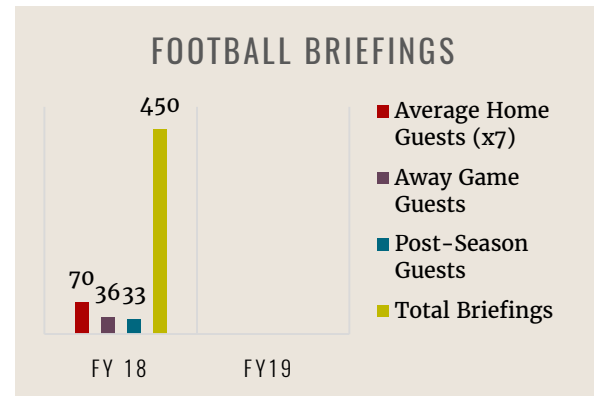
FY18 marked the first year for recording Presidential Donor Visit Planning data.

PRESIDENTIAL EVENT BRIEFINGS

Assistant Director of Presidential Stewardship

FOOTBALL SKYSUITE

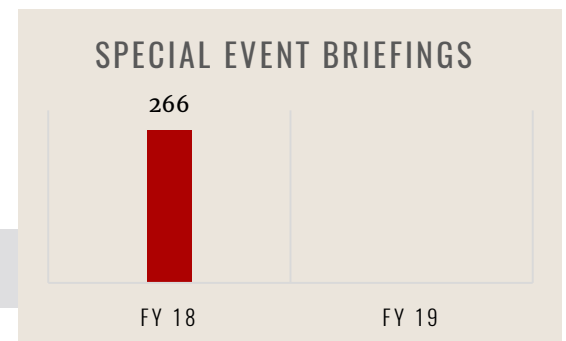
Football game days are a timeless way to interact with our donors among the excitement of college athletics. The Assistant Director begins working with the Vice President's Chief of Staff to coordinate SkySuite invitation lists in July to ensure all seats in the President's and Office of Development's Sky Suites are filled. With the help of External Support, short briefing templates have been created to make this hectic, weekly process during the Fall run seamlessly. Briefings are completed and attendee lists are updated upon RSVP's. The President and applicable Development Officers receive final briefings each Wednesday before a home game. An addendum is provided on Friday if updates need to be made.



*Briefing numbers are per couple invited to attend the game.

SPECIAL EVENTS

Similar to football game days, the Assistant Director also creates Presidential briefings for Development-related events. These events include: Annual Peabody Awards, regional dinners and events, and donor-hosted dinners.

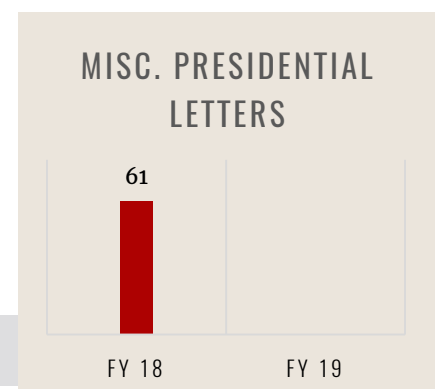


FY18 marked the first year for recording this data.

MISCELLANEOUS PRESIDENTIAL DEVELOPMENT LETTERS

Assistant Director of Presidential Stewardship

In addition to Presidential gift acknowledgements, Presidential Stewardship includes miscellaneous letters to donors from the President. These letters include follow-up letters from Presidential visits and congratulatory letters for high-level appointments or major life events. All condolence letters are handled solely by the President's Office.



FY18 marked the first year for recording this data.

STUDENT GRATITUDE

Based on the outstanding success of our Thank A Donor Day efforts, ThankU was designed as our overall student gratitude marketing plan. The idea is to create opportunities throughout the year – “from orientation to graduation” – for students to say thank you. We want UGA to be known for its thankful students, and ThankU is our part in creating an “attitude of gratitude” at UGA.

THANKU

An attitude of gratitude at UGA.

SCHOLARSHIP RECIPIENT GRATITUDE

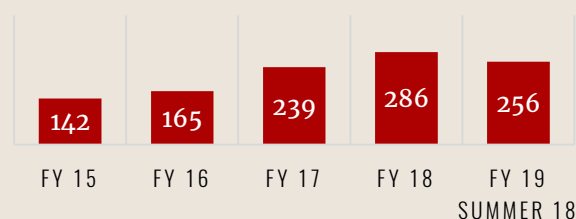
Assistant Director of Scholarship Stewardship

THANKU! ORIENTATION

One of the greatest challenges in stewarding scholarship donors (see Scholarships on page 25) is collecting recipient thank you notes. When we began ThankU! Orientation in 2015, we hoped that reaching students early—when they first arrive on campus for Orientation—would increase participation. This strategy showed great success! Incoming Freshmen are excited, grateful, and eager to participate.

As a result of our ThankU efforts, Admissions scholarship stewardship has been taken to higher level. Students are participating in philanthropy from day one! Through our collaboration with the Office of Undergraduate Admissions, our office requests scholarship thank you messages over the summer, and we connect with these students during UGA’s Orientation resource fair. Attending Orientation allows us to target Admissions-awarded scholarship recipients as Freshmen and communicate more effectively about the source of their scholarship funds. We also use this time to encourage their participation later on in the year at events like Thank A Donor Day.

