



UNIVERSITY OF  
**GEORGIA**

FISCAL YEAR  
**2021**

# DONOR RELATIONS & STEWARDSHIP



## **STEWARDSHIP OVERVIEW**

*Annual Calendar & Matrix*

**JULY 2020**



UGA Livestock Arena, 2020

# welcome!

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

Our *Stewardship Overview and Matrix* encapsulates our efforts, achievements, and goals as a unit of UGA Development and Alumni Relations. I am pleased to share our team's outstanding metrics as of June 30, 2020 given many obstacles we have faced. This issue exemplifies our development over five-years, present plans, and future goals for FY21 and beyond.

The successes of our team are direct results from the dedication and passion that each of us, as individuals, embody. This year, we were presented with obstacles that we have never experienced in the past. Since March 2020, we have grown closer as a team, division, and university. Our creative juices went to work as we saw great change—change in our team and change in our world. Several projects have been eliminated, transformed, or reduced.

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  
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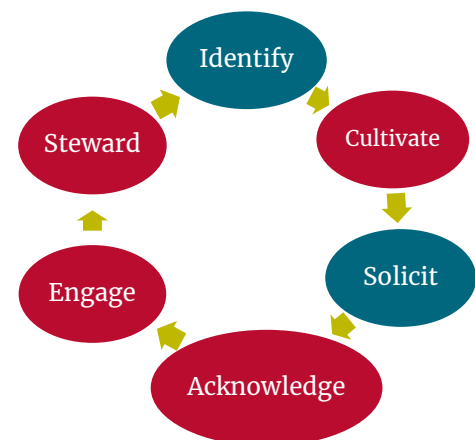
# INTRODUCTION

## MISSION & VISION

Donor Relations and Stewardship sustains and nurtures lifelong relationships with University of Georgia donors on a university-wide level 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 took the immediacy and excitement that comes with this type of strategic direction to reorganize, implement new programs, and update existing stewardship. This campaign changed the lives of thousands of students, funded world-changing research, expanded the university's land-and-sea-grant missions, and continued 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.

# 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.

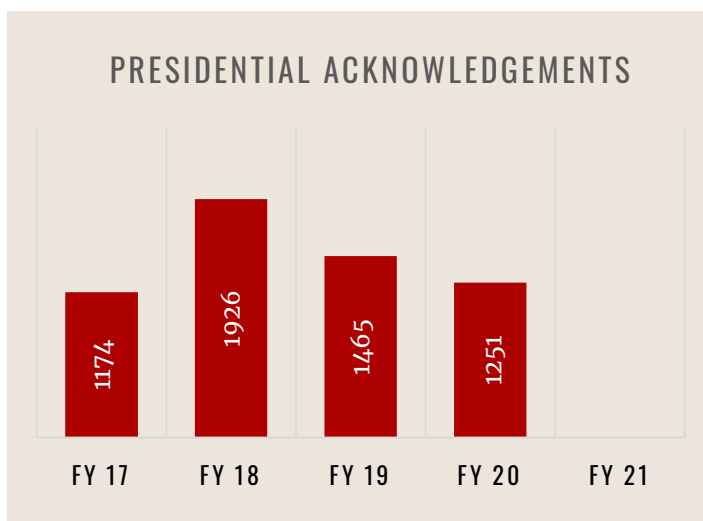
## PRESIDENTIAL GIFT ACKNOWLEDGEMENT

### Presidential Stewardship Coordinators

Gifts of \$25,000 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 inform donors that their financial support is gratefully received, vital to our school and community, and being used according to their stated wishes and expectations.

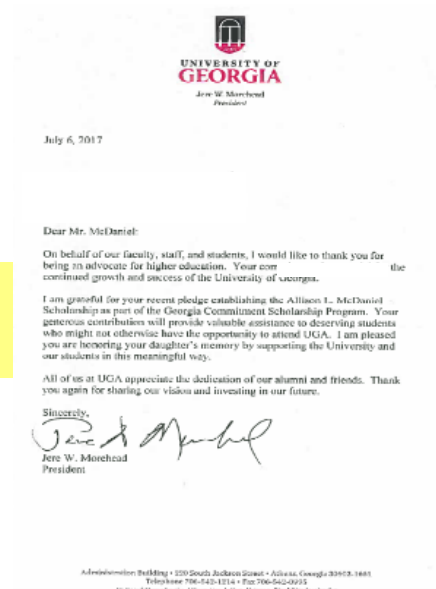
Along with gifts of \$25,000 and above, presidential letters are also generated for all newly established pledges beginning at \$25,000; these donors are acknowledged again when their pledge is fulfilled. We also edit presidential letters written by Gift and Estate Planning welcoming donors into the Heritage Society. Special circumstances as indicated by the President's Office are also acknowledged.

### WEEKLY MAILING



The presidential acknowledgement threshold increased from gifts of \$10,000 to gifts of \$25,000 in August 2020.

For historical data regarding this and other projects, please contact the Donor Reporting Coordinator for previous Stewardship Overviews.



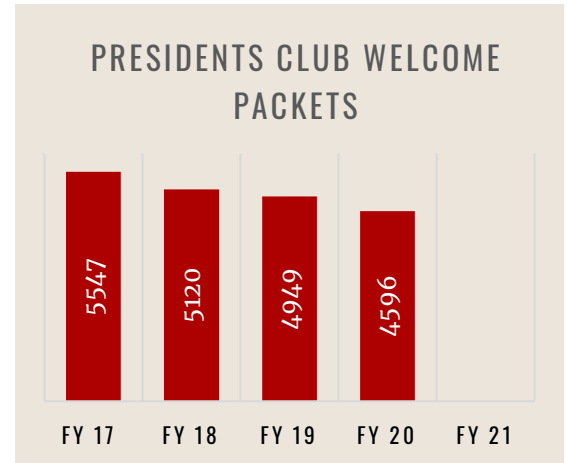


# PRESIDENTS CLUB WELCOME ACKNOWLEDGEMENT

## 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. 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 began in 2014.  
The threshold for Presidents Club was raised from \$1,000 to \$1,500 in FY18.

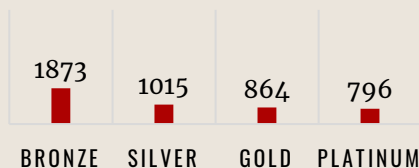
# PRESIDENTS CLUB YEAR-END DECAL ACKNOWLEDGEMENT

## Presidential Stewardship Coordinators

In 2018, we reevaluated our past giving levels and developed a new program. Presidents Club members receive the Welcome Packet upon reaching \$1,500, but many donors reach a higher giving level through multiple gifts over the course of the fiscal year. To recognize this generosity, we mail an annual decal in August that reflects the donor's total giving during the previous fiscal year.

ANNUALLY IN AUGUST

### 2020 PRESIDENTS CLUB DECALS



Presidents Club Decal stewardship began in FY18.



### PRESIDENTS CLUB LEVELS



We hope you will display this decal with pride and that it will serve as a reminder of our gratitude.

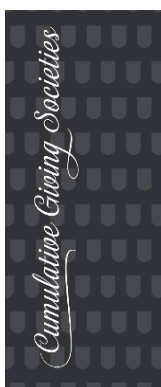
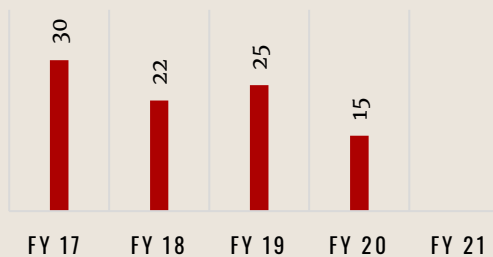
# CUMULATIVE GIVING SOCIETIES ACKNOWLEDGEMENT

## Associate Director of Donor Relations and Stewardship

We have been exploring ways to elevate Cumulative Giving Societies stewardship and decided that redesigning the CGS Welcome Packet would be an important step. Beginning in FY21, once a donor's qualifying gifts total \$1M+, we will mail them an upgraded packet containing a letter from President Morehead, information regarding the societies and the recognition received, as well as a verification form confirming their desired name format. This form also allows them to choose if they would like to be anonymous, or they can decline membership all together.

MONTHLY MAILING

### CGS NEW MEMBERS



### THE SOCIETIES

### CAMPUS RECOGNITION

Welcome

### VERIFICATION

The University of Georgia is pleased to recognize you as a Cumulative Giving Societies member. To properly recognize you in the President's Garden and the President's Annual Report, please choose your recognition preference from the options below.

Your recognition as it will appear:

Mr. and Mrs. Jordan Dotson

☐ I am pleased with the above naming recognition, and the University has my permission to recognize me as a Cumulative Giving Societies member.

☐ I prefer an alternative naming recognition, and the University has my permission to recognize me as a Cumulative Giving Societies member.

Please print your preferred naming recognition on the line below.

