



UNIVERSITY OF
GEORGIA

FISCAL YEAR
2020

DONOR RELATIONS & STEWARDSHIP



STEWARDSHIP OVERVIEW

QUARTERLY REPORT & STRATEGIC PLAN

JULY 2019



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DONOR RELATIONS & STEWARDSHIP

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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, 2019, this issue illustrates our growth over five-years, current plans, and future goals for FY20 and beyond.

Both the quantity and quality of our work progresses with each issue. Since July 2018, we've gained two new full-time employees, hosted more meaningful Team Stewardship meetings, implemented our first annual Thanksgiving card, saw many difficult changes with scholarships due to a reinterpretation of the Higher Education Act, moved across campus to a new office, 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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“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.

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.

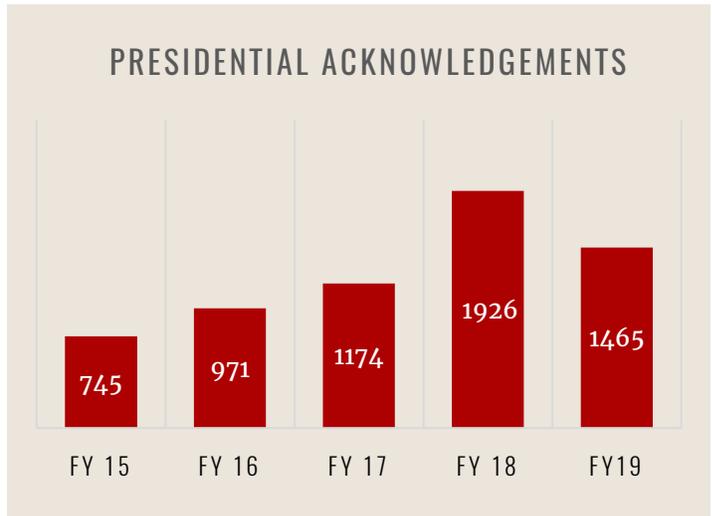
PRESIDENTIAL GIFT ACKNOWLEDGEMENT

Presidential Stewardship Coordinators

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.

WEEKLY MAILING



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 Reporting Coordinator for previous Stewardship Overviews.

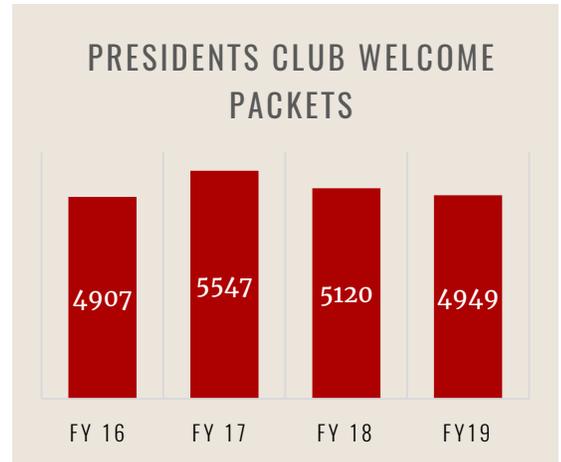


PRESIDENTS CLUB WELCOME ACKNOWLEDGEMENT

Presidential Stewardship Coordinators

Named to honor the past leadership of the University of Georgia, the 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 Packet stewardship efforts began in 2014.



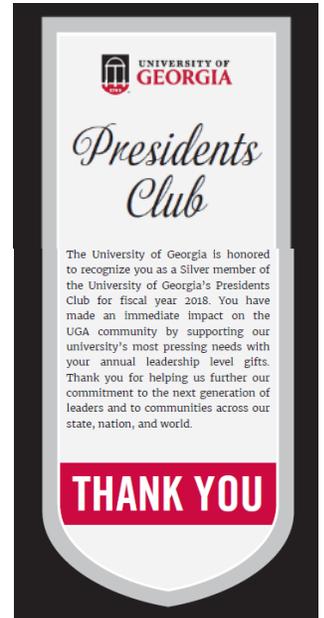
The threshold for Presidents Club was raised from \$1,000 to \$1,500 in FY18.

PRESIDENTS CLUB YEAR-END DECAL ACKNOWLEDGEMENT

Presidential Stewardship Coordinators

ANNUALLY IN AUGUST

The new Presidents Club threshold in 2018 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.

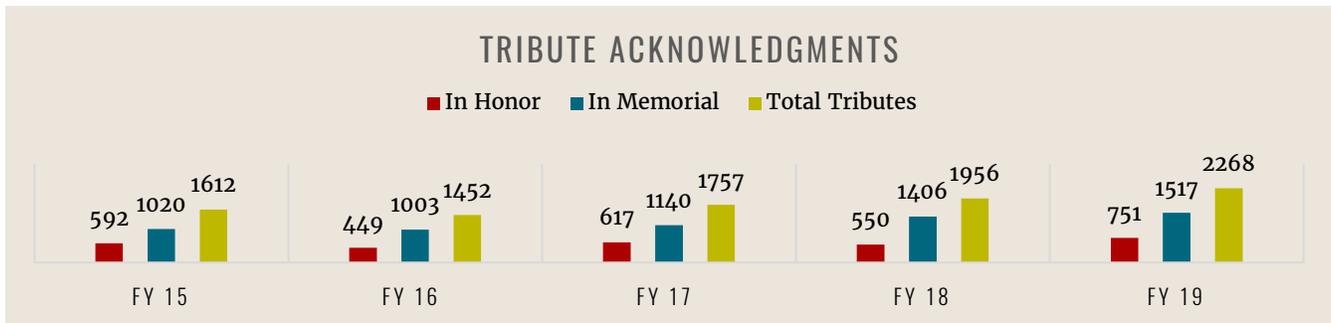


MEMORIAL & HONORARY GIFT NOTIFICATION

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

**Donor Reporting Coordinator
Scholarship Stewardship Coordinator**

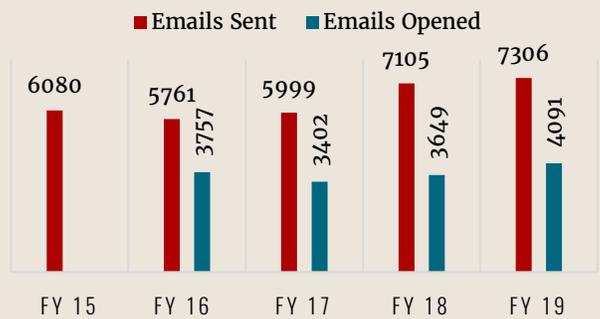
MONTHLY MAILING

First-time donors receive a specialized message through direct mail and e-mail welcoming them to the family of thousands of UGA donors. The email 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



University of Georgia Famous Firsts

- 1785: First state-chartered public university
- 1786: First president
- 1806: First permanent campus building
- 1897: First university mascot movie star
- 1929: First football game at Sanford Stadium
- 1946: First garden club in America
- 2007: First School of Ecology in the world
- 2016: First UGA experiential learning program
- TODAY**: Your first gift! THANK YOU!



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.

UNIVERSITY OF GEORGIA
Donor Relations & Stewardship
ugadonor@uga.edu
1-800-444-6644 | 706-542-1049

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 Keener
Kelly Keener
Vice President for Development and Alumni Relations

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

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

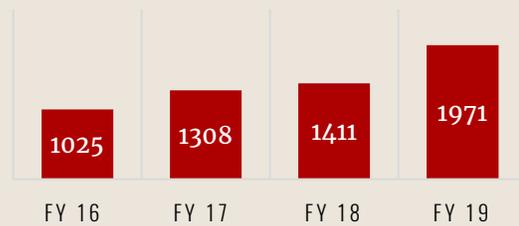
SECOND-TIME GIFT ACKNOWLEDGEMENT

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.



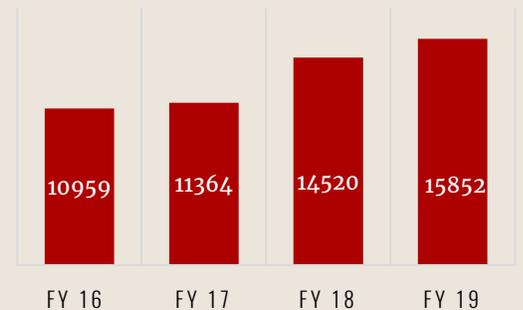
THIRD PILLAR LOYALTY DONOR ACKNOWLEDGEMENT

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



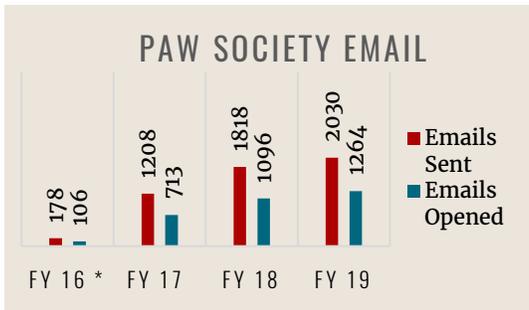
Donor Relations and Stewardship assumed responsibility for Third Pillar in 2014.