THANKU! ORIENTATION QUESTIONNAIRE PARTICIPANTS



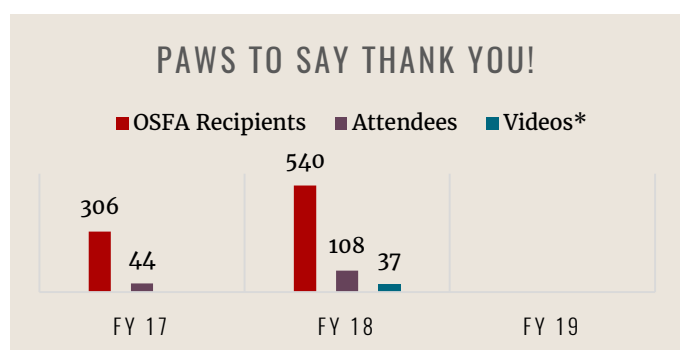
*FY19 scholarships were awarded Summer 2018. This number is still in progress.

ThankU! Orientation began in FY14.



PAWS TO SAY THANK YOU!

PAWS to Say Thank You! was enacted in 2017 as a chance for our Financial Aid Scholarship recipients to say an additional thanks to their scholarship donors beyond our standard Gratitude Report mailing (see Scholarships on page 25). This collaborative event with the Office of Student Financial Aid (OSFA) occurred during the first week of class in August. FY19's PAWS to Say Thank You is being reorganized into a multi-day program in order to fit into as many student schedules as possible. Participants' hand written thank you notes and Thank View videos (see Scholarships on page 25) will be collected and strategically shared with individual donors. Recipients will continue to receive award letters in June that include a request to fill out the online gratitude questionnaire that becomes their Gratitude Report delivered to donors each spring.



*Videos began in 2017.



PAWS to Say Thank You! began in FY17.

GRADITUDE!

GRADitude! is a program within the ThankU marketing plan that focuses on encouraging an attitude of GRADitude for our graduating seniors. By helping them see the impact private support has had on their college career, we hope to better educate our soon-to-be alumni about the importance of philanthropy and the role they will play as graduates of UGA. In FY19, we will be partnering with Career Center during programs in April that focus on graduating seniors, like the popular Pics with Hairy Dawg event at Tate Plaza.

GRADitude began in FY17.

We are experimenting with new initiatives to increase participation and look forward to growing this program in the future.

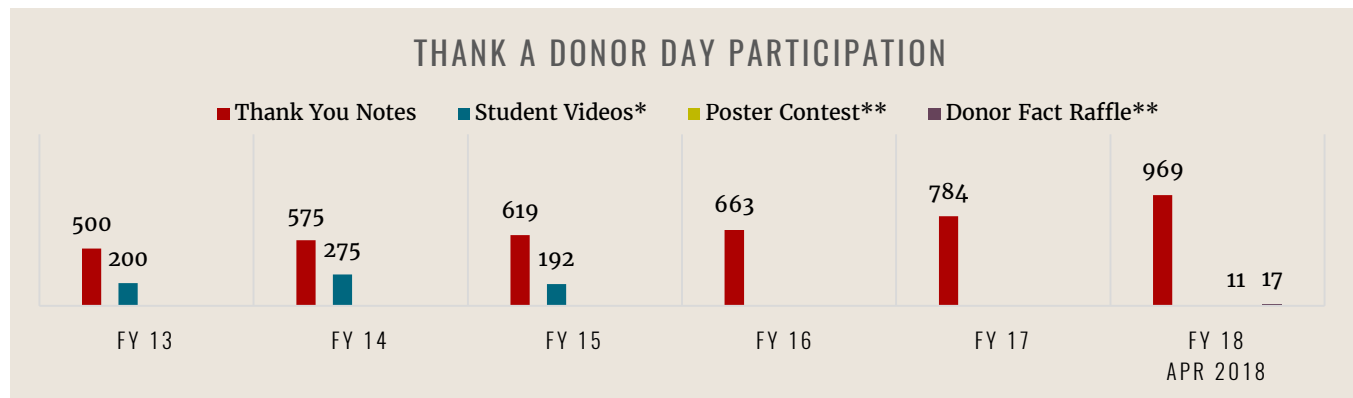


UNIVERSITY-WIDE STUDENT GRATITUDE

Assistant Director of Presidential Stewardship

THANK A DONOR DAY

In an effort to create a culture of philanthropy at UGA, Donor Relations and Stewardship instituted UGA's first ever Thank a Donor Day in 2012. The entire UGA community is invited to observe this day of gratitude. The purpose of Thank a Donor Day is to educate students about the impact of private giving by demonstrating the difference it makes to their educational experiences while emphasizing the importance of thanking donors for their generosity.



*The Video station ceased for FY16 due to the increasing number of students attending.

**The Group Poster Contest and Donor Fact Social Media Raffle began in 2017.

Thank a Donor Day began in FY12.

The occasion is also a perfect opportunity to collect student thank you notes, photos, video messages and other expressions of gratitude in an effort to acknowledge the generosity of our donors in a personal way. During our seventh annual Thank a Donor Day, we exceeded our goal by collecting over 950 student thank you notes—all from enthusiastic students expressing their sincere gratitude to UGA donors. Our large thank you card was completely filled with signatures, and we ran out of t-shirts and cookies to give away to participants. We will continue to utilize this event to educate our students and to steward our donors.



TEAM STEWARDSHIP

Conducting a campus-wide stewardship audit and creating a campus-wide stewardship community was something Donor Relations and Stewardship hoped to have the ability to do for several years. The survey developed into meaningful conversations that clarified our unique, decentralized stewardship structures and inspired great, new ideas. Having identified the “Stewies” in our many units through this process, Team Stewardship now meets on a quarterly basis to discuss donor relations best practices and highlight stewardship efforts across campus.