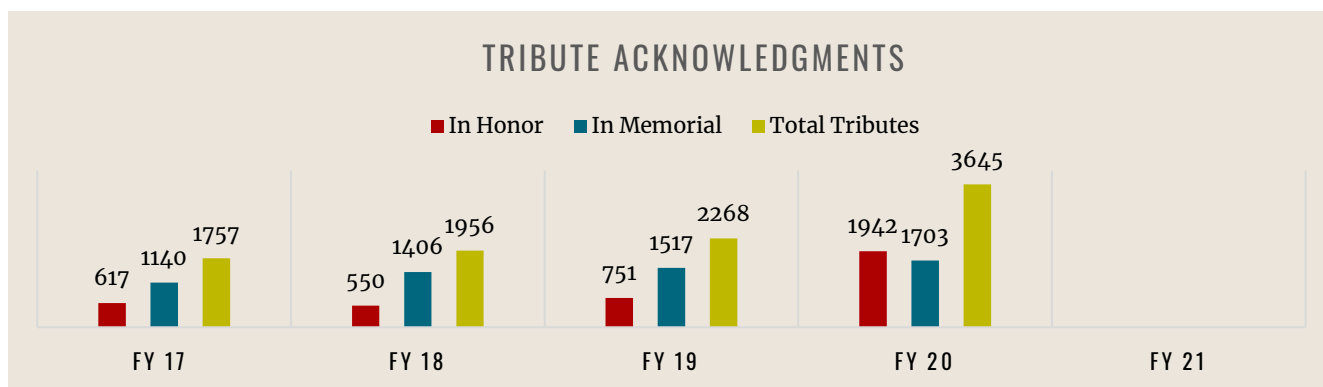
SEE REVERSE

# MEMORIAL & HONORARY GIFT NOTIFICATION

**Presidential Stewardship Coordinators**

**WEEKLY MAILING**

All memorial and honorary gifts receive special acknowledgement by Donor Relations and Stewardship. Special cards 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.

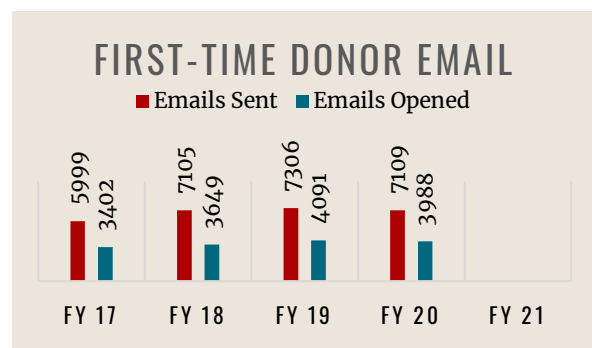
# FIRST-TIME GIFT ACKNOWLEDGEMENT



**Assistant Director of Donor Reporting and Communications**

**WEEKLY EMAIL**

First-time donors receive a specialized message through 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.



**Thank you for your first-ever gift to UGA!**

**You are making a difference.**

First-time donor stewardship began in FY14.

The first-time donor mailed acknowledgement was eliminated for FY21 due to COVID-19 related budget reductions.





## SECOND-TIME GIFT ACKNOWLEDGEMENT

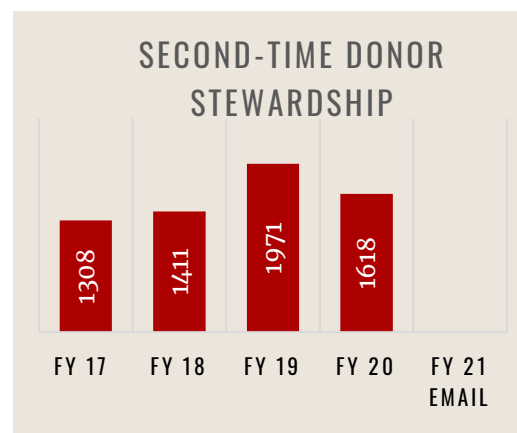
### Assistant Director of Donor Relations and Stewardship

Second-time donors receive a specialized message through e-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.



A DOUBLE-DAWG THANK YOU!

### WEEKLY EMAIL



Second-time gift stewardship efforts began in 2015.

The second-time donor acknowledgement is digital for FY21 due to COVID-19 related budget reductions.

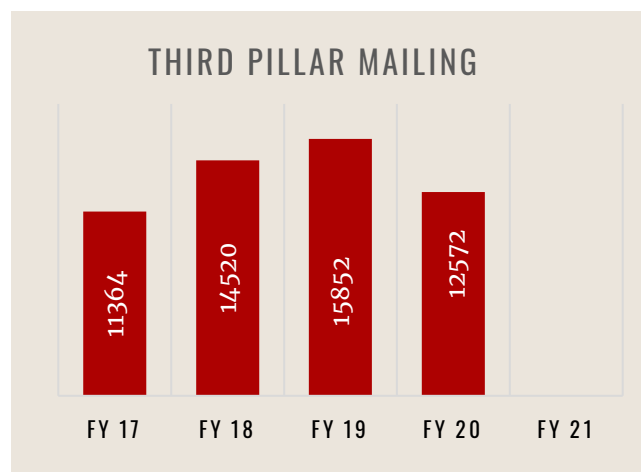
## THIRD PILLAR LOYALTY DONOR ACKNOWLEDGEMENT

### Assistant Director of Donor Reporting and Communications

The Third Pillar is a loyalty recognition program for donors making gifts in the last three or more consecutive years. 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



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

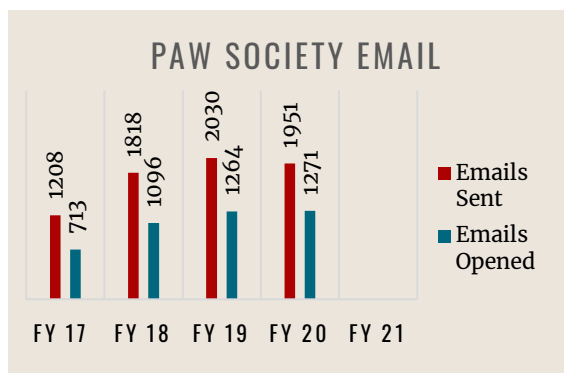
## PAW SOCIETY WELCOME ACKNOWLEDGEMENTS



Assistant Director of Donor Reporting and Communications

WEEKLY EMAIL

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. The email includes a special video message from Hairy Dawg.



Faculty and staff stewardship began in 2014 with an email and event.  
PAW Society branding began in FY20 with an additional mailing through Campus Mail

The PAW Society mailed acknowledgement was eliminated for FY21 due to COVID-19 related budget reductions.

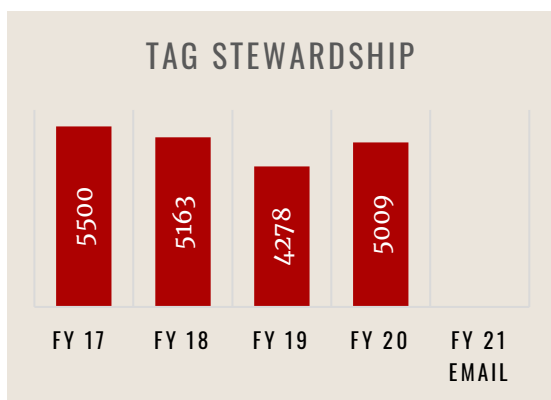
## GEORGIA VEHICLE TAG ACKNOWLEDGEMENT



Assistant Director of Donor Reporting and Communications

WEEKLY EMAIL

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



Tag acknowledgement stewardship efforts began in 2016.

The special tag acknowledgement is digital for FY21 due to COVID-19 related budget reductions.

# REPORTING

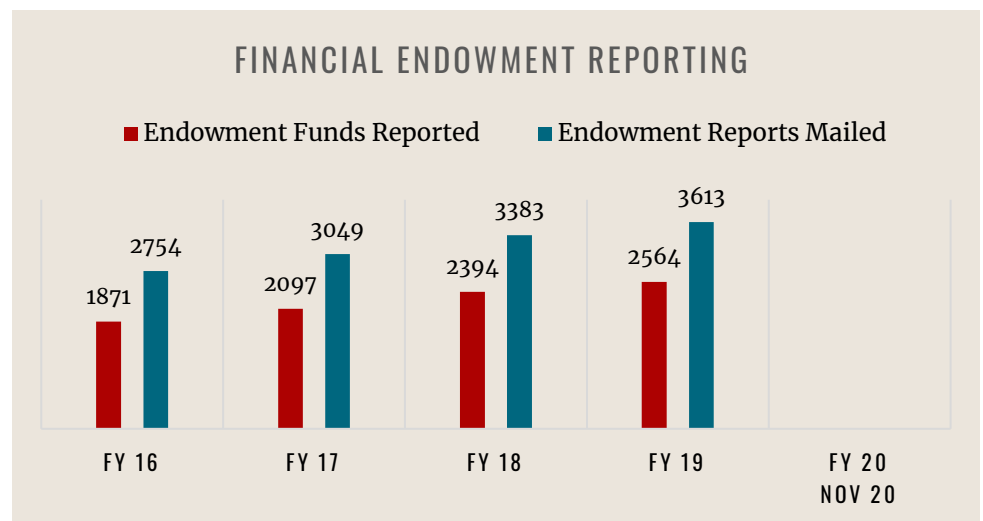
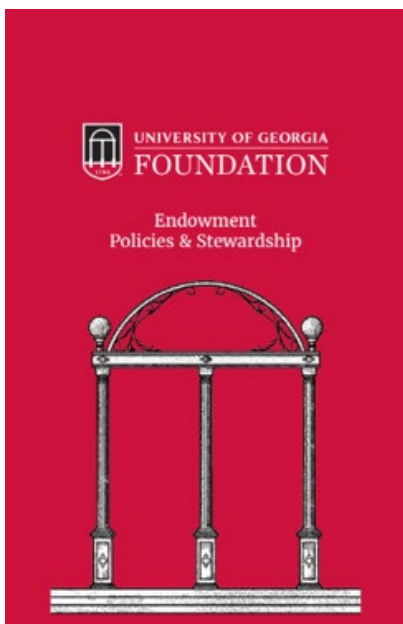
Reporting on the financial status of endowed funds and impact of leadership giving is essential in order to ensure each donor that his or her gift has been invested wisely and its full value is being distributed appropriately to the University community. Donor Relations and Stewardship has been managing 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 illustrate the impact of gifts beyond endowment performance.