PAW SOCIETY WELCOME ACKNOWLEDGEMENTS

**Donor Reporting Coordinator
Scholarship Stewardship Coordinator**

**WEEKLY EMAIL
MONTHLY MAILING**

Faculty, staff, and retiree donors are welcomed into the Philanthropy at Work Society with an email and card thanking them for their first donation each fiscal year (see Recognition on page 16). The email includes a special video message from the Student Government Association President, and the card includes a special desktop keepsake.



*A query error occurred in FY 16—only first-time donors received the message.



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.uogfoundation.org/charity>.
communication.preferences | privacy.policy | view in browser

Faculty and staff stewardship efforts began in 2014 with an email and event.

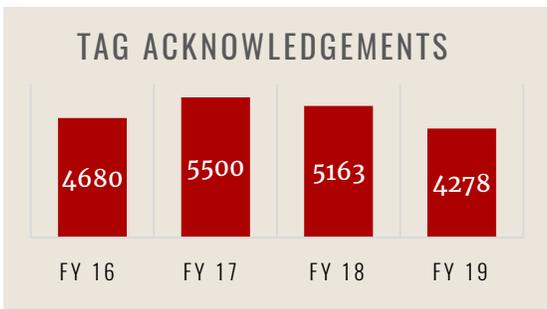
PAW Society branding begins in FY20 with the additional mailing.

GEORGIA VEHICLE TAG ACKNOWLEDGEMENT

Scholarship Stewardship Coordinator

MONTHLY MAILING

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.



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

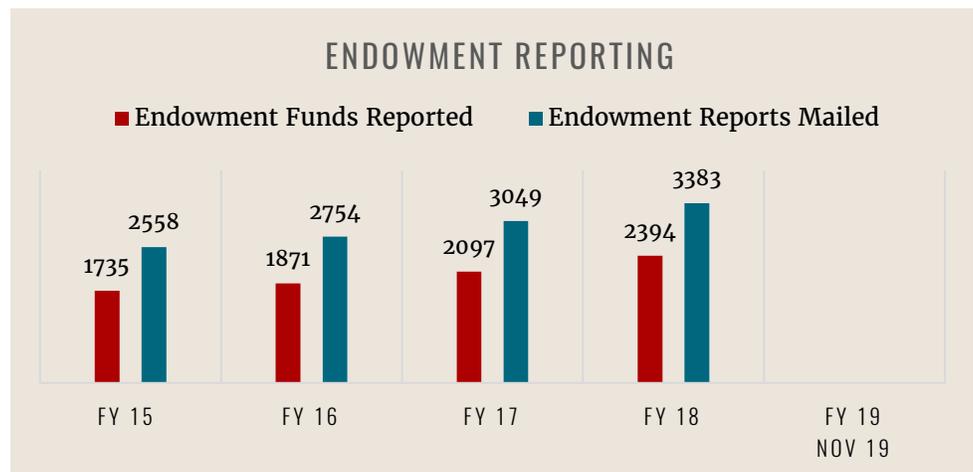
Project Manager

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 FY19 will be mailed November 2019. FY19 reports will welcome a new design format to be reflected in future overviews.



ENDOWMENT REPORT

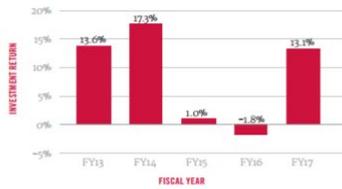
The University of Georgia Scholarship Fund

FINANCIAL SUMMARY
July 1, 2016 – June 30, 2017

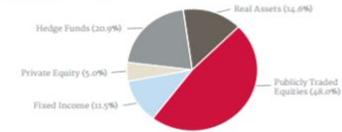
| | Annual Summary |
|---------------------|----------------|
| Beginning Balance | \$250,685.05 |
| Gifts | \$10,000.00 |
| Other Revenue | \$0.00 |
| Investment Returns | \$30,463.28 |
| Disbursements | (\$6,760.00) |
| Administrative Fees | (\$2,836.56) |
| Other Activity | \$5,125.00 |
| Ending Balance | \$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 ensure 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.

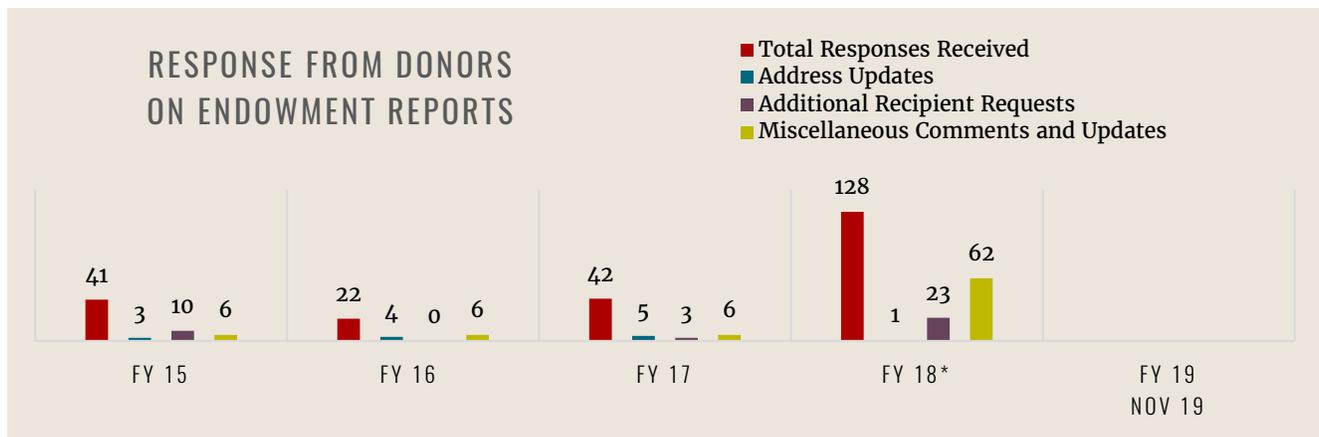
Scholarship Recipient(s)

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.



*A survey was included in the response envelope in FY18. Please reach out to the Project Manager for details.



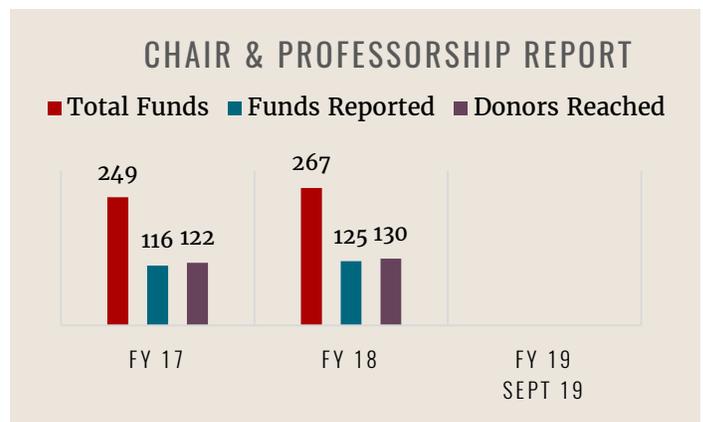
*“Gifts Received” identifies checks mailed in response to the Endowment Report, and “Additional Gifts to Endowment” identifies all gifts given to stewarded endowed funds.

ENDOWED FACULTY IMPACT REPORTING

**Assistant Director of Donor Reporting and Communications
Donor Reporting Coordinator**

ANNUALLY IN THE FALL

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.



2019 Endowed Faculty Impact

Emily & Ernest Woodruff Chair in International Law

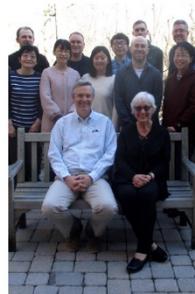


DIANE AMANN
SCHOOL OF LAW
Department of International Law

Caborezori dem. Qui cum ventis autem facesequi dignimetur aut eos et militaquamus et inctio iliquid ma velenis conedis entem quatum quam si omnist il dolore vellamet reped molor alibus doluptar.

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THANK YOU FOR SUPPORTING THE UNIVERSITY OF GEORGIA THROUGH ENDOWED CHAIRS AND PROFESSORSHIPS.

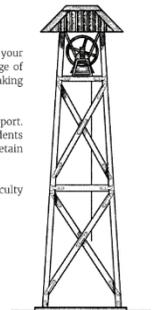
We are pleased to provide you with a report demonstrating the impact of your commitment to education and research. Your report includes a personal message of gratitude from your fund's recipient. By supporting faculty endeavors, you are making a difference in the way UGA shares knowledge and serves our community.