QUARTERLY MEETINGS

Assistant Director of Donor Relations and Stewardship

We work to create a stewardship community across the University by bringing together those who are involved in donor relations efforts. Donor stewardship by the central office versus individual schools and programs is not an either/or proposition. When the central office does things well, decentralized units can devote resources toward specializing stewardship for their current and prospective donors. Donor Relations and Stewardship offers leadership and support while creating opportunities for everyone to learn from each other. We offer campus-wide updates and donor relations best practices, highlight Stewie successes, and support this group through open discussion with creative ideas and professional development inspiration.



THE STEW

Donor Impact Coordinator



Following the second meeting of Team Stewardship, Donor Relations and Stewardship implemented an enhanced version of “meeting minutes.” Produced in-house, *The Stew* is a 5-to-10-page newsletter that provides an overview of the meeting and links to supplementing materials. With professional and optimistic language, it also serves to highlight recent successes of our Stewies and elevates the work that takes place each meeting when shared with administration. *The Stew* has grown progressively more eye-catching with each issue and is now uploaded to the Development and Alumni Relations Issuu account. One-month after Team Stewardship, the Assistant Director of Donor Relations and Stewardship sends an email that includes a link to *The Stew*, as well as a Save the Date for the next meeting or webinar.

CAMPUS-WIDE STEWARDSHIP SURVEYS

With a decentralized Development structure, it is difficult to take a clear snapshot of stewardship that occurs as each gift is made. To better understand the University's stewardship and difficulties our units face, Donor Relations and Stewardship has taken two campus-wide surveys. It was essential that these surveys were administered clearly, with a positive tone. Our team does not aim to highlight staff weaknesses or undermine a position—we aim to identify areas that need more support.

2017 SCHOLARSHIP STEWARDSHIP SURVEY

The Assistant Director of Scholarship Support and Donor Impact Coordinator recently completed a Scholarship Stewardship Survey. Stewies and their Development Directors in each unit received a personalized spreadsheet listing funds that are coded as scholarships. Over 20 units completed this checklist by marking whether or not each fund is systematically stewarded through a student thank you note. If not, they indicated a reason (for example: the fund balance is too low, it has not been awarded, or there is no donor representative). Additionally, units received a questionnaire that asked specific questions about their annual strategy for receiving thank you notes and coordinating scholarship events. We also asked if the unit faces challenges in administering their scholarship stewardship plan. The Survey results were released in November of 2017.

COMPILATION OF RESPONSES

With an participating unit sharing their stewardship practices through a questionnaire and checklist of scholarship funds, we found that Team Stewardship members meet a lot of their end of the year stewardship goals. Development and Stewardship staff have been successful in identifying and supporting scholarship funds, and the University's Development and Stewardship staff have been successful in identifying and supporting scholarship funds.

SCHOLARSHIP STEWARDSHIP MANAGEMENT

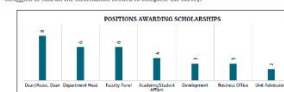
Team Stewardship members play the largest role in stewardship across campus-wide, encompassing 45% of the work, and several Directors of Development handle both fundraising and stewardship. Overall, 80% of stewardship is managed by a development staff person.

Placing the role of stewardship scholarships with Development makes sense for units, and several development coordinators that do not manage scholarship reporting with their parent's larger role.

In contrast, the many one-person shops with they had an extra hand to help with the process, so managing student thank you notes is a time-consuming task.

AWARDING

The most popular way to award scholarships is through a committee comprising of a Dean and/or Department Head and a representative from the Academic Affairs, Business Affairs, and Administration. These units identified that Development staff can also play a part in awarding funds. Some units had clearly defined roles for the committee and scholarship management, while others had more fluid processes that indicate a less organized structure. In these cases, Team Stewardship members struggled to find all the information needed to complete the survey.



2016 COMPREHENSIVE STEWARDSHIP SURVEY

After several months of preparation and getting administration on board, the concept of a Stewardship Survey was finally materialized in October 2015. For the following three-months, the Senior Director and Assistant Director met with Development staff at 23 of the University's units in their places of work. Collecting this overview of stewardship activities occurring across campus gave University Development an ability to better support our units. Through greater communication, this Survey has already encouraged collaboration and provides a baseline for the future of donor relations practices. Since its release in the Spring of 2016, this survey has fostered a more cohesive campus stewardship community.

"Team Stewardship meetings are some of the most valuable and productive I have ever attended. With each meeting, you refine my grasp of what we do and all that it can accomplish, broaden my knowledge of the many facets of stewardship at UGA, and provide tools and fresh insights to help us take our work to higher levels. I woke up looking forward to today's meeting, and left feeling inspired and energized—thank you!"

-NANCY

"I truly cannot thank you and your hard working team enough for taking the time to develop and implement Team Stewardship. I walked away with ideas that have made my working life easier (hooray!), improved my organizational techniques, and overall improved our stewardship plan... In addition to my professional growth, it was amazing to be surrounded by a group of people who can relate to my work woes and success stories. I walked away... feeling like I have allies on campus that I can call on when I have a question, and I cannot thank you enough for that."

-MICHELLE

STRATEGIC PLAN

As we move into the future, Donor Relations and Stewardship will continue to fulfill its mission of sustaining lifelong relationships with the University's donors by remaining a thoughtful and creative team that puts gratitude at the center of our efforts. We plan to improve and expand upon our donor-centered programming each year and look forward to achieving our goals.