## FINANCIAL ENDOWMENT REPORTING

### Donor Reporting Coordinator

ANNUALLY IN NOVEMBER

Each November, Donor Relations and Stewardship generates Financial Endowment Reports for all endowed funds. These personalized reports reflect the previous fiscal year's status and endowment growth of each fund and are distributed to donors and donor representatives. Donor Relations and Stewardship works closely with UGA Foundation and Financial Services to ensure accurate and timely reporting, and the Donor Reporting Coordinator adds stewardship contacts as new funds are established. Donor Relations collaborates with each department for unique messages and contact information to create a more exclusive report. The report was redesigned in 2019 to allow for less duplication of information. In 2020, a pamphlet was added to expand investment, spending, and stewardship information.



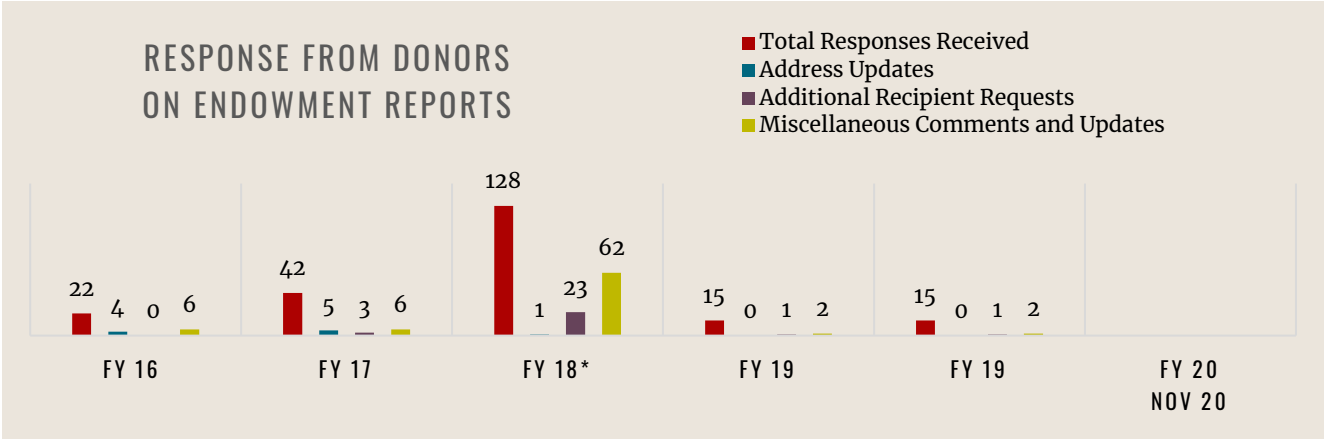
Endowment Reports reflecting FY20 will be mailed November 2020.

Annual Endowment Report stewardship began in 2005.



# ENDOWMENT REPORT RESPONSE FROM DONORS

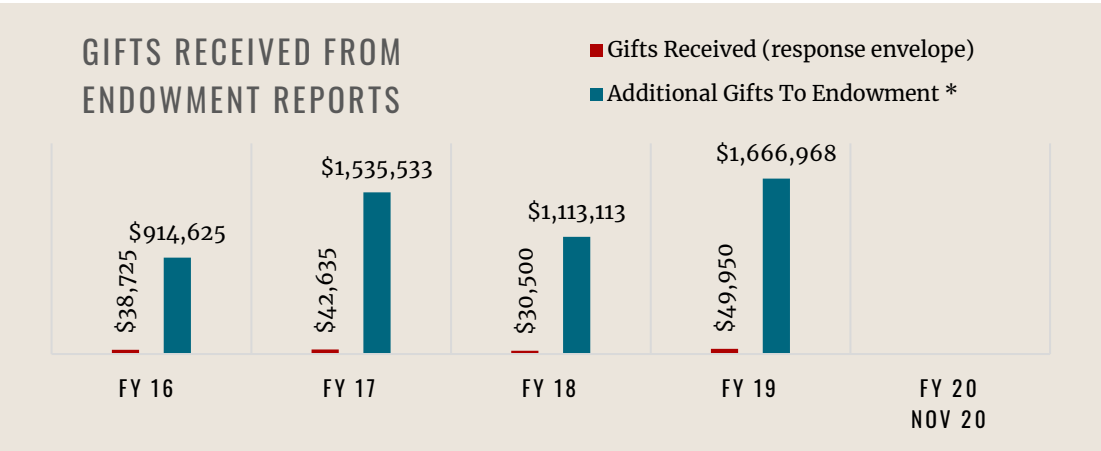
The first endowment reports were sent in 2005 to 374 individuals and corporations. In FY19, 3,613 reports were mailed. This well received project has grown dramatically in size since then due to newly created funds being stewarded as well as established funds being researched for recipients of the information. 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 Donor Reporting Coordinator for details.

“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



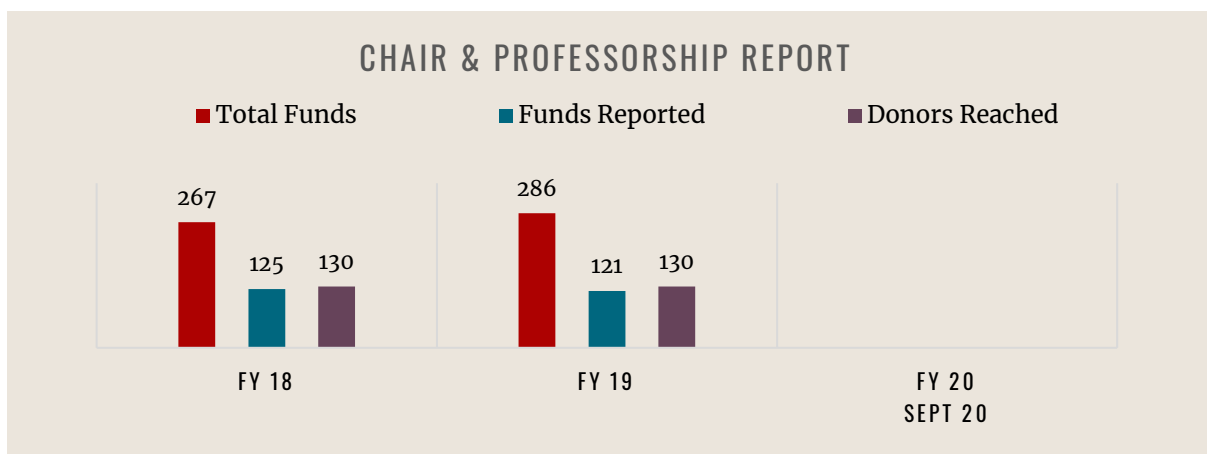
\*“Gifts Received” identifies checks mailed in response to the Endowment Report, and “Additional Gifts to Endowment” identifies all gifts given to stewarded endowed funds.

# ENDOWED FACULTY IMPACT REPORTING

## Donor 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

Cabrorerori dem. Qui cum ventis autem facesequi dignimetur aut eos et militaquamus et inctio illoquod ma velenis consedis entem quatum quiam si omnist lis dolore vellamet reped molor alibus dolupat.

Picimpores ellorem quas volore, cum incem aborem am, sit, estionsed ex eum cus qui re liquos voluptat laccab id est ea volecte sa nim harumquas eos dolorpo repudamus, qui temodis iur.

Raturibus, consernam, a volor moluptatet ute pro vendae pe conector ratis eum invendem imus prae et vendebis ium rem net am idunt, eosaepe ribusanimus doloria et por rest hicil id ut laut il int.sus volorro dolo es auteseque mos

Endowed Faculty Reports reflecting FY20 will be mailed Fall 2020.

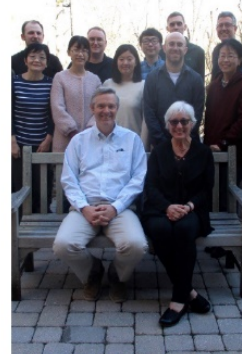
THANK YOU FOR SUPPORTING THE UNIVERSITY OF GEORGIA THROUGH ENDOWED CHAIRS AND PROFESSORSHIPS.

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  
Vice President for Development and Alumni Relations



Caption copy here lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi quis ante ante. Vestibulum auctor magna quis lacus malesuada. Ut feugiat lectus et aliquam efficitur. Suspendisse quis urna id sem sodales suscipit. Aenean luctus consectetur nisi, non ornare sem. Nunc auctor lorem id urna eleifend.

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



Endowed Faculty Impact Report

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





# INDIVIDUAL DONOR IMPACT

## Assistant Director of Donor Reporting and Communications

ONE/TWO PER YEAR AS NEEDED

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

The most recent Individual Impact Report was presented to the Parker family in September 2020. In collaboration with Principal Giving, the book included thank you notes from over 25 messages from administration, faculty, scholarship recipients, and friends who are a part of the family's UGA legacy. These hardback books include family photos and photos of campus over the years. They are reserved for donors with cumulative giving reaching \$1 million or more.



*Woodruff Scholars*  
ACROSS THE COUNTRY

The Woodruff Scholarship gives us the opportunity to be involved in many extraordinary activities such as volunteering with the Oglethorpe Foundation at an orphanage. The following are years above others. I was able to travel during school. Instead, I could have been in my academic and college experience. Because of this, I am grateful for the opportunity to be involved in this with a difference in physical therapy. I am fortunate to have a job offer on the side, and I plan to accept a position to work with patients in the Florida Georgia area. I continue to work hard and prepare. I've worked from on back and will work hard to grow on a new home with my husband. Home, values and respect. I would be glad to see you. You have been a helpful, kind, strong, and caring person. You have made a great impact in the lives of so many students through your generosity.