Every day, these committed recipients benefit from the flexibility of endowed support. Assistantships, salary supplements, and updated technology attract promising students and respected faculty. Endowed funds such as yours ensure that we recruit and retain leading minds to address the global challenges of today and tomorrow.

Thank you again for your continued investment in the University of Georgia's faculty and their research, teaching and service efforts.

Sincerely,
Kelly Kerner

Kelly Kerner
Vice President for Development and Alumni Relations




2019 Endowed Faculty Impact Report

TOGETHER, WE CAN MAKE THE WORLD BETTER, SAFER, AND STRONGER.



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

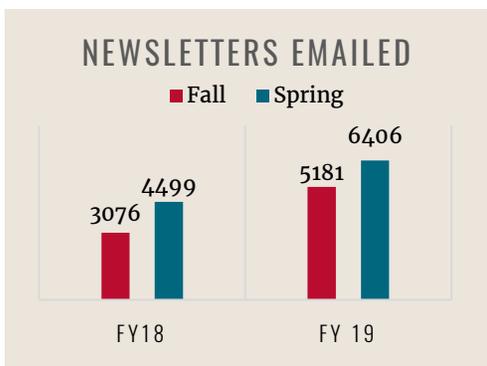
Endowed Faculty Reports reflecting FY19 will be mailed Fall 2019.

PRESIDENTS CLUB IMPACT NEWSLETTER

**Assistant Director of Donor Reporting and Communications
Donor Reporting Coordinator**

BIANNUALLY IN SPRING/FALL

To strengthen stewardship for our recently increased threshold of the 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. Newsletters have received a 45-50% open rate each time.



DAWGS SUIT UP



Last fall, one of many programs supported by the Venture Fund was the UGA Career Center's Dawgs Suit Up scholarships. Through this fundraising effort, the Career Center was able to award scholarships to 100 of the more than 2,100 students who attended Dawgs Suit Up in September; these students received full professional outfits completely free of charge at Kikweny. They now have the professional attire they need to pursue their dream jobs.

"This scholarship has been so helpful in relieving the stress that goes along with buying professional attire. I will be using my purchase for medical school interviews, and this scholarship came at just the right time!"
- Cody Blanchard '18

Presidents Club Newsletters receive an average 45-50% open rate.

The first Presidents Club Impact Newsletter was emailed in FY18.

TRUSTEE IMPACT REPORTING

**Assistant Director of Donor Reporting and Communications
Donor Reporting Coordinator**

Beginning in fall 2019, the Foundation Board of Trustees will begin receiving a stewardship touch each fall that illustrates the philanthropic impact that the board has made on the University during the previous fiscal year. This report will be delivered during the fall quarterly meeting—the same meeting that trustees are given the Presidents Annual Report. The new Donor Reporting Coordinator will work to enhance the report delivered in fall 2020 by including an individual giving insert tailored for each trustee.



The first Trustee Impact Report reflecting FY19 will be delivered Fall 2019.

PRESIDENT'S ANNUAL REPORT

University/Division Communications Presidential Stewardship Coordinators

ANNUALLY IN SEPTEMBER

The *President's Annual Report* is collaboratively produced by University-wide and Development and Alumni Relations Marketing and Communications teams. The report highlights initiatives, provides an Honor Roll of Donors listing of prominent donors (see Recognition on page 16), and presents a financial profile of the past fiscal year. Primarily, Donor Relations and Stewardship provides the Honor Roll data, and a few of our photographs and messages of gratitude from students and faculty are often incorporated in the report.

As of 2018, the *President's Annual Report* will be mailed to the following donors: Annual donors of \$1,500 and above; donors of \$5,000 and above over the past five-years; donors who have given \$100,000 and above cumulatively, Heritage Society members, and Founding Presidents Club members. Other non-donor constituencies include: Board of Regents, Alumni Association Board, Real Estate Foundation Board, Athletic Association Board, and various university partners and peers. Athletic ticket priority gifts are included when considering these thresholds.

*The President's Annual Report merged with the Foundation Annual Report in 2017, causing for a sharp increase in the number of constituents receiving the report.



UNIVERSITY OF GEORGIA
2017 ANNUAL REPORT TO DONORS

CHANGING LIVES FOR THE BETTER

The ultimate success of this campaign will be measured not only by the number of dollars raised but also—and more importantly—by the number of lives changed. Increasing scholarship support for our students will open doors to unparalleled opportunities that can alter the course of their lives and the lives of their families for generations to come.

Continuing to enhance the University's world-class learning environment will ensure that graduates from the state's flagship university are prepared for leadership and service in every sector of our society in the 21st century.

And focusing the University's vast resources and expertise around the grand challenges of our time will place UGA on the forefront of helping to create a better quality of life for all, honoring the institution's noble land-and-sea-grant mission.

For more than 230 years, the University of Georgia has been deeply committed to transforming lives. This campaign is laying the foundation for even greater impact for centuries to come.

Growth in PRIVATE GIVING



to enrich the quality of education at the University by supporting scholarships, endowed chairs that rely on private funds. With more than \$1 billion in assets, a large portion of which is endowed, the Foundation provides an average of more than \$65 million each year to advance UGA's missions of

trustees comprised of 51 volunteer members, and its mission is to oversee and promote fundraising activities, accept and manage all assets of the Foundation for the long-term benefit and to offer broad advice, consultation, and support to University

since the organization was established in 1937, enabling the growth of the endowment. As a steward of donor funds, the Foundation has an excellent track record of prudent investment management. For more than 10 years, its investment portfolio

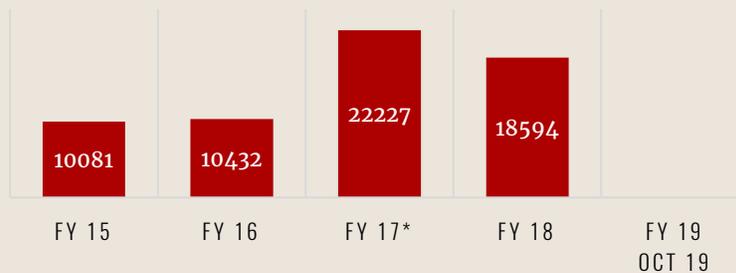
strong 13.1 percent investment return in FY17, the Foundation has restricted resources in the year ahead than ever before, including a record number of merit-based undergraduate scholarships.

IN FY17, THE FOUNDATION EARNED A
13.1%
investment return



Kelly Keener, Vice President for Development and Alumni Relations and Executive Director of the UGA Foundation, building a culture of philanthropy at the University of Georgia has been Keener's top priority since his arrival in June 2016, and under his team, fundraising continues to surge.

PRESIDENT'S ANNUAL REPORT



The Presidents Annual Report reflecting FY19 will be mailed Fall 2019.

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 Coordinators

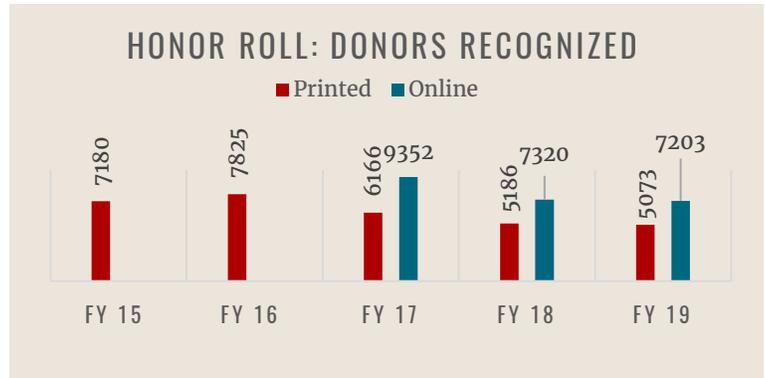
ANNUALLY IN SEPTEMBER

Every UGA donor is an important part of our collective success. Since the inception of the 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 10), 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
- Mr. K. Mallon 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 FY19 will be mailed in the Fall 2019.

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, Philanthropy at Work Society, and Heritage Society. Except for Heritage Society, all communications, membership management and related events are coordinated by the Donor Relations and Stewardship.

ANNUAL GIVING SOCIETIES

ANNUAL PRESIDENTS CLUB

Presidential Stewardship Coordinators

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. The Presidents Club is stewarded through a Welcome Packet when a donor reaches the \$1,500 threshold (see Acknowledgements on page 4) 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 4) that aligns with his/her giving and a Biannual Impact Report each fall and spring (see Reporting on page 10).

PRESIDENTS CLUB TIERED GIVING LEVELS

Effective July 1, 2017



Presidents Club began in 1973. Donor Relations and Stewardship began recording this information in 2013. Please see Presidents Club Welcome Packets on page 5 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

PHILANTHROPY AT WORK SOCIETY Scholarship Stewardship Coordinator

Beginning in July 2019, Philanthropy at Work Society (PAWS) recognizes faculty, staff, and retirees who go above and beyond in their commitment to the University by giving an annual gift. Members are thanked each year with a video from the Student Government President, a mailed acknowledgement with a desktop keepsake, and an invitation to the annual PAWS Reception.