CORE OBJECTIVES

KEEP GRATITUDE AT THE CENTER OF OUR WORK

INSPIRE INNOVATION AND COLLABORATION

ADVOCATE FOR DONOR NEEDS

ENGAGE DONORS THROUGH FRESH, MEANINGFUL STEWARDSHIP

SHARPEN PERSONALIZED STEWARDSHIP

ADVANCE THE STEWARDSHIP PROFESSION

ENCOURAGE AN "ATTITUDE OF GRATITUDE" CAMPUS-WIDE

ANNUAL GOALS

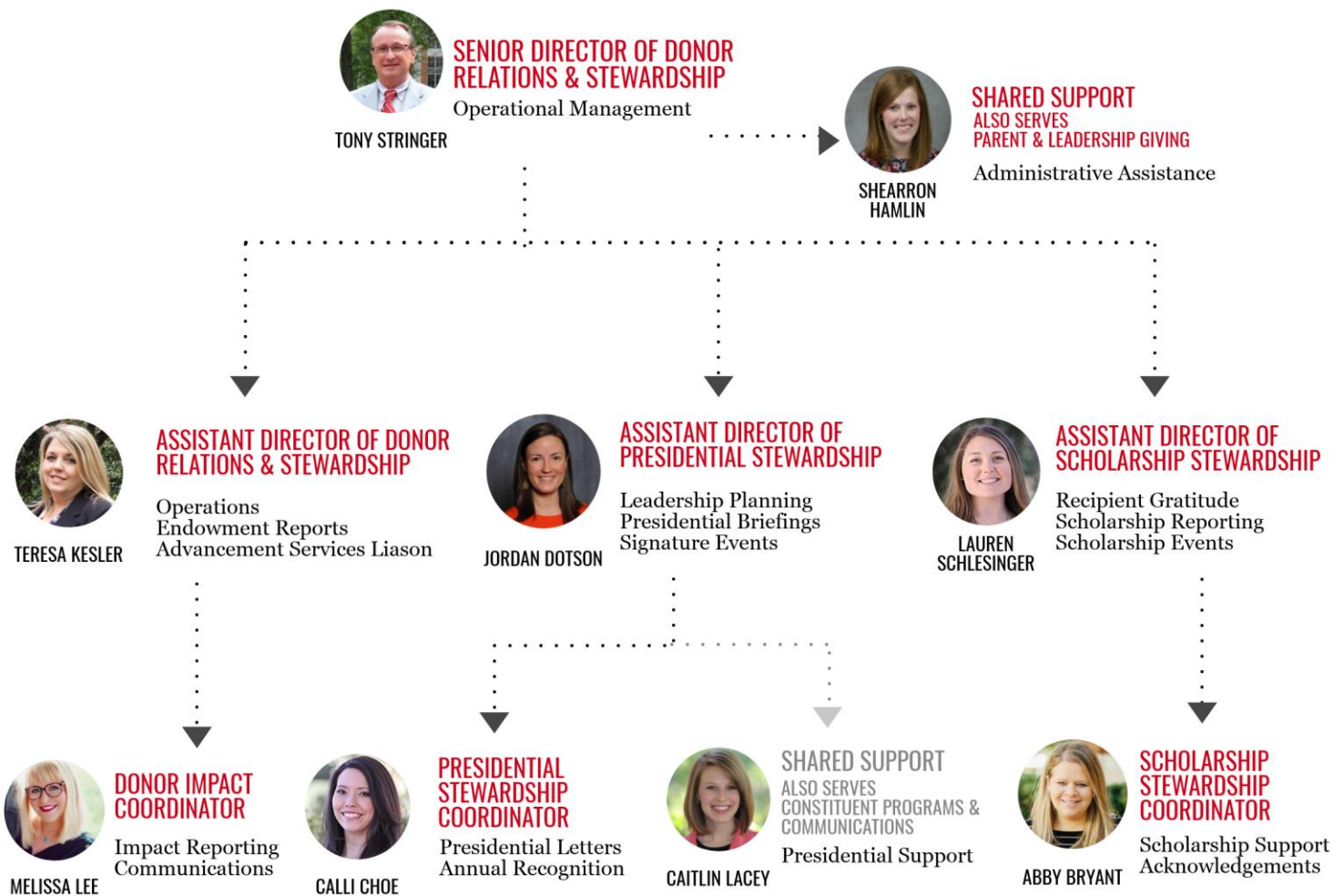
- ✓ Assess successes and struggles annually.
- ✓ Check in as a team weekly.
- ✓ Debrief from special events or project roll-outs within one-week following the project.
- ✓ Utilize Team Stewardship as a way to brainstorm and hear unit concerns before rolling out a new project.
- ✓ Develop teamwork and professional skills through Training & Development courses, webinars, and continuing education.
- ✓ Improve processes for acknowledging, reporting, recognizing, and engaging donors.
- ✓ Increase student and faculty gratitude participation.

2017 FIVE-YEAR GOALS

GOAL	FISCAL YEAR
Implement Endowed Faculty Impact Reporting	✓ 2018
Implement New Presidents Club Threshold and Decal Program	✓ 2018
Implement Donor Impact Coordinator Position	✓ 2018
Implement New Thresholds for Print and Online Honor Roll of Donors	✓ 2018
Implement Cumulative Giving Societies (CGS) Recognition Piece Delivery	✓ 2018
Increase Scholarship Recipient Participation	✓ 2018
Strategically Plan Georgia Commitment Scholarship Stewardship & Events	✓ 2018
Propose ThankU! Ambassadors/Stronger SAA Participation	✓ 2018
Advocate for an Updated Donor Relations Website	✓ 2018
Strengthen Personalized, Fund, and Endowed Faculty Impact Pieces	2019
Further Explore CGS/Platinum & Gold Presidents Club Brunch Plans	2019
Propose Raising Threshold for Presidential Gift Acknowledgements	2019
Begin Planning Post-Campaign Stewardship	2019
Implement Updated Donor Relations Website	2019
Rollout ThankView Campus-wide (Including Style Guides & Training)	2019
Collaborate with Instruction (OVPI) to Implement Campus Logic	2019
Collaborate with OVPI & Legal Affairs to Determine Student Data Policies	2019
Explore the Idea of Expanding Gratitude Reports Campus-wide	2019
Collaborate with Development Officers to Distribute CGS Recognition	2019
Collaborate with Gift & Estate Planning (GEP) in Donor Survey	2019
Further Explore Endowed Donor Giving Story Collection/Communication	2019
Build Web Presence of Scholarship/Endowed Faculty Donors	2020
Finalize Post-Campaign Stewardship Plan	2020
Create Plan to Celebrate the 10 th Anniversary of Thank a Donor Day	2020
Implement Celebration of the 10 th Anniversary of Thank a Donor Day	2021
Implement Post-Campaign Stewardship	2021
Update the Campus-wide Stewardship Survey	2021
Propose Eliminating Honor Roll of Donors	2021
Implement Endowed Faculty Event	2021
Begin Stewardship Plan for Future Campaign	2022