*Alanna Gifford*  
PHYSICIAN  
DOCTOR OF PHYSICAL THERAPY, CHATTANOOGA, GEORGIA, & FORT LINDSEY, MISSOURI

More than 45 Scholars remain in Georgia, positively impacting our immediate community.

*A Legacy of Promise*

Many would say my connection with the Board of Trustees of the University of Georgia Foundation. Her greatest love was the Fellowship Foundation Scholarship Committee. She spent countless hours in meetings and discussions helping select those students who would be granted Scholarships. As the fund built up over the years, this required more and more time commencing with students in decreasing order of need. She was also very generous with her donations. When it came time to find a legacy statue of my wife, Bernard R. Ramsey, she called me and offered to jointly fund the cost with me for the statue. This was so very generous her part and completed just how much she was willing to do for the Foundation and the University of Georgia.

*Bernard Ramsey*  
CHARTERED FINANCIAL

*Bernard Ramsey Statue*  
EST. 2004

I've known Minnie for as long as I have been with the University. Her love for this institution is expressed by her dedication—a dedication that ensures her family's legacy will continue to change the lives of students for years to come. Minnie has done it all as a supporter of UGA, and she has done it well.

*Greg Daniels*  
DEVELOPER & ALUMNI RELATIONS

*George Woodruff*  
A LIFE OF QUIET ACHIEVEMENT

ALLWOODRUFF WOODRUFF WAS BORN AND RAISED IN AN ENVIRONMENT OF GEAR, HATFIELD, HE WAS KNOWN THROUGHOUT HIS LIFE AS A MAN OF SIMPLE BELIEFS AND VALUES, FAMILY AND FRIENDS, VALUES THAT AMPLIFIED, THEIR OWN HAPPINESS IN HIS LIFE. HE WAS REVERENCED FOR HIS GIFT OF TRANSPARENT GIVING TO MANY EDUCATIONAL, MEDICAL, AND OUTREACH CAREERS, AND ENVIRONMENTAL ACHIEVEMENTS FOR HIS BUILT IN VARIOUS RESEARCHERS UNTIL HIS VERY ADVANCED YEARS.

*Charles B. Knapp*  
UNIVERSITY PRESIDENT EMERITUS

When I became President in 1987, scholarship funds for outstanding students were substantially limited. The Woodruff Scholarship Program became one of the first to be utilized to begin to attract the best and brightest students to the University of Georgia. Without the Woodruff Scholarship and other programs such as the More Scholarships funded by the University of Georgia Foundation and later the HOPE Scholarships, the University might never have been able to establish the course which would eventually result in Georgia becoming one of the most highly regarded public universities in the country.

*Woodruff funds provide scholarships at UGA*

A scholarship program that has been a part of the University of Georgia since its founding in 1785. The Woodruff Scholarship Program is a testament to the generosity of George Woodruff, a man who believed in the power of education to change lives. The program has provided thousands of students with the opportunity to pursue their dreams at the University of Georgia. The Woodruff Scholarship Program is a source of pride for the University and a testament to the legacy of George Woodruff.

*DEBRA ADRIAN WELLS*

When I was invited to the first Woodruff Scholarship Luncheon at the Continuing Education Center, no one knew who the Woodruff Scholarship was. I showed up in class attire, a few minutes late, with my backpack still on my back. Only to learn I had been bestowed one of the great honors of my life... I owe so much to those who have given to this. I may achieve things beyond my wildest imagination, and it all begins at UGA, where I had the most phenomenal fortune that one could imagine.

*Colin Conley*  
WILSONVILLE, OREGON

I'd initially submitted applications from a range of universities... but when I realized that the Woodruff Scholarship was the best, and to be able to go to Georgia, to have that connection to the University of Georgia made sense. As a result, I participated in various programs such as the Woodruff Scholarship Program, and the More Scholarships Program. I was honored to be selected for the Woodruff Scholarship, and I was able to attend the University of Georgia. The Woodruff Scholarship Program is a source of pride for the University and a testament to the legacy of George Woodruff.

*Lee Anne Reynolds, PhD*  
DE 2015  
ASSISTANT PROFESSOR, AUSTINIA UNIVERSITY  
HISTORIC, RESEARCH, AND EDUCATION

One of the things that the scholarship provided me with was the opportunity to meet and work with other students who were also receiving the scholarship. This was a great experience, and it was a great opportunity to learn from them. The Woodruff Scholarship Program is a source of pride for the University and a testament to the legacy of George Woodruff.

*William Hargrave*  
EST. 2004  
RESEARCH, RESEARCH, AND EDUCATION

The first Individual Impact Report was delivered in FY18 (pictured above).  
Two more reports have been delivered since.

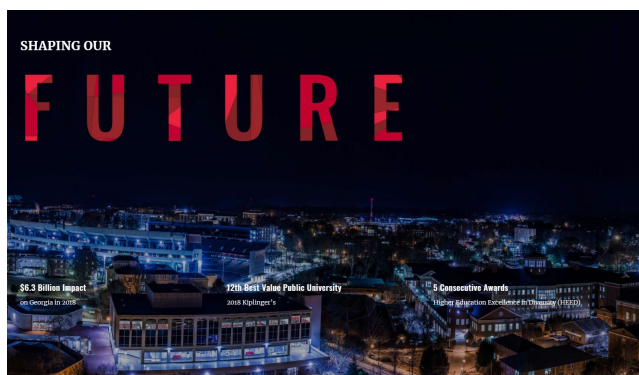
# PRESIDENT'S ANNUAL REPORT

## University/Division Communications

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, 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* is 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, and Heritage Society 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.



## Fiscal Year 2019 at a Glance

### CAREER OUTCOMES

**96%**

of graduates are employed or enrolled in graduate school within six months of graduation.

### STUDENT SUCCESS

**86%**

of students graduate within six years of enrollment, 68% after four years, and 75% after four years plus one semester.

### ECONOMIC IMPACT

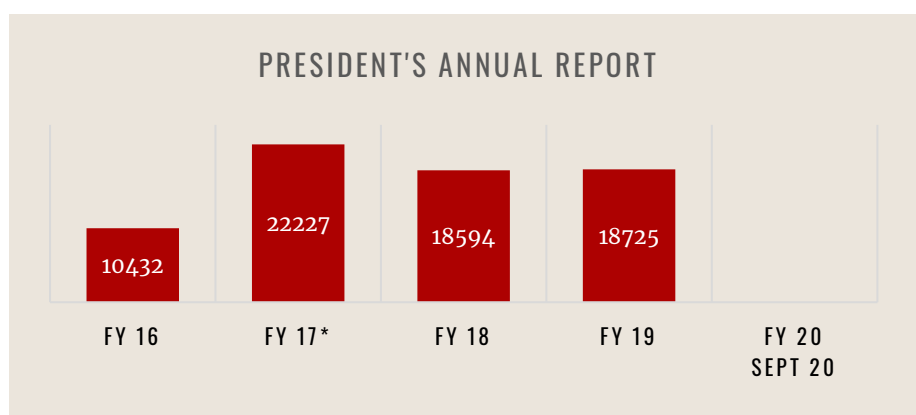
**#1**

in bringing new products to market in most recent ranking by AUTM.

### STUDENT VETERANS

**#2**

tier one research institution in military friendly schools ranked by Victory Media.



The Presidents Annual Report reflecting FY20 will be mailed Fall 2020.

\*The President's Annual Report merged with the Foundation Annual Report in 2017.

# 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

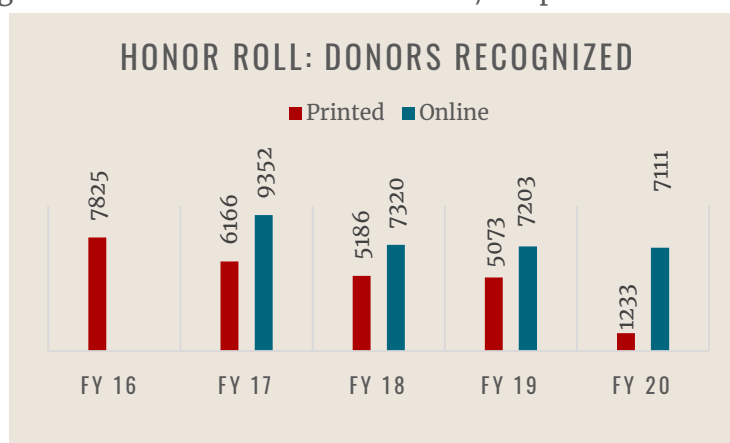
ANNUALLY IN SEPTEMBER

### Presidential Stewardship Coordinators

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, the printed Honor Roll of Donors in the President's Annual Report was reduced in 2020. Heritage Society and Cumulative Giving Societies are the only donor groups listed in the printed report. Annual Presidents Club members (donors of \$1,500+) and Founding Presidents Club Members 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, including updating biographical information that may have changed and making 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).



The Presidents Annual Report reflecting FY20 will be mailed in Fall 2020.

The threshold for the FY18 Online Honor Roll of Donors was raised to \$1,500 to align with Presidents Club.

The annual Presidents Club listing in the Honor Roll of Donors is digital for FY20.

## 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 and an annual reception held the following fall. Beginning in FY18, donors who give at this newly increased level are also stewarded through a decal program that aligns with his/her giving and a Biannual Impact Report each fall and spring.

