



# Grateful Dead

Using Effective Stewardship to Show Gratitude to Planned Giving Donors



# Introductions



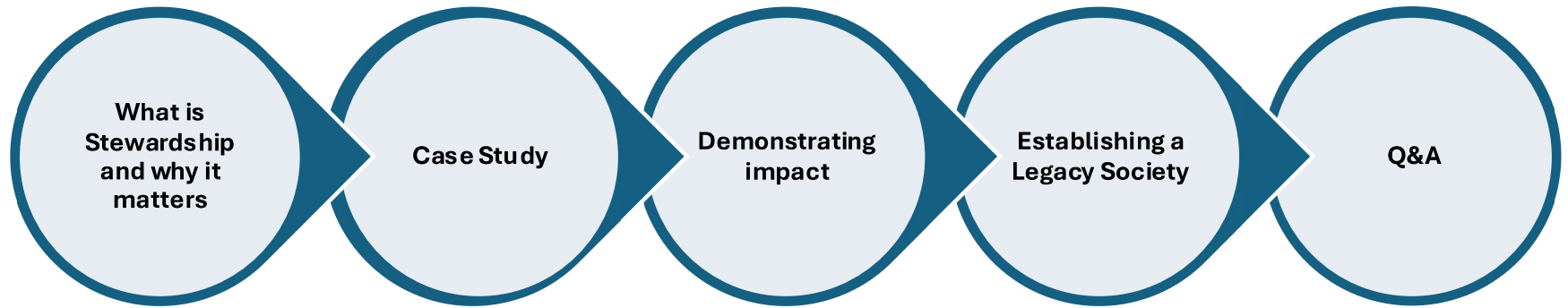
**Tamisha Keith, JD, CAP**  
*Assoc. Dir. Gift Planning,  
Alumni Engagement & Dev.*  
Duke University



**Liana Garcia, MS, PMP, CAP**  
*Dir. Gift Planning,*  
The Community Foundation  
*for Greater New Haven*



# Agenda



# *“Touch of Grey”*

“I will get by...”



# Definition and Importance of Stewardship

- Builds Trust
- Strengthens Relationships
- Inspires Future Giving
- Celebrates Legacy
- Donor is Secure About How Donations Are Used
- Donor Feels Acknowledged and Respected



# The Case of the Missed Opportunity



VS



# The Case of the Meaningful Connection



North Carolina A&T Four



## *“Ripple”*

If my words did glow with the gold of sunshine  
And my tunes were played on the harp unstrung  
Would you hear my voice come through the music?  
Would you hold it near as it were your own?



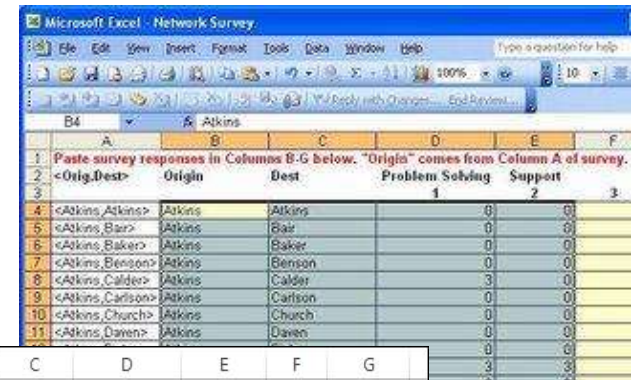
# *“Ripple”* - Impactful Stewardship

- Personalized Communications
- Donor Recognition
- Family Inclusion & Advisory Engagement
- Impact Reporting



# Ongoing Engagement - Mapping

- **Giving Area/Priorities**
- **Events**
- **Contact method**
  - In-Person Visits, Calls
- **Marketing/Communications**
  - Email, Newsletter, Direct Mail
  - Social Media, Website
  - Annual Reports, Impact Reports



Microsoft Excel - Network Survey

1: Paste survey responses in Columns B-G below. "Origin" comes from Column A of survey.

<Orig, Dest>	Origin	Best	Problem Solving	Support	
<Atkins, Atkins>	Atkins	Atkins	1	2	3
<Atkins, Blair>	Atkins	Blair	0	0	
<Atkins, Baker>	Atkins	Baker	0	0	
<Atkins, Benson>	Atkins	Benson	0	0	
<Atkins, Calder>	Atkins	Calder	3	0	
<Atkins, Carlson>	Atkins	Carlson	0	0	
<Atkins, Church>	Atkins	Church	0	0	
<Atkins, Darenz>	Atkins	Darenz	0	0	

	A	B	C	D	E	F	G
1	2015						
2	May						
3	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
4						1	2
5	3	4	5	6	7	8	9
6	10	11	12	13	14	15	16
7	17	18	19	20	21	22	23
8	24	25	26	27	28	29	30
9	31						



# Using Data Effectively

What is Working?

Who is Responding?

How Can We Make it Personal?