THE DREAM TEAM

We're fortunate to have a team of seven full-time employees and two positions of shared support. All nine of us are dedicated to our mission and goals. It's taken several years to grow our team to this size, and each of our roles have morphed according to our individual and team strengths and weaknesses.



"Great vision without great people is irrelevant."

-JIM COLLINS

SENIOR DIRECTOR OF DONOR RELATIONS & STEWARDSHIP

Tony Stringer

The Senior Director of Donor Relations and Stewardship is essential to Donor Relations and Stewardship by overseeing all projects produced by the office. By serving as the direct report for Assistant Directors and Administrative Assistance, this position supervises the team as a whole and drives the collective mission of acknowledging, recognizing, stewarding, and engaging University-wide giving at the University of Georgia.

ASSISTANT DIRECTOR OF DONOR RELATIONS & STEWARDSHIP

Teresa Kesler

The Assistant Director is essential to Donor Relations and Stewardship by supervising and training staff and student workers, assisting with budget and project management, and resolving difficult donor questions. This position is also tasked as the GAIL data analyst by fulfilling the majority of data requests, developing and running queries, and collaborating with IT to ensure that all data needs are met. The Assistant Director manages Founding Presidents Club parking and supervises the Donor Impact Coordinator, including the production of Endowed Faculty Impact Reports and Individual Impact Reports. The Assistant Director has sole responsibility for the annual Endowment Report project.

ASSISTANT DIRECTOR OF PRESIDENTIAL STEWARDSHIP

Jordan Dotson

The Assistant Director of Presidential Stewardship is essential to Donor Relations and Stewardship by serving as the liaison to various administration offices, coordinating the Presidential donor visit process, managing Donor Relations and Stewardship events, and assisting in general office management. This position works with the President's Office, Vice President's Office, Principal Gifts Team, and Office of Corporate and Foundation Relations to schedule donor visits, create briefings, and generate necessary follow-up letters or gifts, as well as manage Development-related invitation lists and guest briefings (including: Peabody Awards, President's SkySuite, Champions for Scholars, and Regional Donor Trips). The Assistant Director of Presidential Stewardship is also responsible for coordinating and executing Donor Relations and Stewardship's signature events (including: Thank a Donor Day, Faculty/Staff/Retiree Donor Appreciation Reception, and Presidents Club Reception). This role oversees the Presidential Stewardship Coordinator and administrative staff that is periodically provided to the unit, including all accounts payable processes for the Donor Relations and Stewardship. In addition, this position assists the Assistant Director of Donor Relations and Stewardship on the GAIL database (events module, import selections, etc.).

ASSISTANT DIRECTOR OF SCHOLARSHIP STEWARDSHIP

Lauren Schlesinger

The Assistant Director of Scholarship Stewardship is essential to Donor Relations and Stewardship by managing and implementing strategic stewardship for University-wide scholarship funds. This position works with Admissions, Financial Aid, and Instruction, as well as Regional and Constituent-based Development teams to ensure that endowed and non-endowed scholarship funds are properly awarded and stewarded through annual Gratitude Reports and individual stewardship as needed. The Assistant Director of Scholarship Stewardship manages the Scholarship Stewardship Coordinator to plan and implement ThankU program activities, including: Orientation, PAWS to Say Thank You, and GRADitude, to increase scholarship recipient gratitude participation. Additionally, this role oversees the acknowledgement procedures managed by the Scholarship Stewardship Coordinator, including: memorial and honorary gift, first-time donor, second-time donor, loyalty, and Georgia tag acknowledgements.

PRESIDENTIAL STEWARDSHIP COORDINATOR

Calli Choe

Reporting to the Assistant Director of Presidential Stewardship, the Presidential Stewardship Coordinator is essential to Donor Relations and Stewardship by managing the highly personalized process of Presidential gift acknowledgements and annual recognition. This position works with Development Directors and Officers to create highly-personalized mailings for the University's top donors and is responsible for generating the accurate and timely Presidential acknowledgements for major gifts and pledges, managing Presidents Club welcome packet mailings, and compiling the Honor Roll of Donors for the Annual Report to Donors. The Presidential Stewardship Coordinator also supports event management and the production of miscellaneous Presidential letters.

DONOR IMPACT COORDINATOR

Melissa Lee

Reporting to the Assistant Director of Donor Relations and Stewardship, the Donor Impact Coordinator is essential to Donor Relations and Stewardship by coordinating personalized donor communications and supporting the Office's mission through proposal-writing and presentations. This position is responsible for producing and managing new University-wide Comprehensive Donor Impact Reports, coordinating Endowed Faculty Impact Reports, developing special fund-specific impact reports, and assisting the Assistant Director as needed with Team Stewardship planning and Endowment Reports. The Donor Impact Coordinator also serves as the liaison for the Development Communications office and Donor Relations web captain for the new giving website. Additionally, this position creates internal and external presentations and proposals, maintains the Stewardship Overview and Strategic Plans, and authors the quarterly Team Stewardship Newsletter, The Stew.