#### PRESIDENTS CLUB TIERED GIVING LEVELS



Presidents Club began in 1973. The threshold for Presidents Club was raised from \$1,000 to \$1,500 in FY18.

Please see Presidents Club Welcome Packets and Year-End Decals for more information.



## 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

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 and an invitation to the annual PAWS Reception.

Philanthropy at Work Society was established in FY20.

## CUMULATIVE GIVING SOCIETIES

### Associate Director of Donor Relations and 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.

## LOYALTY GIVING SOCIETY

### THIRD PILLAR

#### Associate Director of Donor Relations and Stewardship

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 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 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

**Associate Director of Donor Relations and Stewardship**  
**Presidential Stewardship Coordinators**

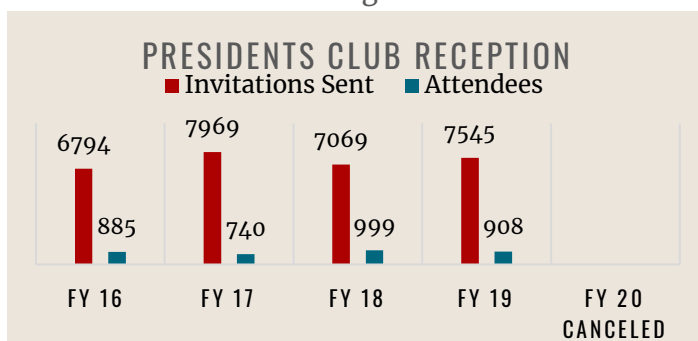
**ANNUALLY IN THE FALL**

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, Cumulative Giving Societies, Heritage Society, and donors who have given \$100,000 in their lifetime. Donor Relations and Stewardship selects 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



The 2020 Presidents Club Reception was cancelled due to COVID-19. A letter from President Morehead and felt pennant will be mailed in its place.





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

## PHILANTROPY AT WORK SOCIETY (PAWS) RECEPTION

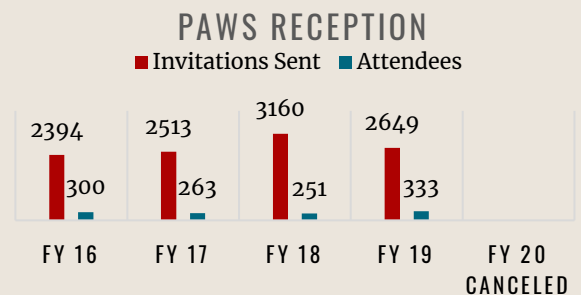


### Associate Director of Donor Relations and Stewardship Presidential Stewardship Coordinators

PAWS Reception recognizes faculty, staff, and retirees at UGA who give a financial gift of any size to the university during the fiscal year. Usually, 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. We are looking forward to hosting our Bulldog family next year!

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.

ANNUALLY IN THE FALL



The 2020 PAWS Reception was canceled due to COVID-19

### 2020 REPLACEMENT



### 2019 RECEPTION



The Reception honoring FY21 giving will take place August 2021.

# 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

The Thank a Donor Day video is e-mailed once as a stand-alone blanket stewardship piece, again to first-time donors, 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 EMAIL

■ Sent ■ Opened

69501

29027

FY 20

FY 21

2020 Thank a Donor Day messages were filmed by students at home due to COVID-19.

“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

### Assistant Director of Donor Reporting and Communications

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 and FY20 videos were well-loved by our Administration and broke records for views! These videos were shared University-wide and received over 250,000 impressions on Facebook and Twitter.



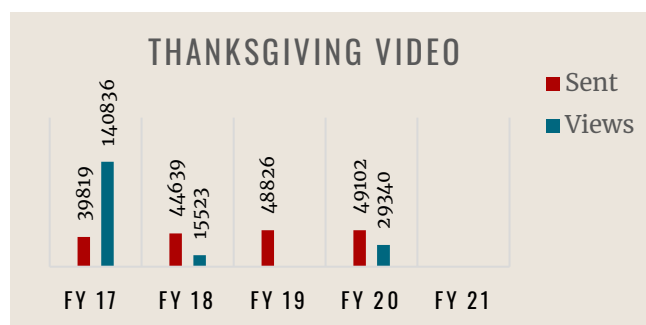
At this time of Thanksgiving, we pause to reflect on your support and the impact it has made on the University of Georgia.

Please be our guest as we reminisce on how we overcome obstacles, join together as one, and rise to the top because of your generosity. You have allowed our students, faculty, and staff to experience opportunities that would have been impossible without your support.

From our table to yours, we wish you a Happy Thanksgiving! Please enjoy this video, made especially for you and sent before it's public release next week.

[View the Video](#)

Video made possible by UGA student workers, interns, and volunteers.



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

*"This. is. simply. INCREDIBLE. Bravo, bravo! You've done it again!"*

LER – ATHENS, GEORGIA

Thanksgiving email stewardship began in FY13.

## THANKSGIVING POPUP CARD

### Donor Reporting Coordinator

Top donor Thanksgiving popup cards began in FY19 as a special touch to enhance stewardship for the newly created Platinum Presidents Club. Cumulative Giving Societies and Trustees are also included in this mailing. The design focuses on campus in the fall and will continue as a series highlighting landmarks.

Thanksgiving card stewardship began in FY19.

### THANKSGIVING CARD

756

FY 20

FY 21

*"Tony,  
Another beautiful card! I love the downtown buildings, the Arch and tree, and Uga of course! It's always so special to get these cards.  
Happy Thanksgiving to you and all the folks who work in your office!"*

KMW – MARIETTA, GEORGIA



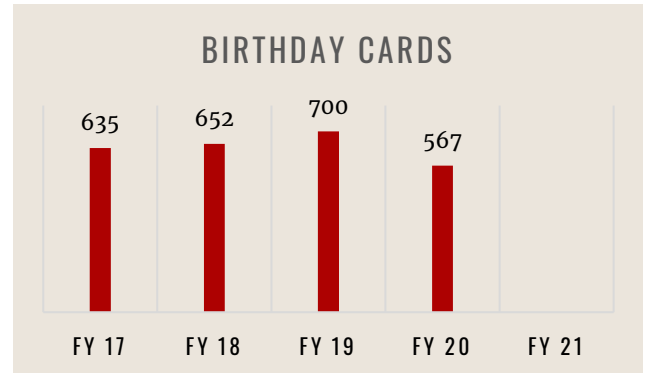


# BIRTHDAY CARDS



## Associate Director of Donor Relations and Stewardship

Birthday cards are sent to key donors, including donors with a cumulative giving total of at least \$500,000, Trustees, and prospects of \$1M+. 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.



August – December 2020 Birthday Cards are digital due to COVID-19.

## 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

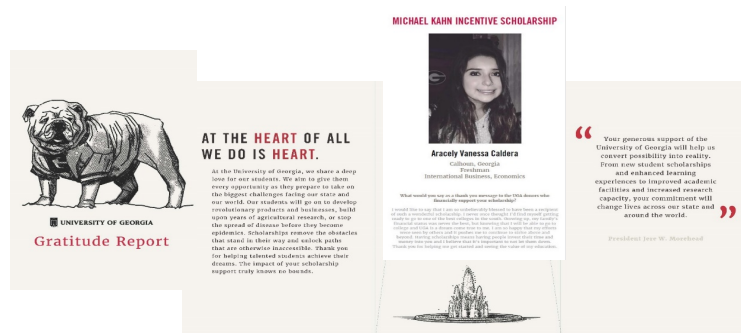
Due to reinterpretations of the Federal Higher Education Act protecting the privacy of students, scholarship stewardship saw many changes over the course of FY19 and FY20. Donor Relations works closely with the Office of Student Financial Aid (OSFA) to adhere to the appropriate processes while advocating for the need to report to donors. Donors may hear from their recipients, but this cannot be guaranteed. We make every effort to obtain thank you messages, but students have their right to remain anonymous. We cannot require them to participate in thanking their donor.

## GRATITUDE REPORTS

Assistant Director of Scholarship Stewardship

### CENTRALLY BASED SCHOLARSHIPS

Donor Relations and Stewardship manages the stewardship of all *non-departmental* scholarship funds (endowed and non-endowed) awarded through Admissions (such as Charter Scholarships), Financial Aid (such as Access Scholarships), and 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. The most effective and efficient form of stewardship for these funds is Gratitude Reports. Gratitude Reports are individualized for each donor and include thank you messages from the very students benefitting from the donor's generosity. Gratitude Reports reinforce our appreciation and show deeper impact, encouraging continued and increased giving. Due to this initiative, donors receive personalized recipient thank you notes while the students are receiving the donor's support. If a donor supports multiple scholarships, all thank you notes collected are included in one mailing.