Philanthropy at Work Society was established in FY20.

CUMULATIVE GIVING SOCIETIES

Assistant Director of Presidential Stewardship

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).



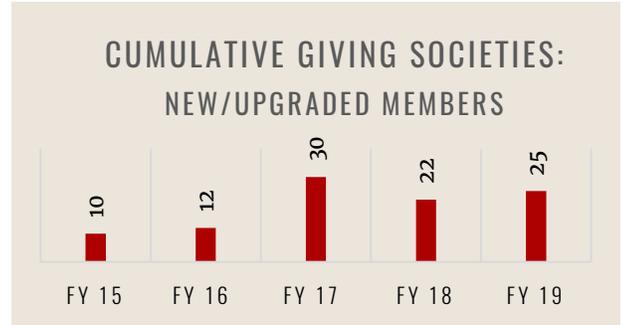
Limited edition print of the President's Garden by
Katherine Schuber

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 and began recording this information in 2012.

LOYALTY GIVING SOCIETY

THIRD PILLAR Scholarship Stewardship Coordinator

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.

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

Heritage Society is managed by the Office of Gift and Estate Planning 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 context to the magnitude of their generosity. Individuals are automatically welcomed into membership once they have documented a commitment. Members 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 the PAWS Reception honoring our faculty, staff and retiree donors. We are focused on making these events as donor-centered and meaningful, and we continue to create opportunities that make it easy 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 are shared with development staff around campus.

THE PRESIDENTS CLUB RECEPTION

Assistant Director of Presidential Stewardship

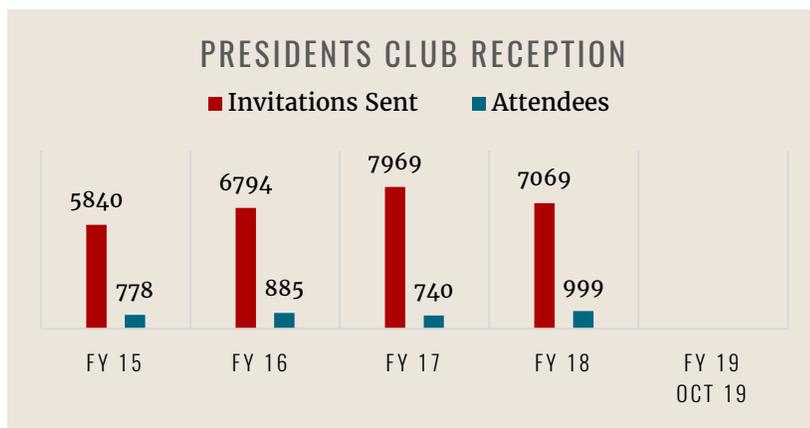
ANNUALLY IN THE FALL

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.

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 was the last reception recognizing Presidents Club members at the previous threshold of \$1,000. The Reception honoring FY19 giving will take place Fall 2019.

PHILANTROPY AT WORK SOCIETY (PAWS) RECEPTION

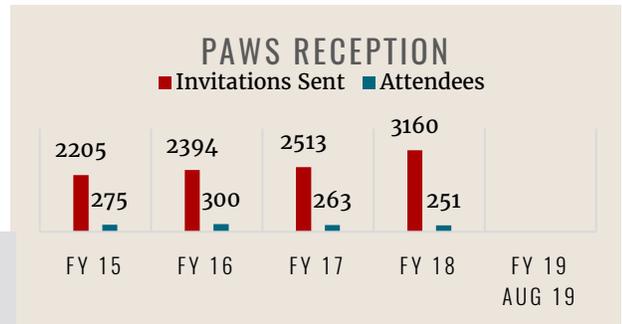
Assistant Director of Presidential Stewardship

ANNUALLY IN THE FALL

PAWS 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 honor faculty, staff, and retirees 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 those who are lapsed donors or who have never given.



Donor Relations and Stewardship began recording this information in FY13.

2018 RECEPTION



2017 RECEPTION



The Reception honoring FY19 giving took place August 2019.

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.

SEASONAL MESSAGING

Blanket, seasonal messages are a great way to let donors hear first-hand about the impact of their gifts. We bring the campus (including sights, sounds, accents, etc.) to them across the country and the world. Through these messages, we touch all donor groups in a meaningful and cost-effective way.

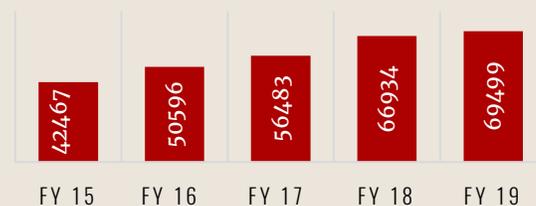
THANK A DONOR DAY VIDEO

Assistant Director of Presidential Stewardship

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 4), and in several more communication pieces throughout the division throughout the following fiscal year.

Thank a Donor Day video messaging stewardship began in FY13.

THANK A DONOR DAY VIDEO EMAIL RECIPIENTS



THANK U
An attitude of gratitude at UGA.



On April 11, we hosted our eighth annual Thank a Donor Day at the University of Georgia. Students gathered in Tate Plaza to write cards and craft posters expressing their gratitude for donors like you. Each student's UGA experience is different, 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.



Watch the Video

View the 2019 Thank a Donor Day video:

<https://www.youtube.com/watch?v=c6D9UaGsTcQ>

“Thank you for sending this ... it’s the first piece I’ve seen in a while that really made me excited and made me reach for my wallet. A nicely done job ... As an alum (BA’92) and now a fundraising consultant, I’m really impressed. All the best.”

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 ... I just cannot tell you how this video got straight to my heart. Thank you and Go Dawgs!”

DKM – FALLS CHURCH, VIRGINIA

THANKSGIVING VIDEO

Senior Director of Donor Relations and Stewardship

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 FY17 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%!

“This one actually choked me up. Great job, well done!”
NJQ – ATLANTA, GEORGIA

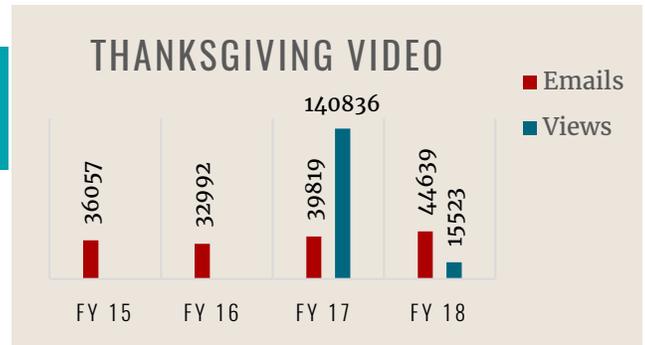


HAPPY THANKSGIVING

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](#)



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

View the FY18 Thanksgiving video:

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

View the FY17 Thanksgiving video:

<https://www.youtube.com/watch?v=Ux0Hy52PJs>

Thanksgiving messaging stewardship began in FY13.

THANKSGIVING POPUP CARD

Assistant Director of Donor Reporting and Communications Donor Reporting Coordinator

The fall of FY19 saw lots of changes for our Donor Relations family with maternity leaves and a sudden news that our office space was moving across campus. We did not send an FY19 video message but did initiate our first Top Donor Thanksgiving Popup Card to Platinum Presidents Club, Cumulative Giving Societies, and Trustees. This new, annual stewardship will begin to be recorded in FY20.

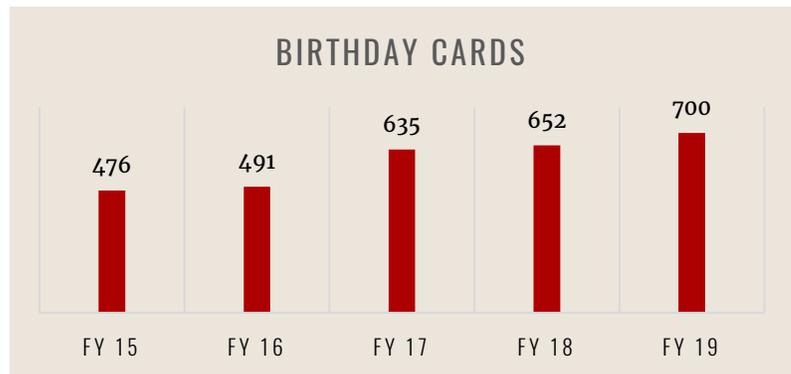


A produced Thanksgiving video was not delivered in FY19. Thanksgiving cards began in FY19. Donor Relations and Stewardship will begin recording Thanksgiving card stewardship in FY20.