SCHOLARSHIP STEWARDSHIP COORDINATOR

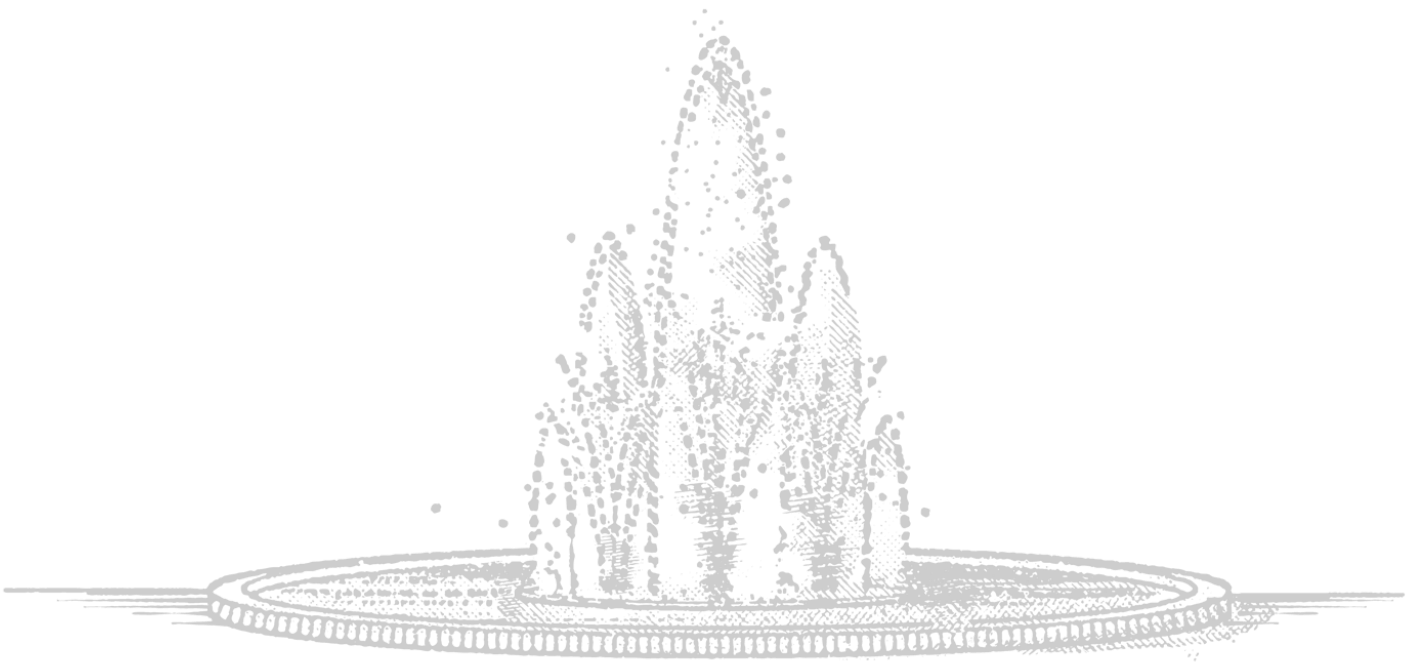
Abby Bryant

Reporting to the Assistant Director of Scholarship Stewardship, the Scholarship Stewardship Coordinator is essential to Donor Relations and Stewardship by assisting in implementing creative stewardship of University-wide scholarship funds and managing general acknowledgements. While the majority of this role supports scholarship stewardship by assisting in annual Orientation, Gratitude Reports, Recipient Notification, and PAWS to Say Thank You, the Scholarship Stewardship Coordinator devotes a weekly-work flow to other important stewardship projects, including: memorial and honorary gift notifications, and first-time, second-time, loyalty, and Georgia tag acknowledgements. This role works with all units to ensure accurate acknowledgment and assists with all Donor Relations and Stewardship events and special projects as needed.

ADMINISTRATIVE ASSISTANT

Shearron Hamlin

The Administrative Assistant is essential to Donor Relations and Stewardship by assisting the Senior Director in business affairs, including payments and reimbursements, and Milledge Center front-of-house management. This shared position also supports Parent and Leadership Giving. The Administrative Assistant manages State and Foundation check requests and staff reimbursements, travel budgets and arrangements, and fields all phone calls to Milledge Center's mail line. This position also provides proofreading support for Presidential letters, Vice Presidential scholarship letters, and Gratitude Reports. Additionally, this multi-faceted support role serves as the face of the Foundation, coordinating deliveries and interacts with many donors and staff across the University.





2019 Calendar

JULY 2018 – JUNE 2019

KEY

General Communication	Scholarship Stewardship
Presidential Stewardship	Financial & Impact Reporting
Signature Event	Communication Planning
Team Planning	Collaboration
Proposed Project	

JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE			
Presidential Gift Acknowledgements + Miscellaneous Presidential Letters <i>(weekly)</i>														
Presidents Club Welcome Packets <i>(monthly)</i>														
Georgia Commitment Scholarship VP Acknowledgements <i>(weekly)</i>														
First Time Donor + Second Time Donor + Tag Mailed Acknowledgements <i>(monthly)</i>														
First Time Donor + FSR Donor Email Acknowledgements <i>(weekly)</i>														
Third Pillar Magnet Mailing <i>(monthly)</i>														
Tribute Acknowledgements <i>(weekly)</i>														
Birthday Cards <i>(daily)</i>														
CGS Recognition <i>(monthly)</i>														
FY18 Donor Event Preparation								Thank a Donor Day Event Preparation						
	FSR Donor Reception <i>August 21, 2018</i>		Presidents Club Reception <i>September 28, 2018</i>							Thank a Donor Day <i>April 11, 2019</i>				
	Presidents Club Decal													
	Honor Roll of Donors													
Football Sky Suite Briefings <i>(weekly)</i>														
Presidential Visit Briefings <i>(as needed)</i>														
			Thanksgiving Stewardship						Thank a Donor Day Stewardship					
FY19 Orientation			Encourage Scholarship Recipient Gratitude							Encourage GRADitude			FY20 Orientation	
	FY19 Recipient Notification Letter			Thank View Videos <i>Email Delivery</i>			FY19 Gratitude Report <i>Report Production</i>			Thank View Videos <i>Email Delivery</i>				
	Individual Stewardship <i>(as needed)</i>							Woodruff Scholarship Luncheon		Individual Stewardship <i>(as needed)</i>				
FY18 Endowed Faculty Impact <i>Report Production</i>								FY19 Endowed Faculty Impact <i>Questionnaire</i>						
	Individual Impact Report <i>Donor Determined</i>					Individual Impact Report <i>TBD</i>								
			Presidents Club Newsletter							Presidents Club Newsletter				
FY18 Endowment Report <i>Report Production</i>							FY19 Endowment Report <i>Collect Unit Personalized Information</i>							
	Team Stewardship					Team Stewardship					Team Stewardship			
Stewardship Overview Closeout/Refresh			The Stew		Overview Refresh		The Stew			The Stew		Overview Refresh		The Stew
							FY20 Annual Communication Design & Planning							
Update DEV 101							Award Prep			Conference & Presentation Prep				
Strategic Planning & Proposal Writing <i>(as needed)</i>														
FY19 Roll-Out						FY20 Budget Planning				FY20 Planning & Evaluations				
		Suit Up!												
								Proposed Top Tier Presidents Club Event						



2019 Stewardship Matrix

UNIVERSITY-WIDE STEWARDSHIP BY GIFT AMOUNT

Donor Relations & Stewardship
Annual Giving
Gift & Estate Planning

☐ Current Stewardship
☐ Future Stewardship

\$1M+ Cumulative Gifts Cumulative Giving Societies	\$500K+ Annual Gifts	\$100K+ Annual Gifts	\$10K GIFTS/\$25K PLEDGES Annual Gifts Presidential Acknowledgements	\$1.5K+ Annual Gifts Presidents Club	\$1+ All Gifts	\$1+ PLANNED GIFTS Gift and Estate Planning Heritage Society
<div>CGS Presidential Welcome Letter</div> <div>CGS Presentation Piece</div> <div>CGS Name Recognition on Presidents Garden Wall</div> <div>Annual Presidents Club Reception CGS Ribbon</div> <div>President's Quarterly Newsletter</div> <div>Comprehensive Impact Reports</div> <div>President's Annual Report Honor Roll of Donors</div> <div>Birthday Card</div> <div>President's Holiday Card President's Holiday Open House</div> <div>Thank a Donor Day Video Thanksgiving Video</div> <div>Event Gold/Platinum Presidents Club</div>	<div>Presidential Letter Trustee Chairman Letter</div> <div>Presidents Club Welcome Packet Lapel Pin</div> <div>Presidents Club FY End Mailing With Giving Level Decals</div> <div>Annual Presidents Club Reception Giving Level Ribbon</div> <div>Receipt w/ UGA Donor Decal</div> <div>Biannual Impact Newsletter</div> <div>President's Annual Report Honor Roll of Donors</div> <div>Birthday Card President's Holiday Card</div> <div>Thank a Donor Day Video Thanksgiving Video</div> <div>Event Gold/Platinum Presidents Club</div> <div>Fiscal Year Giving Announcement Gold/Platinum Presidents Club</div>	<div>Presidential Letter Trustee Chairman Letter</div> <div>Presidents Club Welcome Packet Lapel Pin</div> <div>Presidents Club FY End Mailing With Giving Level Decals</div> <div>Annual Presidents Club Reception Giving Level Ribbon</div> <div>Receipt w/ UGA Donor Decal</div> <div>Biannual Impact Newsletter</div> <div>President's Annual Report Honor Roll of Donors</div> <div>President's Holiday Card</div> <div>Thank a Donor Day Video Thanksgiving Video</div> <div>Event Gold/Platinum Presidents Club</div> <div>Fiscal Year Giving Announcement Gold/Platinum Presidents Club</div>	<div>Presidential Letter Trustee Chairman Letter</div> <div>Presidents Club Welcome Packet Lapel Pin</div> <div>Presidents Club FY End Mailing With Giving Level Decals</div> <div>Annual Presidents Club Reception Giving Level Ribbon</div> <div>Receipt w/ UGA Donor Decal</div> <div>Biannual Impact Newsletter</div> <div>President's Annual Report</div> <div>Honor Roll of Donors</div> <div>Thank a Donor Day Video Thanksgiving Video</div> <div>Event Gold/Platinum Presidents Club</div> <div>Fiscal Year Giving Announcement Gold/Platinum Presidents Club</div>	<div>Presidents Club Welcome Packet Lapel Pin</div> <div>Presidents Club FY End Mailing With Giving Level Decals</div> <div>Annual Presidents Club Reception Giving Level Ribbon</div> <div>Receipt w/ UGA Donor Decal</div> <div>Biannual I Impact Newsletter</div> <div>President's Annual Report</div> <div>If \$1.5K-\$4,999 Online Honor Roll of Donors</div> <div>If \$5K+ Printed Honor Roll of Donors</div> <div>Thank a Donor Day Video Thanksgiving Video</div>	<div>Receipt w/ UGA Donor Decal</div> <div>Thank a Donor Day Video</div> <div>Thanksgiving Video</div> <div>RECENT GRADS (UNDER 40) Note from a Student</div> <div>\$1K+ TO UNRESTRICTED Campaign Milestones</div> <div>Stewardship Calls from Call Center</div> <div>MATCHING GIFT RECEIVED Email Thank You</div>	<div>Presidential Letter</div> <div>Hand-written Letter from Director of Gift & Estate Planning</div> <div>Welcome Packet: Lapel Pin, Certificate, Decal Vinyard Vines Tie/Scarf</div> <div>Annual Presidents Club Reception Heritage Society Ribbon</div> <div>Biannual Impact Newsletter</div> <div>President's Annual Report</div> <div>Honor Roll of Donors</div> <div>Presidents Holiday Card Birthday Card Condolence Card</div> <div>GA Legacy Newsletter Mailing</div> <div>Annual Impact Statement</div> <div>Thank a Donor Day Video Thanksgiving Video</div>