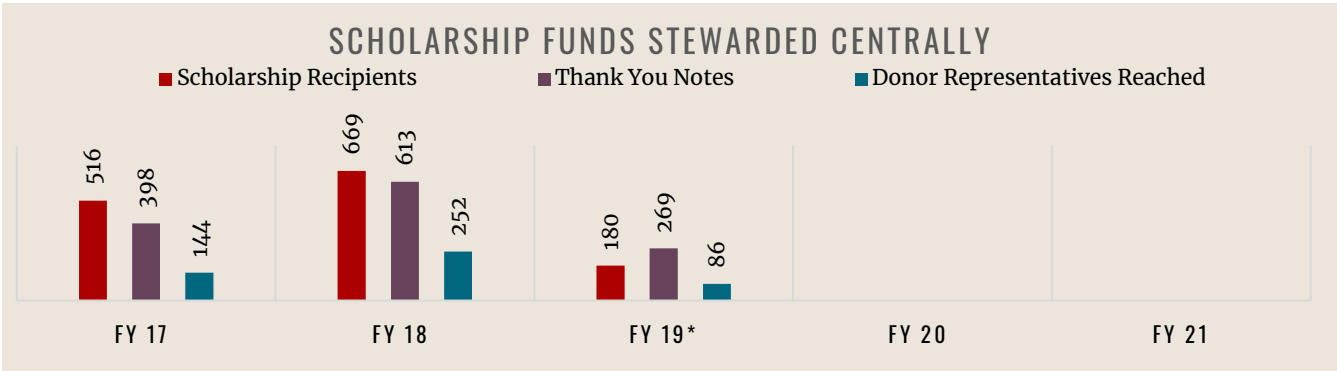


**ADMISSIONS**

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. The information collected is compiled into a standard format and sent to scholarship donors in their Gratitude Report in the Spring.

**FINANCIAL AID**

Scholarship recipients of Financial Aid-based funds are contacted during the fall semester to complete a release of information and request a thank you message, short biography, and photo. The information collected is compiled into a standard format and sent to scholarship donors in their Gratitude Report in the Spring and Summer.

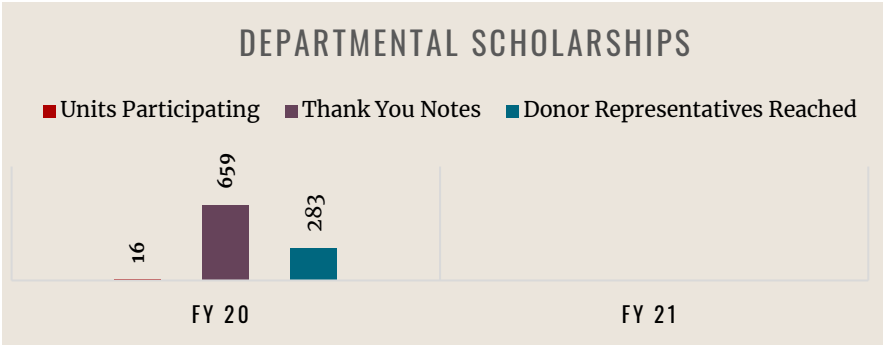


Gratitude Report stewardship began in FY14.

In FY19, need-based scholarships were unable to be contacted directly by our office due to privacy laws.

**DEPARTMENTAL SCHOLARSHIPS**

Donor Relations and Stewardship began offering to include schools and colleges in Gratitude Reports for FY20. The Assistant Director coordinates the Qualtrics survey that collects information, serves as the liaison with Financial Aid, compiles information, and works with the printing company. The responsibility of awarding these scholarships and reaching out to the students remain with unit-based stewardship coordinators. Including schools and colleges strengthened accountability and ensured that donors are receiving annual touches from the university. In addition, donors with multiple scholarships that impact several units are seeing an even more holistic approach to their communication.



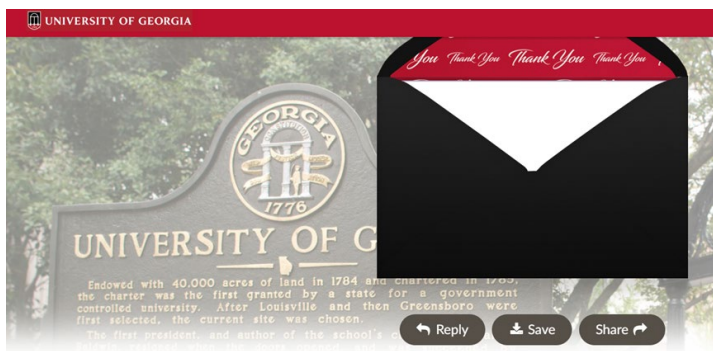
Departmental scholarships were included in Gratitude Reports in FY20.

# THANK VIEW VIDEO MESSAGES

## Assistant Director of Scholarship Stewardship

In FY18, Donor Relations tested Thank View as 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!

Since then, we rolled this product out with a more systematic plan for our units, and in FY20, we flexed our skills even more during social distancing due to COVID-19. We began sending messages to internal groups from the VP for Development and Alumni Relations, and units were forced to pick up personalized videos as a way replace donor visits and small lunches or meetings between donors and scholarship recipients.



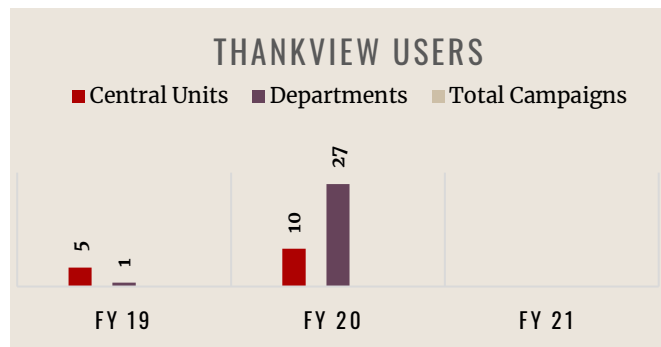
Personalized video messaging is the future of stewardship, and we are looking forward to forging this path with our scholarship donors!

## CENTRALLY BASED THANKVIEWS

Donor Relations and Stewardship utilizes Thank View to share grateful messages from scholarship recipients and will begin to use Thank View in FY21 for birthday communications, milestone giving touches, and CGS special updates.

## DEPARTMENTAL THANKVIEWS

Departments are using Thank View for every type of communication, from scholarship recipient updates and thank you messages, gift acknowledgements, birthday messages, athletics updates, and even weekly workouts! 34 areas are currently using Thank View across campus with over 80 different users creating unique content and engaging with our donors.



Thank View messaging began in FY18.





## ENHANCED STEWARDSHIP FOR SELECT DONORS & PROGRAMS

### Assistant Director of Scholarship Stewardship

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

### ANNUAL GEORGE W. WOODRUFF SCHOLARSHIP LUNCHEON

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

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: 1. Face-to-face stewardship visits with select scholarship donors, 2. Video interviews of scholarship recipients, 3. Individual scholarship luncheons.

The Woodruff Scholars Luncheon was held via Zoom in 2020 due to COVID-19 (pictured above).

### GEORGIA COMMITMENT SCHOLARSHIP PROGRAM STEWARDSHIP

#### Corporate and Foundation Relations

Beginning in 2018, Georgia Commitment Scholarships (GCS) are stewarded by the **Office of Corporate and Foundation Relations**. GCS donors also receive Gratitude Reports, annual Financial Endowment Reports, 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

### Associate Director of Donor Relations and Stewardship

*The Associate Director is involved in two meetings that discuss cultivation and stewardship strategies for the University's top donors and prospects.*

### PRESIDENTIAL FUNDRAISING MEETING

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

### PRINCIPAL GIFTS STRATEGY MEETING

This meeting serves as an opportunity for central development leadership, principal gift officers, prospect management, and donor relations to come together and discuss current strategies for the University's top donors and prospects.



Administration Building

Presidential stewardship was initiated in FY16.

# PRESIDENTIAL DONOR VISIT PLANNING

## Associate Director of Donor Relations and Stewardship

Presidential Stewardship's biggest responsibility is coordinating the stewardship experience surrounding a Development visit with the President. The Associate 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.

The Associate Director schedules from **10-20** presidential donor visits per year.

### 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 Associate 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 Associate 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 Associate 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 Associate Director sends the final briefing to the President two-days before the visit.

**3. ACKNOWLEDGING THE VISIT** The Associate 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 Associate 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

## PRESIDENTIAL EVENT BRIEFINGS

Associate Director of Donor Relations and Stewardship

### FOOTBALL SKYSUITE

Football game days are a timeless way to interact with our donors among the excitement of college athletics. The Associate Director begins working with the Sr. Executive Director and Chief of Staff to coordinate SkySuite invitation lists in April 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.

The Associate Director coordinates an average of **440** football briefings per year. Football briefings are created per couple and increases reflect post-season appearances.

### SPECIAL EVENTS

Like football game days, the Associate 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.

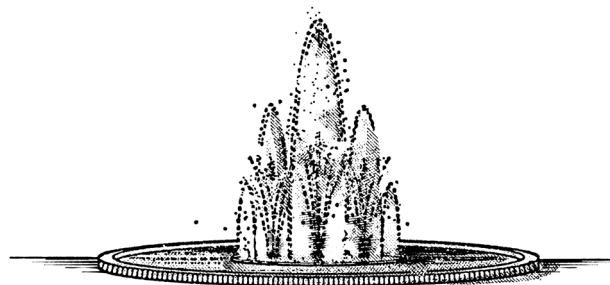
Since 2018, The Associate Director creates an average of **200** special event briefings per year.

The Annual Peabody Awards and regional dinners and events were canceled in 2020 due to COVID-19.

## MISCELLANEOUS PRESIDENTIAL DEVELOPMENT LETTERS

Associate Director of Donor Relations and 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.



Since 2018, The Associate Director writes an average of **30** miscellaneous letters per year.

# 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.

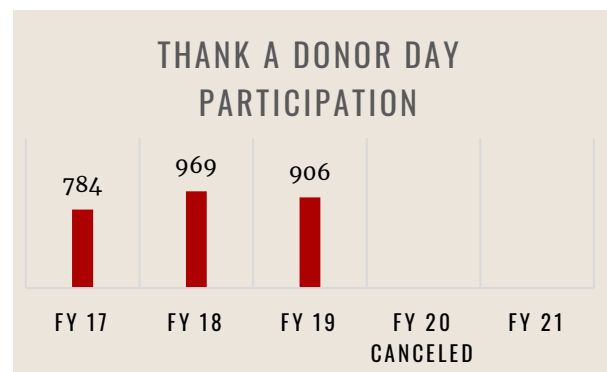
**THANKU**  
An attitude of gratitude at UGA.