BIRTHDAY CARDS

Scholarship Stewardship Coordinator

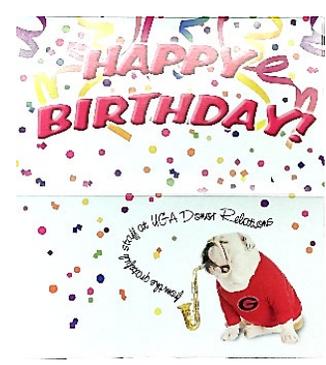
Birthday cards are sent to key donors, including: donors of \$500,000, Trustees, and top Campaign prospects. We also send cards to fundraisers and other key staff as a thank you, perhaps inspiring them to initiate similar personal touches for their donors. As with most of our acknowledgements and communications, 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

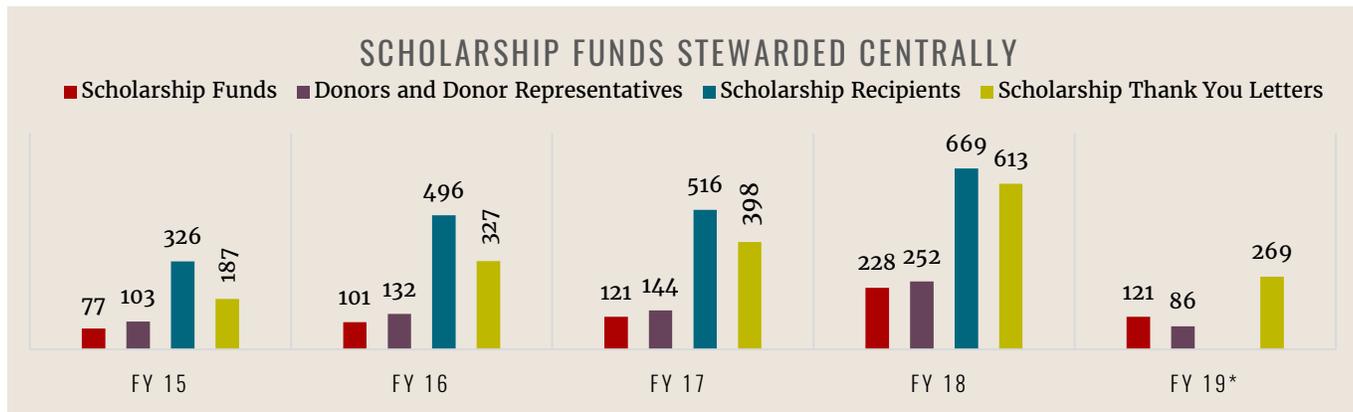
Stewarding gifts made to scholarship funds reinforces the University of Georgia's efforts to assure a donor that his or her investment is meaningful, appreciated, and being used as promised. Stewarding scholarships is a year-long process, running from the announcement of scholarships in early June through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

STUDENT PRIVACY COMPLIANCE

Assistant Director of Scholarship Stewardship

SCHOLARSHIP RECIPIENT PRIVACY

Due to a recent reinterpretation of the Federal Higher Education Act protecting the privacy of students, scholarship stewardship saw many changes over the course of FY19. Donor Relations works closely with the Office of Student Financial Aid (OSFA) to adhere to the appropriate processes while advocating for the need to report to donors. All donors still have the opportunity to hear from their recipients, but this cannot be guaranteed.



FY19 was the first year that need-based scholarships were unable to be contacted directly by our office due to privacy laws.

MERIT-BASED SCHOLARSHIPS

Assistant Director of Scholarship Stewardship
Scholarship Stewardship Coordinator

GRATITUDE REPORTS

Donor Relations and Stewardship manages the stewardship of all *non-departmental* scholarship funds (endowed and non-endowed) awarded through Admissions (such as Charter Scholarships), as well as some awarded through the Office of Instruction. Since these scholarships are not awarded by a unit, a unit-based Development Officer is not always assigned to the donors. Therefore, Donor Relations and Stewardship stewards these funds centrally.

Scholarship recipients of Admissions-based funds are contacted during the summer upon their award announcement to request a thank you message, short biography, and photo. These students receive a t-shirt if their questionnaire has been completed. The information collected is compiled into a standard format and sent to scholarship donors in their Gratitude Report in the Spring. Gratitude Reports are individualized and include thank you messages from the very students benefitting from the donors' generosity. Gratitude Reports reinforce our appreciation and show deeper impact, encouraging continued and increased giving. Due to this initiative, donors receive personalized recipient information while the students are receiving the donor's support.

Gratitude Report Stewardship began in FY14.

FY19 was the first year that non-departmental need-based scholarships were not included in this process.

GRATITUDE REPORTS FOR DEPARTMENTAL SCHOLARSHIPS

Donor Relations and Stewardship piloted Gratitude Reports for a department in FY19. Terry College of Business successfully stewarded their MBA scholarships with the process, and we look forward to including more schools and colleges for FY20. The responsibility of awarding these scholarships and reaching out to the students will remain with unit-based stewardship coordinators but including all merit-based scholarships in Gratitude Reports places units on a similar timeline. This will strengthen accountability and ensure that donors are receiving annual touches from the university. In addition, donors with multiple scholarships that impact several units will see a more holistic approach to their communication.



FY19 was the first year that a unit participated in Gratitude Reports. Donor Relations and Stewardship will begin recording this information in FY20.

NEED-BASED SCHOLARSHIPS

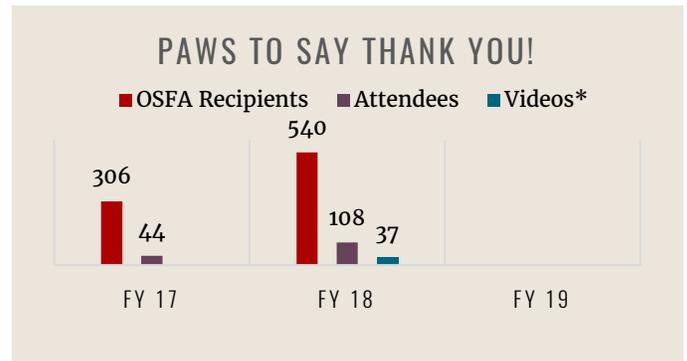
Assistant Director of Scholarship Stewardship
Scholarship Stewardship Coordinator

PAWS TO SAY THANK YOU

Like merit-based scholarships, Donor Relations and Stewardship manages the stewardship of *non-departmental* scholarship funds (endowed and non-endowed) awarded through Office of Student Financial Aid (such as Access Scholarships), as well as some awarded through the Office of Instruction. Since these scholarships are not awarded by a unit, a unit-based Development Officer is not always assigned to the donors. Therefore, Donor Relations and Stewardship stewards these funds centrally.

PAWS to Say Thank You was enacted in 2017 for our non-departmental need-based scholarship recipients to say an additional thanks to their scholarship donors beyond our standard Gratitude Report. After the reinterpretation of the federal Higher Education Act in FY19, this event has become the single way of engaging need-based scholarship recipients in the thank you note process. This collaborative event with the OSFA will begin occurring twice-per-year in FY20.

Privacy release forms allow the student to opt-in to receiving a request to participate in PAWS To Say Thank You. At the drop-in event, students write a hand-written letter to their donor representative(s). This ensures that student stories and privacy are maintained while allowing the donor to know the impact of their gift.



FY20 is the first year that PAWS to Say Thank You will take place twice in the academic year.

THANK VIEW VIDEO MESSAGES

Assistant Director of Scholarship Stewardship
Scholarship Stewardship Coordinator

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. Donor Relations and Stewardship will begin recording this information in FY20.

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.

This luncheon was revived in 2014 with the hire of a stewardship coordinator dedicated to scholarships. FY18 marked the 30th anniversary for the Woodruff Scholarship. See more about this impactful event in Reporting (on page 10).



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

GEORGIA COMMITMENT SCHOLARSHIP PROGRAM STEWARDSHIP

Presidential Acknowledgement Coordinator

Beginning in 2018, Georgia Commitment Scholarships (GCS) are stewarded by the **Office of Corporate and Foundation Relations**. However, Donor Relations writes a special acknowledgement letter signed by the Vice President for Development and Alumni Relations as these funds are established. GCS donors also receive a Presidential Acknowledgement prepared by our office, an annual Endowment Report, and a blanket stewardship email that is delivered to all scholarship donors each year.

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

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 leads 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 impact reporting. 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.

1. 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.



2. 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.