# Using Data Effectively

## What

Highlight metrics

- Scholarships Awarded
- Families Served
- Meals Provided

## How

- Use Visuals, Such as Infographics

## Where

- Annual Report
- Website
- Storytelling



# Stewardship Goal

Multiple, meaningful touchpoints  
Without overwhelming the donor



# Case Study: Engaging Next Generation Donors

## Background

- Dr. Delilah Jones, a retired physician and loyal supporter
- Established a charitable remainder trust benefiting her alma mater with a scholarship
- Dr. Jones had no children but close to her niece and nephews, Molly, Casey and Jack
- She involved them peripherally during her lifetime but never formalized their roles in her giving legacy
- Dr. Jones passed away in late 2024. Her gift totaling \$2.1 million
- How can the University honor her memory and activate the next generation?



# Celebrate, Engage, Activate

## **Celebrate and Steward Dr. Jones' Legacy**

- Host a dedication or naming ceremony
- Share her story
- Position her as a model for values-driven philanthropy



# Celebrate, Engage, Activate

## Thoughtfully Engage Molly, Casey, and Jack

- Personal Outreach
- Inclusive Stewardship



# Celebrate, Engage, Activate

## Activate Next Generation

- Values Alignment
- Flexible Opportunities
- Gateway Giving
- Document the story of her gift



# Professional Advisor Stewardship

First and Most Trusted Point of Contact



# Professional Advisor Stewardship

- Networking and Educational Events
- Circles, Committees or Councils
- Advisor Stars
- Specific Newsletter
- Organization's Annual Report
- Feature Both Advisor & Donor in Success Story
- Offer Next-Gen Philanthropy Program



# Professional Advisor Scenario

## Characters:

- Ann Marie, Director of Gift Planning at a University
- Althea, Estate Planning Attorney
- Mrs. Welnick, Client/Donor

**Setting:** Althea and Ann Marie have a longstanding professional relationship. Althea calls Ann Marie to discuss Mrs. Welnick, a longtime client who is interested in including charitable gifts in her estate plan.



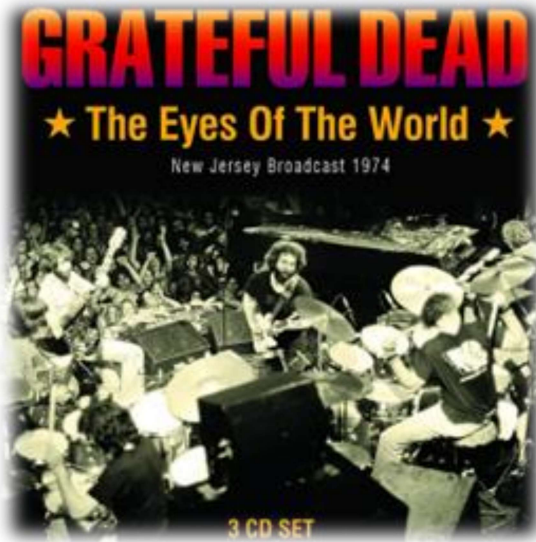
# *“Eyes of the World”*

*Wake up to find out that you are the eyes of the  
world*

*The heart has its beaches, its homeland and  
thoughts of its own*

*Wake now, discover that you are the song that  
the morning brings*

*But the heart has its seasons, its evenings and  
songs of its own*



# How Do You Recognize Legacy Society Members?



# ***“Eyes of the World”*: Establish a Legacy Society to Thank, Recognize and Engage Donors**

## **Legacy Donors**

- Define clear parameters for membership
- Create a statement of intent for donors to submit

## **Structure**

- Include tiers or recognition levels
- Identify welcome materials



# *“Eyes of the World”*: Legacy Society

## Thanking Members and Recognition Strategies

- Public acknowledgment
- Make your legacy society event an induction ceremony
- Ongoing engagement
- Recognize family



# Legacy Society Welcome Packet

## Examples Can Include:

- Insert with the history of your society
- Small trinket with organization or society brand
- Preferred listing reply card
- Save the date for upcoming events
- Letter from Executive Director or Chancellor
- Certificate
- Lapel Pin



# *“Eyes of the World”*: Legacy Society

## Engaging Members

- Offer opportunities for members to share their stories and inspire others
- Provide regular updates on organizational impact and progress
- Give them program related swag



# *“Attics of My Life”*



*In the attics of my life  
Full of cloudy dreams unreal  
Full of tastes no tongue can know  
And lights no eye can see  
When there was no ear to hear  
You sang to me*



# *“Attics of My Life”*

## **Building Meaningful Relationships for Generational Support**

- More than just saying thank you
- Building meaningful, lasting relationships
- Focus on gratitude, transparency and impact
- Inspire donors to leave a legacy that supports mission for generations to come



# Thank You



**Tamisha Keith, JD, CAP**  
**[Tamishakeith@gmail.com](mailto:Tamishakeith@gmail.com)**  
**(336) 965-5424**



**Liana Garcia, MS, PMP, CAP**  
**[Lgarcia@cfgnh.org](mailto:Lgarcia@cfgnh.org)**  
**(860) 716-8973**