2019 Stewardship Matrix

UNIVERSITY-WIDE STEWARDSHIP BY TYPE OF DONOR

☐ Current Stewardship
☐ Future Stewardship

FIRST-TIME DONORS	SECOND-TIME DONORS	LOYALTY DONORS Three-Consecutive Years Third Pillar	FACULTY, STAFF & RETIREE DONORS	SCHOLARSHIP DONORS Annual Stewardship	ENDOWED FACULTY DONORS Annual Stewardship	OTHER SPECIAL STEWARDSHIP Per Donor
<div>Email Acknowledgement Thank a Donor Day Video <i>(previous fiscal year)</i></div>	<div>Second-Time Donor Card</div>	<div>Third Pillar Card with Presidential Message Third Pillar Magnet</div>	<div>Annual Faculty, Staff & Retiree Donor Appreciation Reception w/ President</div>	<div>Annual Endowment Reports <i>All Scholarships</i></div>	<div>Annual Endowment Reports</div>	<div>ENDOWED FUNDS <i>All Endowed Fund Donor Representatives</i> Annual Endowment Report</div>
<div>First-Time Donor Card</div>	<div>Receipt w/ UGA Donor Decal</div>	<div>Receipt w/ UGA Donor Decal</div>	<div>Special Email Acknowledgement w/ Student Thank You</div>	<div>Recipient Names on Endowment Reports <i>All Scholarships</i></div>	<div>Holder Names on Endowment Reports</div>	<div>GA VEHICLE TAG <i>Donors that Purchase a GA UGA License Plate</i> Postcard and Email</div>
<div>Receipt w/ UGA Donor Decal</div>	<div>Annual Thank a Donor Day Video <i>(current fiscal year)</i></div>	<div>Annual Thank a Donor Day Video <i>(current fiscal year)</i></div>	<div>Receipt w/ UGA Donor Decal</div>	<div>Scholarship Gratitude Report <i>Endowed Scholarships OSFA & Admissions</i></div>	<div>Annual Endowed Faculty Impact Report</div>	<div>TRIBUTES Letters sent to Honoree or Next-of-Kin of the Tributee</div>
<div>Annual Thank a Donor Day Video <i>(current fiscal year)</i></div>	<div>Annual Thanksgiving Video</div>	<div>Annual Thanksgiving Video</div>	<div>Annual Thank a Donor Day Video <i>(current fiscal year)</i></div>	<div>Scholarship Gratitude Report <i>Select Non-Endowed Scholarships OSFA & Admissions</i></div>	<div>Listing of Endowed Faculty w/ Donor Biographies on Website</div>	<div>FOUNDING PRESIDENTS CLUB <i>(closed membership)</i> Presidents Club Stewardship (no annual decal) Name Recognition on Presidents Garden Wall</div>
<div>Annual Thanksgiving Video</div>	<div>If \$1.5K+ Annual Presidents Club Stewardship</div>	<div>If \$1.5K+ Annual Presidents Club Stewardship</div>	<div>Annual Thanksgiving Video</div>	<div>Scholarship Impact Video <i>All Scholarship Donors, Including Unrestricted</i></div>	<div>Endowed Faculty Medallion Ceremony</div>	
<div>If \$1.5K+ Annual Presidents Club Stewardship</div>	<div>If \$10K+ Presidential Acknowledgement Stewardship</div>	<div>If \$10K+ Presidential Acknowledgement Stewardship</div>	<div>If \$1.5K+ Annual Presidents Club Stewardship</div>	<div>VP Letter <i>Georgia Commitment Scholarships</i></div>		
<div>If \$10K+ Presidential Acknowledgement Stewardship</div>	<div>If \$100K+ \$100K+ Annual Giving Stewardship</div>	<div>If \$100K+ \$100K+ Annual Giving Stewardship</div>	<div>If \$10K+ Presidential Acknowledgement Stewardship</div>	<div>Listing of Scholarships w/ Donor Biographies on Website</div>		
<div>If \$100K+ \$100K+ Annual Giving Stewardship</div>	<div>If \$500K+ \$500K+ Annual Giving Stewardship</div>	<div>If \$500K+ \$500K+ Annual Giving Stewardship</div>	<div>If \$100K+ \$100K+ Annual Giving Stewardship</div>	<div>Thank View Videos Hand-written Notes <i>Select Donors</i></div>		
<div>If \$500K+ \$500K+ Annual Giving Stewardship</div>			<div>If \$500K+ \$500K+ Annual Giving Stewardship</div>	<div>Individualized Luncheons <i>Top Scholarship Donors</i></div>		