3. 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

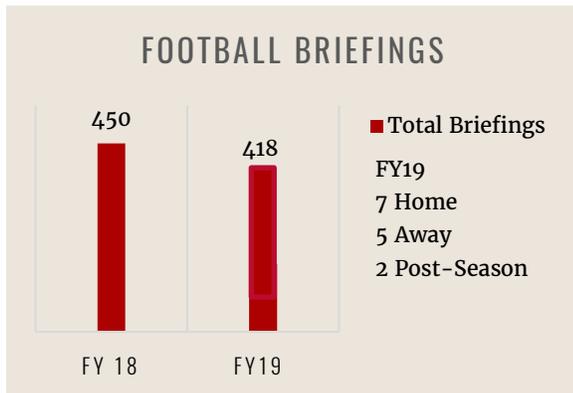
FY18 marked the first year for recording Presidential Donor Visit Planning data.

PRESIDENTIAL EVENT BRIEFINGS

Assistant Director of Presidential Stewardship

FOOTBALL SKYSUITE

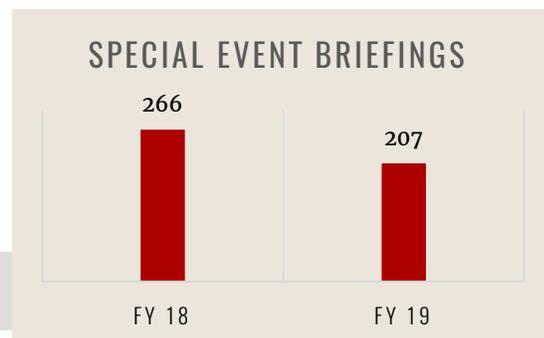
Football game days are a timeless way to interact with our donors among the excitement of college athletics. The Assistant Director begins working with the Vice President's Chief of Staff to coordinate SkySuite invitation lists in July to ensure all seats in the President's Suite are filled. With the 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.



*Football briefing numbers are per couple.

SPECIAL EVENTS

Like football game days, the Assistant Director works with Research and Prospect Management to create Presidential briefings for Development-related events. These events include: Annual Peabody Awards, regional dinners and events, and donor-hosted dinners.

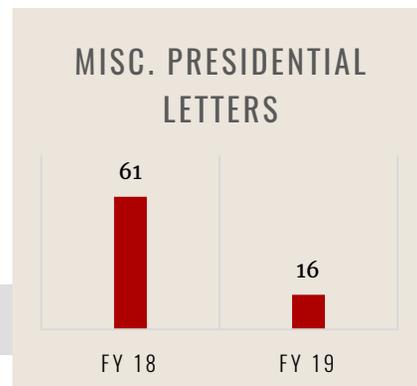


FY18 marked the first year for recording this data.

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. 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.

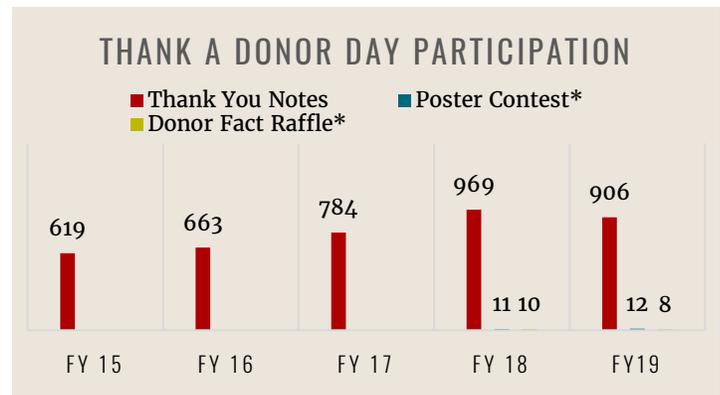
THANK A DONOR DAY

Assistant Director of Presidential Stewardship

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 occasion is also a perfect opportunity to collect student thank you notes, photos, video messages and other expressions of gratitude that can be used throughout the following year 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. Each year, our oversized card is used filled with student signatures, we nearly run out of t-shirts and cookies to give away to participants, and over 600 postcards are mailed to individual donors. We continue to utilize this event to collaborate with units campus wide and educate our students about the impact giving.



*The Group Poster Contest and Donor Fact Social Media Raffle began in 2017; recording began in FY18.



Thank a Donor Day began in FY12.

TEAM STEWARDSHIP

In 2015, Donor Relations and Stewardship began meaningful conversations that clarified UGA's unique, decentralized stewardship structure. This audit inspired new ideas in communication across our complex division of Development. Having identified "Stewies" in our 20+ units through a survey, Team Stewardship now meets quarterly to discuss best practices, highlight stewardship across campus, and create a communication pipeline essential to teamwork and collaboration across our campus community.



QUARTERLY MEETINGS

Assistant Director of Donor Reporting and Communications

Meetings create a stewardship community by bringing together those who are involved in donor relations efforts as a part of their daily work. Holistic stewardship of our donors occurs when stewardship by the central office and individual schools and programs is not an either/or proposition. When the central office does things well, units can devote their resources to specializing stewardship for their current and prospective donors. Team Stewardship meetings offer a leadership and support role while creating opportunities for everyone to learn from each other. We offer campus-wide updates and donor relations best practices, highlight successes within our units, and support this group through open discussion, creative ideas, and professional development.



"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

THE STEW

Donor Reporting 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 digital newsletter that provides an overview of the meeting and links to supplementing materials. With professional, yet uplifting, voice, *The Stew* highlights recent successes of our Stewies and elevates the work that takes place each meeting when shared with administration. In the future, *The Stew* from the previous meeting will be linked within the Save the Date for the next meeting.

View issues of *The Stew* and other Team Stewardship materials here:

www.issuu.com/teamstewardship

STEWARDSHIP SURVEYS

Assistant Director of Donor Reporting and Communications

To better understand university-wide stewardship and difficulties our units face, Donor Relations and Stewardship has administered two internal surveys and one donor survey. This research does not aim to highlight staff weaknesses or undermine a position—we aim to identify areas that need more support.

2019 DONOR EXPERIENCE AND LEGACY GIVING SURVEY

In June and July of 2019, Donor Relations and Stewardship partnered with Gift and Estate Planning to survey over 80,000 donors to track the reasons for giving, our alignment with donor expectations, and the potential for donors to give again. Survey results were reviewed by a graduate assistant from the Department of Psychology, and the reports will be released Fall 2019.

2017 SCHOLARSHIP STEWARDSHIP SURVEY

Over 20 units completed a checklist identifying funds that are systematically stewarded through a student thank you note. Units also received a questionnaire to more fully explain annual strategy for receiving thank you notes and coordinating scholarship events. The Survey results were released in November of 2017.

2016 COMPREHENSIVE STEWARDSHIP SURVEY

The Comprehensive Stewardship Survey was materialized in October 2015. For three-months, the Senior Director and Assistant Director met with 23 of the University’s units in their places of work. Collecting this overview of stewardship activities gave University Development an ability to better support our units. Through greater communication, this survey inspired ideas, encouraged collaboration, and provided a baseline for the future of donor relations. Since its release in the Spring of 2016, this survey has fostered a more cohesive campus stewardship community.

COMPILATION OF RESPONSES

With 20 participating units sharing their stewardship practices through a questionnaire and checklist of scholarship funds, we found that Team Stewardship members invest a lot of time and effort into stewarding scholarships. Development staff collaborates with Deans and Department Heads, Business Offices, and Faculty Committees to encourage student involvement and deliver thank you notes each year, with Spring being the most popular time to award scholarships and steward their donors through special events.

SCHOLARSHIP STEWARDSHIP MANAGEMENT

Team Stewardship members play the heaviest role in stewarding scholarships campus-wide, encompassing 64% of the work, and several Directors of Development handle both fundraising and reporting of scholarships. Overall, 88% of stewardship is managed by a development staff person.

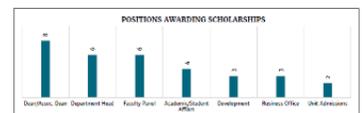
Placing the sole of stewarding scholarships with development makes sense for units, and several development coordinators that do not manage scholarship reporting wish they played a larger role.

In contrast, the many one-person shops wish they had an extra hand to help with this process, as 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 appointed Faculty (13 units explicitly listed a committee). Other positions that play a critical role in awarding scholarships include those in Academic Affairs, Business Offices, and Admissions. Three 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.



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 on a weekly and monthly schedule.
- ✓ Debrief from special events or projects within one-week following the project.
- ✓ Utilize Team Stewardship to generate collaborative efforts and better understand school, college, and unit needs.
- ✓ Develop teamwork and professional skills through courses, webinars, and other continuing education.
- ✓ Improve processes for acknowledging and reporting gift impact.
- ✓ Recognize and engage donors fairly.
- ✓ Increase student and faculty gratitude participation.
- ✓ Collaborate with units and development officers on special projects.
- ✓ Enhance holistic donor stewardship and the top donor experience.