## THANK A DONOR DAY

### Associate Director of Donor Relations and 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. As we approached the ninth annual Thank a Donor Day, our circumstances limited us from continuing our traditional day on campus with students, faculty, and staff. Although we were forced to celebrate from a far, that did not stop our students from expressing their sincere gratitude to UGA donors! Usually, our oversized card is 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 – but this year, our hearts were overfilled with the number of students who took time out of their lives to record and write personal messages from home. We hope to utilize this event to collaborate with units campus wide and educate our students about the impact of private giving to UGA in person next year.



Thank a Donor Day began in FY12.

2020 Thank a Donor Day was canceled due to COVID-19. **54** video messages and **35** thank you notes were collected from students at home, instead.



# 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.



## MEETINGS

### Assistant Director of Donor Reporting and Communications

QUARTERLY

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



MONTHLY

## Donor Reporting Coordinator



Tuesday, June 16

Good afternoon Stewies and friends! Today, we are exactly two weeks away from the end of UGA's most successful fundraising campaign. Although we have been required to change our original celebration for this achievement, I'd like to remind you that you should be proud of this milestone. Your contribution of time and talent to Commit to Georgia will make a lasting impact on the university for years to come.

I am most proud of how the stewardship profession has grown and evolved since the public announcement of the campaign. So much has been accomplished through the talented members of Team Stewardship! You made a difference in the success of this campaign. Your acknowledgments, reporting, engagement, and events kept donors inspired through ups and downs, and more fundraising than ever continued to increase their giving. This achievement means that your role in stewardship does not end here. The new stewardship responsibility that we have acquired is permanent, and it is ever more important as we seek to retain these donors and prepare for the future of giving to this university. I know this group will rise to the occasion. Although we are still #StewiesTogetherApart, I don't think we've ever been more together. Thank you!

Tony Springer  
Senior Director of Donor Relations and Stewardship

Following each meeting of Team Stewardship, Donor Relations and Stewardship sends 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.

From March–June 2020, **15** weekly issues of *The Stew* were delivered due to COVID-19.

View issues of *The Stew* and other Team Stewardship materials here:  
[www.issuu.com/teamstewardship](http://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 Summer 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, 23 of the University's units were surveyed 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 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 28 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 scholarship. Development staff collaborate with Units 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 send scholarship and award their donors through special events.

#### SCHOLARSHIP STEWARDSHIP MANAGEMENT

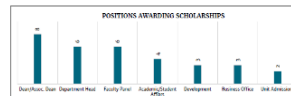
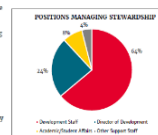
Team Stewardship members play the heaviest role in stewarding scholarship campus-wide, encompassing 44% of the work, and several offices of Development handle both fundraising and reporting of scholarships. Overall, 90% of stewardship is managed by a development staff person.

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

In contrast, the many one-person shops which they had an extra hand to help with the 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 (31 units explicitly listed a committee). Other positions that play a critical role in awarding scholarships include those in Academic Affairs, Business Offices, and Admissions. There 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 their 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

Donor Relations and Stewardship fulfills 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.

## FY21 GOALS

### OVERALL GOALS

Implement campaign closing stewardship	FY21
Identify post-campaign stewardship priorities	FY21
Explore and implement strategies for successful telecommuting	FY21
Redistribute Project Manager's duties	FY21
Temporarily redistribute Scholarship Coordinator's duties until position is filled	FY21
Explore Engagement Center text/call for special stewardship & student engagement	FY21

### PRESIDENTIAL STEWARDSHIP

Implement updated Cumulative Giving Societies welcome packet	Fall '20
Temporarily implement digital birthday card stewardship	Fall '20
Flexibility when planning Presidents Club Reception	Fall '20
Deliver campaign closing stewardship mail/email pieces as determined	Fall '20
Plan and implement 10 <sup>th</sup> anniversary of Thank a Donor Day	Spring '21
Implement new milestone stewardship	FY21
Collaborate with Development/OSE for socially distant presidential stewardship	FY21
Explore major gift stewardship plans	FY21
Propose and implement new presidential gift acknowledgement thresholds	FY21
Propose elimination of Presidents Club digital Honor Roll of Donors	FY21

### REPORTING AND COMMUNICATIONS

Temporarily pivot special acknowledgements to email	Fall '20
Deliver two comprehensive impact reports	Fall '20
Implement new individual reports in annual trustee impact reports	Fall '20
Implement new endowment FAQ in financial endowment reports	Fall '20
Implement new frequency for issues of The Stew	Fall '20
Implement socially distanced Team Stewardship programming	Fall '20
Increase efficiency in the endowed faculty reporting process	Spring '21
Explore digital stewardship matrix with new DARCOMM digital coordinator	Spring '21
Gain more proficiency in marketing efforts, selections, exports, and donor data	FY21

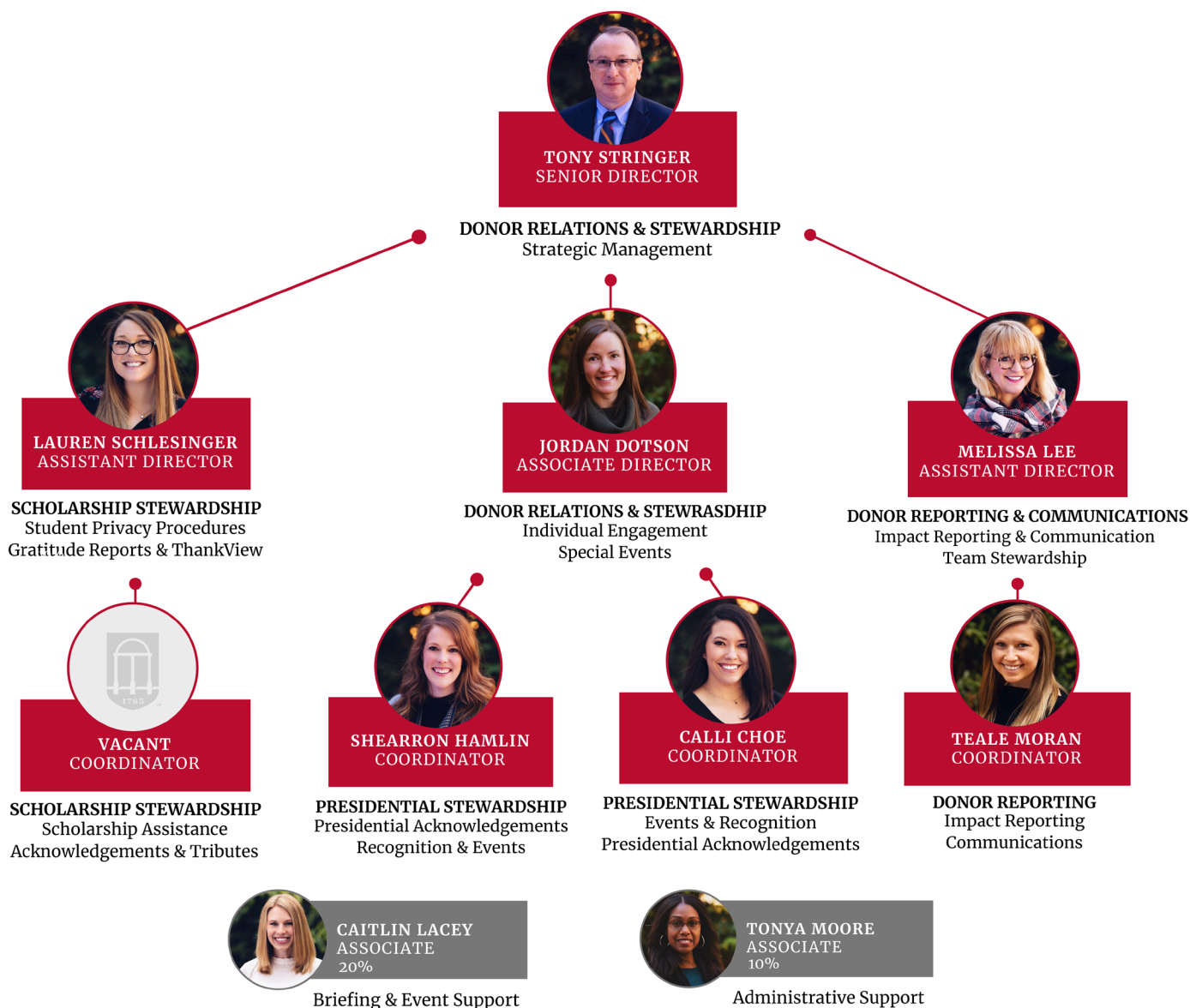
### SCHOLARSHIP STEWARDSHIP

Design and implement new Gratitude Reports	Fall '20
Redefine priorities for scholarship stewardship	Fall '20
Collaborate with units on Gratitude Reports	FY21
Explore and implement socially distanced individual stewardship for scholarships	FY21
Create processes for central use of ThankView (milestone, birthday, endowments)	FY21
Manage, train, and mentor unit use of ThankView	FY21



# THE DREAM TEAM

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



"Great vision without great people is irrelevant."