FY20 GOALS

| OVERALL GOALS | |
|--|------|
| Finalize Campaign closing stewardship plan | 2020 |
| Redistribute retired Assistant Director's tasks | 2020 |
| Reclaim individual work time | 2020 |
| Better project management processes and cross-training | 2020 |
| Implement PAW Society | 2020 |
| Give more responsibility to student workers | 2020 |
| Explore naming opportunities software | 2020 |
| Explore and implement Team Stewardship service project | 2020 |
| PRESIDENTIAL STEWARDSHIP | |
| Plan and implement Campaign closing message for 2020 Thank a Donor Day | 2020 |
| Include satellite campuses in Thank a Donor Day | 2020 |
| Plan Campaign closing event | 2020 |
| REPORTING AND COMMUNICATIONS | |
| Receive donor survey data and share with Division | 2020 |
| Implement trustee stewardship | 2020 |
| Train and implement new Reporting Coordinator | 2020 |
| Explore faculty investiture and/or donor recognition | 2020 |
| Collaborate with Financial Services to explore endowment FAQ pamphlet | 2020 |
| Explore online stewardship matrix with DARCOMM | 2020 |
| SCHOLARSHIP STEWARDSHIP | |
| Collaborate with OVPI to implement Campus Logic stewardship module | 2020 |
| Implement PAWS to Say Thank You as a fall and spring activity | 2020 |
| Create guidelines and shared calendar for ThankView users | 2020 |
| Develop and implement milestone and special stewardship | 2020 |
| Collaborate with at least three units on Gratitude Reporting | 2020 |
| Redesign and implement new tribute notification format | 2020 |
| FUTURE GOALS | |
| Implement Campaign closing celebration | 2021 |
| Implement post-Campaign stewardship | 2021 |
| Plan and implement 10 th Anniversary of Thank a Donor Day | 2021 |
| Update the campus-wide stewardship survey | 2021 |
| Propose eliminating Honor Roll of Donors | 2021 |
| Implement faculty investiture and/or donor recognition | 2021 |
| Begin stewardship for silent phase of next campaign | 2022 |

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 and drives the collective mission of acknowledging, recognizing, stewarding, and engaging University-wide giving at the University of Georgia.

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, and Regional Donor Events). 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 presidential coordinators 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 thank-you notes and individual stewardship. The Assistant Director of Scholarship Stewardship manages the Scholarship Stewardship Coordinator to plan and implement scholarship gratitude including: Gratitude Reports, PAWS to Say Thank You, and ThankView messaging. Additionally, this role oversees the acknowledgement procedures managed by the Scholarship Stewardship Coordinator, including: milestone and special stewardship videos and calls, memorial and honorary gift notification, first-time donor, second-time donor, loyalty, PAW Society, and Georgia tag acknowledgements. Student workers report to this position.

ASSISTANT DIRECTOR OF DONOR REPORTING & COMMUNICATIONS

Melissa Lee

The Assistant Director of Donor Reporting and Communications is essential to Donor Relations and Stewardship by managing and implementing strategic stewardship reports, overseeing the production of communications developed within the office, and crafting various proposals and presentations that support the Office's mission. This position is responsible for producing University-wide Comprehensive Donor Impact Reports and managing the execution of Endowed Faculty Impact Reports, Annual Trustee Impact Reports, and the Presidents Club Newsletter. The Assistant Director also assists in annual Financial Endowment Reporting and serves as the liaison for the Development Communications office. Additionally, this position is responsible for coordinating quarterly Team Stewardship meetings, writing for the Team Stewardship newsletter, *The Stew*, and overseeing the projects of the Donor Reporting Coordinator.

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 personalized process of Presidential gift acknowledgements, annual recognition, and event assistance. This position works collaboratively with the Presidential Stewardship Coordinator, Development Directors, and Fundraisers and is responsible for creating highly personalized, accurate Presidential acknowledgements for major gifts and pledges, managing Presidents Club welcome packet and decal mailings, and compiling the Honor Roll of Donors for the Annual Report to Donors. The Presidential Stewardship Coordinator also supervises Presidents Club Reception ambassadors, assists in event management, and supports the production of miscellaneous Presidential letters.

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 this role's priority is to support scholarship stewardship by assisting in annual Gratitude Reports, PAWS to Say Thank You, and ThankView messaging, the Scholarship Stewardship Coordinator devotes a weekly-work flow to other important stewardship projects. This position is responsible for coordinating birthday cards, memorial and honorary gift notifications, milestone stewardship, and first-time, second-time, loyalty, PAW Society, 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.

PRESIDENTIAL STEWARDSHIP COORDINATOR

Shearron Hamlin

Reporting to the Assistant Director of Presidential Stewardship, the Presidential Stewardship Coordinator is essential to Donor Relations and Stewardship by supporting the personalized process of Presidential gift acknowledgements and annual recognition. This position works collaboratively with the Presidential Stewardship Coordinator, Development Directors, and Fundraisers and is responsible for creating highly personalized, accurate Presidential acknowledgements for major gifts and pledges, preparing Vice Presidential acknowledgements for Georgia Commitment Scholarships, and assisting in generating Presidents Club welcome packets, decals, and the Honor Roll of Donors. The Presidential Acknowledgement Coordinator also provides event support and coordinates the invoicing and accounts payable process with the assistance of our shared support roles.

DONOR REPORTING COORDINATOR

Teale Moran

Reporting to the Assistant Director of Donor Reporting and Communications, the Donor Reporting Coordinator is essential to Donor Relations and Stewardship by producing Endowed Faculty Impact Reports, the Presidents Club Newsletter, and Annual Trustee Impact Reports. This position assists the Assistant Director in the production of Individual Impact Reporting and the Project Manager in the production of Financial Endowment Reports. The Donor Reporting Coordinator also coordinates video and email stewardship messaging for first time donors and the PAW Society while assisting with the proofing process for all communications. Additionally, this position assists in creating internal and external presentations and proposals, maintains the Stewardship Overview, and develops the quarterly Team Stewardship Newsletter, *The Stew*.

PROJECT MANAGER

Teresa Kesler

The Project Manager is a part-time, essential role in Donor Relations and Stewardship by managing the production of Financial Endowment Reports and assisting with budget and project management. This position also serves as GAIL data analyst by fulfilling data requests, developing and running queries, and collaborating with IT to ensure that all data needs are met. The Project Manager brings a wealth of institutional knowledge to the team and cross trains Assistant Directors and Coordinators in several tasks, including reporting, budgeting, data, giving society management, and difficult donor situations.