-JIM COLLINS

## SENIOR DIRECTOR OF DONOR RELATIONS & STEWARDSHIP

### **Tony Stringer**

The Senior Director of Donor Relations and Stewardship is essential to Donor Relations and Stewardship by overseeing all projects produced by the office. By serving as the direct report for Associate Director, 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.

## ASSOCIATE DIRECTOR OF DONOR RELATIONS & STEWARDSHIP

### **Jordan Dotson**

The Associate Director of Donor Relations and 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, and 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. The Associate Director is also responsible for coordinating and executing Donor Relations and Stewardship's signature events, managing giving society recognition, and managing the Donor Relations & Stewardship budget. 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.

The Associate Director additionally manages birthday cards, new milestone stewardship, and monthly Third Pillar acknowledgements in FY21 due to vacancy in our department.

## 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 individual stewardship. The Assistant Director manages the Scholarship Stewardship Coordinator to plan and implement Gratitude Reports for centrally and departmentally awarded scholarships and the monthly/weekly acknowledgement procedures managed by the Scholarship Stewardship Coordinator (currently vacant). This position also manages ThankView use by departments through procedures and creative assistance.

*Due to the success of ThankView during COVID-19, the Assistant Director's responsibility for managing this product has grown significantly in FY21.*

The Assistant Director additionally coordinates ThankView training in FY21 due to a vacancy in our department.

## 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 Individual Impact Reports and Trustee Impact Reports and managing the execution of the Donor Reporting Coordinator's Financial Endowment Reports, Endowed Faculty Impact Reports, and Presidents Club Newsletter. The Assistant Director also serves as the liaison for the Development Communications office and is responsible for managing the execution of quarterly Team Stewardship meetings and the internal stewardship newsletter, The Stew.

The Assistant Director additionally coordinates weekly email acknowledgements (First time donor, second time donor, PAW Society, and tag purchases) in FY21 due to a vacancy in our department.

## PRESIDENTIAL STEWARDSHIP COORDINATOR

### **Calli Choe**

Reporting to the Associate Director of Donor Relations and 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.

The Coordinator additionally manages student workers in FY21 due to a vacancy in our department.

## SCHOLARSHIP STEWARDSHIP COORDINATOR

### **Vacant**

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 and ThankView messaging, the Scholarship Stewardship Coordinator devotes a weekly-work flow to other important stewardship projects, including birthday cards, memorial and honorary gift notifications, milestone stewardship, and first-time, second-time, loyalty, PAW Society, and Georgia tag acknowledgements.

## PRESIDENTIAL STEWARDSHIP COORDINATOR

### **Shearron Hamlin**

Reporting to the Associate Director of Donor Relations and 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, coordinating Cumulative Giving Society recognition, and assisting in generating Presidents Club stewardship. The Presidential Acknowledgement Coordinator also provides event support, assists the Associate Director with budget management, and coordinates the invoicing and accounts payable processes with the assistance of our shared support roles.

The Coordinator additionally coordinates weekly tribute notification due to a vacancy in our department.

## 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 accurate donor reporting for major and principle gifts. This position works collaboratively with Financial Services, Development Directors, and stewardship coordinators and is responsible for creating personalized Financial Endowment Reports, Endowed Faculty Impact Reports, and the bi-annual Presidents Club Newsletter. This position assists the Assistant Director in the production of Individual Impact Reporting and Trustee Impact Reporting. The Donor Reporting Coordinator also coordinates top donor Thanksgiving stewardship and email stewardship. Additionally, this position is significant to successful collaboration within the team by compiling the Stewardship Overview, assisting in Team Stewardship, and developing the monthly Team Stewardship Newsletter, The Stew.

*Due to the success of the weekly issue of The Stew during COVID-19, the Coordinator's responsibility for The Stew will rise to a more frequent newsletter in FY21.*

## PROJECT MANAGER & SHARED SUPPORT

### **Caitlin Lacey & 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 + Georgia Commitment Scholarship letters as needed (weekly) >											
FY21 Presidents Club welcome packet mailing (monthly)											
< Cumulative Giving Society welcome packet mailing and recognition (monthly) >											
FY21 Third Pillar mailing (monthly)											
< Tribute gift notification mailing (weekly) >											
FY21 major donor birthday card email/mailling (daily)											
< Milestone stewardship ThankView (developing process) >											
FY20 Presidents Club decal mailing											
FY20 Honor Roll of Donors											
Campaign closing mailings: PAWS and Presidents Club/major donor											
FY20 donor event preparation (Canceled)											
Thank a Donor Day preparation											
PAW Society Reception (Canceled)											
Presidents Club Reception (Canceled)											
Football Sky Suite Briefings (weekly)											
Regional Donor Events + Peabody Award Briefings											
< Presidential Visit Briefings (as needed) >											
< Need-based scholarship student privacy forms >											
< ThankView oversight >											
< Individual scholarship stewardship (as needed) >											
< Gratitude Report award verification + thank you collection (Admissions/OSFA + units) >											
FY20 summer semester Gratitude Report mailing											
FY21 fall semester Gratitude Report mailing											
FY21 spring semester Gratitude Report mailing											
Woodruff Scholarship Luncheon											
Woods Scholarship Ceremony											
< Stewardship communication copy writing + coordination >											
FY21 first time donor + second time donor + PAW Society + tag email acknowledgements (weekly)											
< Website updates (as needed) >											
Thanksgiving stewardship Video/email + major donor mailing											
Thank a Donor Day stewardship Video/email + major donor mailing											
< Endowment setup + stewardship recipient assignment + fund financial verification >											
FY20 financial endowment report mailing											
FY21 endowment report personalization											
FY20 faculty report mailing											
FY21 faculty verification + thank you collection											
FY20 trustee impact report											
< Individual impact book											
Individual impact book											
Presidents Club Newsletter											
Team Stewardship (Canceled)											
Team Stewardship											
Team Stewardship											
Team Stewardship											
< The Stew (monthly) >											
< FY21 Stewardship Overview + strategic plan refresh											
Mid-Year Overview refresh											
FY22 Stewardship Overview + strategic plan refresh >											
< Internal presentations + proposal writing (as needed) >											
< Advise departments on stewardship as needed (as needed) >											
FY21 Fiscal Year Data Transition											
FY22 budget planning											
FY21 evaluations & FY22 goal setting											
Team retreat											

Presidential Stewardship	Donor Communication
Event/Engagement	Financial & Impact Reporting
Scholarship Stewardship	Internal Communication
Management & Planning	



## GIFT ACKNOWLEDGEMENT & SPECIAL COMMUNICATIONS

## FY21 ANNUAL STEWARDSHIP

## RECURRING STEWARDSHIP

<b>\$1+ Gift</b> <i>All Gifts</i>	<b>\$25K+ Gift</b>	<b>\$25K+ Pledge</b>	<b>\$1.5K+ Annual Giving</b> <i>Presidents Club</i>	<b>\$100K+ Lifetime Giving</b>	<b>\$1M+ Lifetime Giving</b> <i>Cumulative Giving Societies</i>	<b>Endowments</b> <i>Founding Donors and Fund Representatives</i>
<div>Receipt w/ UGA Donor Decal <i>(Gift Accounting)</i></div> <div>Thank a Donor Day Video</div> <div>Thanksgiving Video</div> <div>Acknowledgement <i>(Benefitting Unit)</i></div> <div>Special Constituencies:</div> <div>First Gift Email</div> <div>Second Year Gift Email</div> <div>3+ Year Gift Third Pillar Card w/ Magnet</div> <div>Faculty, Staff, or Retiree PAW Society Email &amp; Reception</div> <div>Georgia Tag Purchase Email</div>	<div>Receipt w/ UGA Donor Decal <i>(Gift Accounting)</i></div> <div>Thank a Donor Day Video</div> <div>Thanksgiving Video</div> <div>Acknowledgement <i>(Benefitting Unit)</i></div> <div>Personalized Presidential Letter</div>	<div>Receipt w/ UGA Donor Decal <i>(Gift Accounting)</i></div> <div>Personalized Presidential Letter</div>	<div>Presidents Club Welcome Packet w/ Lapel Pin Upon reaching \$1.5K during the fiscal year</div> <div>Biannual Presidents Club Newsletter</div> <div>Presidents Club Giving Level Decal</div> <div>Presidents Club Reception Giving Level Ribbon</div> <div>President's Annual Report</div> <div>Online Honor Roll of Donors</div> <div>\$10K+ Presidents Holiday Card <i>(President's Office)</i></div> <div>\$25K+ Thanksgiving Card</div>	<div>Presidents Club Reception</div> <div>President's Annual Report</div> <div>\$500K+ Birthday Card <i>Email through December 2020</i></div>	<div>Cumulative Giving Societies Welcome Packet w/ Personalized Presidential Letter Upon \$1M, \$5M, and \$10M milestones</div> <div>Giving Level Ribbon at Presidents Club Reception</div> <div>Cumulative Giving Societies Print</div> <div>Name recognition on Presidents Garden Wall</div> <div>President's Quarterly Newsletter <i>(President's Office)</i></div> <div>Printed Honor Roll of Donors</div> <div>President's Holiday Card <i>(President's Office)</i></div> <div>Birthday Card Thanksgiving Card</div> <div>Presidential Stewardship <i>(as needed)</i></div> <div>Thank a Donor Day Video Thanksgiving Video</div>	<div>Financial Endowment Report</div> <div>Admissions, Financial Aid &amp; Departmental Scholarships Gratitude Report or message of thanks ThankView messages and individual stewardship</div> <div>Georgia Commitment Scholarships VP pledge fulfillment letter and individual stewardship <i>(as needed with Foundation Relations)</i></div> <div>Chairs &amp; Professors Endowed Faculty Report</div>