SHARED SUPPORT

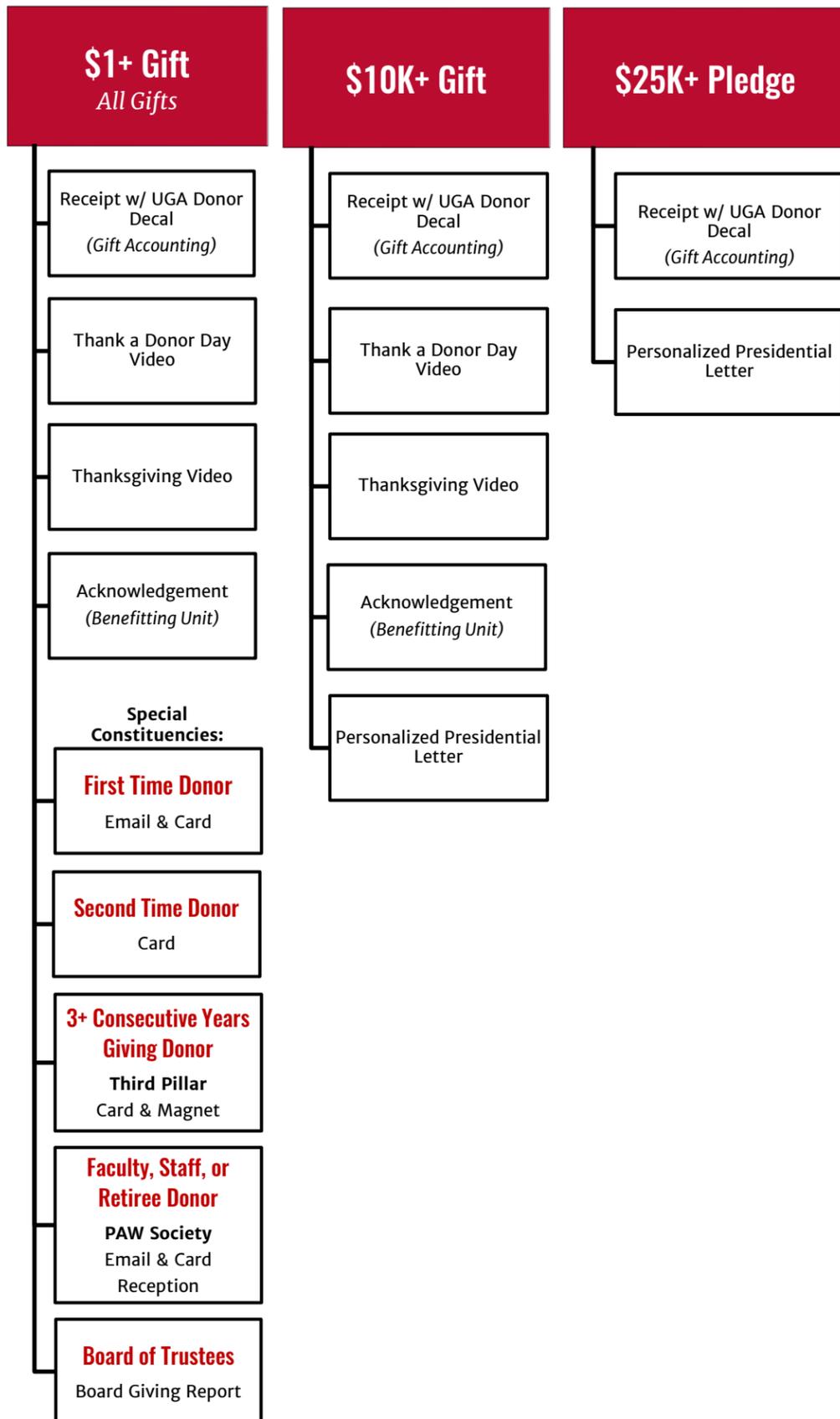
Caitlin Lacey and Tonya Moore

Our shared support roles directly report to other offices but are essential to our work by assisting with donor events, presidential briefings, and accounts payable processes.

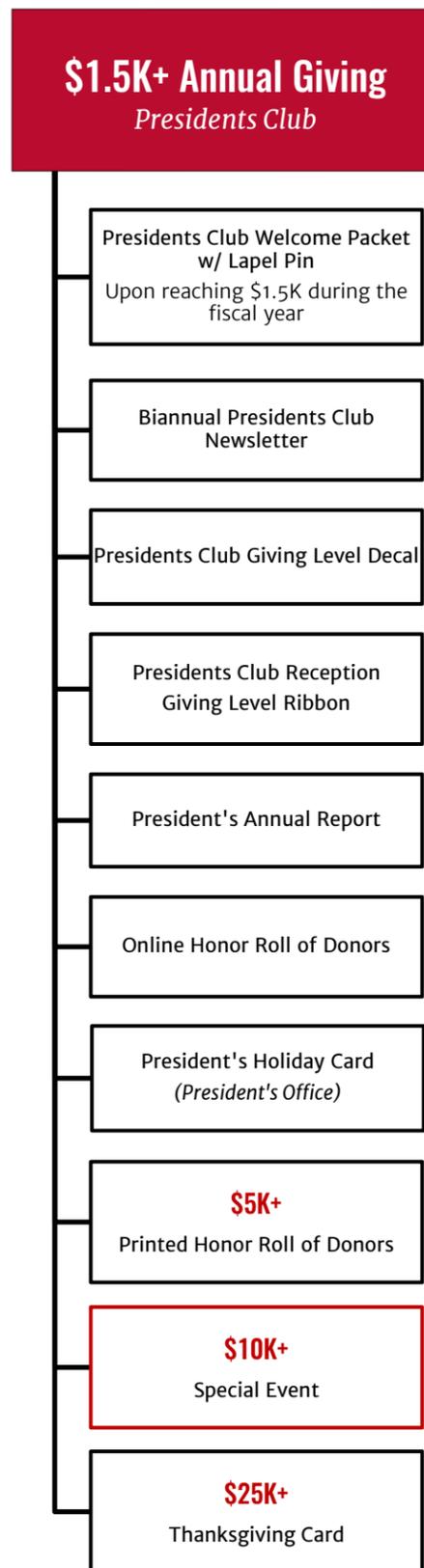
| JULY | AUGUST | SEPTEMBER | OCTOBER | NOVEMBER | DECEMBER | JANUARY | FEBRUARY | MARCH | APRIL | MAY | JUNE | | | | | | |
|---|--------|---|---------|---|----------|--|----------|---|-------|-------------------------------------|------|--|--|----------|--|--|--|
| < Presidential Gift Acknowledgements + Miscellaneous Presidential Letters (weekly) > | | | | | | | | | | | | | | | | | |
| FY20 Presidents Club Welcome Packets (monthly) | | | | | | | | | | | | | | | | | |
| < Georgia Commitment Scholarship VP Acknowledgements (weekly) > | | | | | | | | | | | | | | | | | |
| < CGS Welcome Packets and Recognition Preferences (monthly) > | | | | | | | | | | | | | | | | | |
| FY20 First Time Donor + Second Time Donor + Tag + PAW Society Mailed Acknowledgements (monthly) | | | | | | | | | | | | | | | | | |
| FY20 First Time Donor + PAW Society Email Acknowledgements (weekly) | | | | | | | | | | | | | | | | | |
| FY20 Third Pillar Magnet Mailing (monthly) | | | | | | | | | | | | | | | | | |
| < Tribute Acknowledgements (weekly) > | | | | | | | | | | | | | | | | | |
| FY20 Birthday Cards (daily) | | | | | | | | | | | | | | | | | |
| < Milestone + Special Stewardship (developing process) > | | | | | | | | | | | | | | | | | |
| < FY19 Donor Event Preparation | | | | Thank a Donor Day Preparation | | | | | | | | | | | | | |
| PAW Society Reception August 23, 2019 | | Presidents Club Reception October 11, 2019 | | | | | | | | Thank a Donor Day April 16, 2020 | | | | | | | |
| Presidents Club Decal | | | | | | | | | | | | | | | | | |
| Honor Roll of Donors | | | | | | | | | | | | | | | | | |
| Football Sky Suite Briefings (weekly) | | | | | | Regional Donor Events + Peabody Award Briefings | | | | | | | | | | | |
| < Presidential Visit Briefings (as needed) > | | | | | | | | | | | | | | | | | |
| | | | | Thanksgiving Stewardship Video Email + Pop-up Card Mailing | | | | | | | | Thank a Donor Day Stewardship Video Email + Postcard Mailing | | | | | |
| FY20 Gratitude Report (Admissions + Units) Award Verification + Questionnaire | | | | | | FY20 Gratitude Report Report Production | | | | | | | | | | | |
| PAWS to Say Thank You (Need-based) Fall Semester 2019 | | | | | | | | PAWS to Say Thank You (Need-based) Spring Semester 2020 | | | | | | | | | |
| < Need-Based Scholarship Student Privacy Forms > | | | | | | | | | | | | | | | | | |
| < SCUD ThankView Oversight > | | | | | | | | | | | | | | | | | |
| | | | | | | | | Woodruff Scholarship Luncheon | | | | Woods Scholarship Ceremony | | | | | |
| < Individual Scholarship Stewardship (as needed) > | | | | | | | | | | | | | | | | | |
| FY19 Endowed Faculty Impact Report Report Production | | | | | | | | FY20 Endowed Faculty Impact Report Fund Verification + Questionnaire | | | | | | | | | |
| < FY19 Trustee Impact Report Data Collection + Report Production | | | | | | | | | | | | FY20 Trustee Impact Report > Prepare for FY20 Report | | | | | |
| < Individual Impact Book Determined | | | | Individual Impact Book TBD | | | | | | Individual Impact Book > TBD | | | | | | | |
| | | | | Presidents Club Newsletter | | | | | | | | Presidents Club Newsletter | | | | | |
| FY19 Financial Endowment Report Report Production | | | | | | | | | | | | FY20 Financial Endowment Report Collect Unit Personalized Information | | | | | |
| Team Stewardship | | | | Team Stewardship | | | | Team Stewardship | | | | Team Stewardship | | | | | |
| | | The Stew | | | | The Stew | | | | The Stew | | | | The Stew | | | |
| FY20 Stewardship Overview Refresh | | | | | | Overview Refresh | | | | | | Overview Refresh | | | | | |
| < External Professional Development Presentations | | | | | | External Professional Development Presentations > | | | | | | | | | | | |
| < Internal Presentations & Proposal Writing (as needed) > | | | | | | | | | | | | | | | | | |
| | | | | | | FY21 Communications Planning, Design, and Proofing | | | | | | | | | | | |
| | | | | | | FY21 Budget Planning | | | | | | FY20 Evaluations & FY21 Goal Setting | | | | | |
| < Collaborate with Departments & Units (as needed) > | | | | | | | | | | | | | | | | | |
| | | | | | | | | Proposed Top Tier Presidents Club Event | | | | | | | | | |

| | | |
|---------------------------|------------------------------|------------------|
| Stewardship Communication | Scholarship Stewardship | Signature Event |
| Presidential Stewardship | Financial & Impact Reporting | Collaboration |
| Strategic Planning | Communication Planning | Team Stewardship |

GIFT ACKNOWLEDGEMENT



ANNUAL STEWARDSHIP



RECURRING STEWARDSHIP

