

# CaLARTS

## STEWARDSHIP PLAN

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## OFFICE OF ADVANCEMENT STEWARDSHIP STANDARDS

Stewardship consists of the entire range of activities communicating to the donors how their gifts are being used. Stewardship & Special Events is responsible for providing any special reporting promised during solicitation, and also for filtering new gifts into standard stewardship reporting cycles. Good communication between the fundraising and stewardship staff is essential. Day-to-day responsibilities of the stewardship staff vary, from writing official thank-you letters to event planning to tracking and monitoring funds. Stewardship is both the first and final step in maintaining a strong relationship with a donor.

### **Office of Advancement's stewardship best practices cultivate and sustain long-term relationships with CalArts donors by:**

- Creating a culture in which stewardship activities are highly valued and widely practiced.
- Implementing processes that support stewardship activities and make staff accountable for meeting specific standards.
- Verifying gifts are used in a timely manner that fulfills the donor's stated purpose.
- Benchmarking donor attitudes and perceptions in order to measure donor satisfaction with CalArts' development practices.

### **Best practices consist of:**

- Timely and accurate processing of gifts.
- Timely and appropriate acknowledgment of gifts by the dean and the development officers.
- Routine reporting to donors on the use of the gifts by the dean and the development officers.
- Routine letters of appreciation to donors by students and faculty.
- Appropriate public recognition of gifts.

**Stewardship staff will provide the following services to development officers:**

- Provide stewardship orientation for new development officers.
- Coordinate a Stewardship Advisory Committee to oversee stewardship guidelines and activities; define unmet stewardship needs; and recommend new policies as appropriate.
- Support processes and programs for periodically benchmarking donor attitudes and perceptions through surveys and focus groups.
- As a member of the Advancement Services team, monitor gift transmittal and gift processing procedures to ensure accurate and timely gift processing.
- Assist development staff in resolving gift transmittal or processing problems.
- Oversee the gift acknowledgment process within Advancement with close attention to improved efficiencies and accuracy. Monitor results and recommend adjustments. Create and update template acknowledgment letters.
- Create and maintain a database of stewarded funds and fund-related activities.
- Create and maintain an endowment database and tickler system.
- Provide an endowment checklist to ensure proper steps are taken in a timely manner.
- Provide monthly a list of donors who have endowed new funds.
- Provide monthly a list of donors who are first time donors to CalArts.
- Produce standardized financial reports for endowments upon request.
- Ensure recognition for major donors, including the production of the annual CalArts honor roll and other significant donor recognition.
- Develop systems to distribute donor photos taken at events.
- Produce donor recognition items.

**Stewardship Checklist:**

The following checklist comprises a range of stewardship activities to be routinely carried out by development staff. Additional recommendations should be carried out whenever possible.

With the exception of Acknowledgements, the stewardship activities below are grouped by fund type.

CATEGORY	BEST PRACTICES ACTION STEPS	ADDITIONAL RECOMMENDATIONS
<b>Acknowledgments</b>	<ul style="list-style-type: none"> <li>➤ The Office of Advancement acknowledges every gift.</li> <li>➤ Letter mailed out to donor within seven business days of the gift processing date.</li> <li>➤ First time donors to CalArts receive a special acknowledgment from the VP of Advancement.</li> <li>➤ Refer to “Donor Acknowledgment Process” document for further details.</li> <li>➤ If the Office of Advancement is aware of employer matching gift eligibility at the time of the receipt of the initial gift, there should be recognition of the match in the donor acknowledgement.</li> </ul>	
<b>Current Expenditure Funds</b>	<p>Donors who make a current use gift of \$XXX and over for any purpose will receive:</p> <ul style="list-style-type: none"> <li>➤ Annual “State of CalArts” letter at the end of fiscal year.</li> </ul>	
<b>Naming a Building</b>	<p>Donors who <b>name a building</b> will receive:</p> <ul style="list-style-type: none"> <li>➤ Regular progress reports from the President, the Dean or the development officer, including a financial report if appropriate.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Make certain the placement and size of plaque or signage conforms to CalArts policies.</li> </ul>

CATEGORY	BEST PRACTICES ACTION STEPS	ADDITIONAL RECOMMENDATIONS
	<ul style="list-style-type: none"> <li>➤ A formal announcement of gift (i.e., press release, coverage in local papers, and other appropriate publicity.) Criteria include gift amount and other significant factors (i.e., potential for future giving, prominence of donor or program donated to, human interest/publicity, etc.) as determined by Advancement team consensus.</li> <li>➤ A formal groundbreaking and dedication ceremony, hosted by President or Dean, as appropriate.</li> <li>➤ A reception or dinner to honor the donor, hosted by the President or Dean, when building is completed.</li> </ul>	
<p><b>Naming a Space</b></p>	<p>Donors who <b>name a room, lab, hallway, or any outdoor space</b> will receive:</p> <ul style="list-style-type: none"> <li>➤ Recognition for their gift, such as a reception hosted by the Dean.</li> <li>➤ Annual progress reports from the Dean or the development officer, including a financial report if appropriate.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Make certain the placement and size of plaque or signage conforms to CalArts policies.</li> </ul>
<p><b>Capital Improvements</b></p>	<p>Donors who make a gift for <b>capital improvements</b> will receive:</p> <ul style="list-style-type: none"> <li>➤ A final report from the Dean when project is completed.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Invite donor to campus when renovations are completed.</li> </ul>
<p><b>Endowed Chairs</b></p> <p>Minimum gift requirement: \$1,500,000</p>	<p>Donors who endow a chair will receive:</p> <ul style="list-style-type: none"> <li>➤ A letter from the President or Dean that includes a brief bio of the inaugural chair holder, description of his or her area of specialty, and duration of appointment.</li> <li>➤ President or Dean holds an intimate dinner or reception to recognize donor and chair holder.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Dean hosts annual reception to honor new chair appointments and to recognize donors.</li> <li>➤ Development officer sends donors articles of interest regarding chair holder's activities/awards, and chair holder's recent publications.</li> <li>➤ Donor is presented a recognition gift during dinner or</li> </ul>

CATEGORY	BEST PRACTICES ACTION STEPS	ADDITIONAL RECOMMENDATIONS
	<ul style="list-style-type: none"> <li>➤ The inaugural chair holder is presented a framed certificate commemorating the appointment.</li> <li>➤ Letter of appreciation to the donor from the chair holder.</li> <li>➤ Chair holder to provide annual activity reports for donor.</li> <li>➤ If appointment is for two or more years, the recipient is asked to write a letter of introduction, an annual status report, and a closing letter when the term is finished.</li> </ul> <p>When a new chair holder is named to an EXISTING chair, the donor will receive:</p> <ul style="list-style-type: none"> <li>➤ A letter from the Dean or department chair that includes a brief bio of the newly appointed chair holder, description of his or her area of research, and duration of appointment.</li> <li>➤ A financial report if appropriate</li> <li>➤ Dean hosts a small lunch or dinner to introduce newly appointed chair holder to donor.</li> <li>➤ Letter of appreciation to the donor from the chair holder.</li> <li>➤ Chair holder to provide annual activity reports for donor.</li> </ul>	<p>reception.</p> <ul style="list-style-type: none"> <li>➤ After fiscal year end, Dean sends annual “State of the School” letter to chair donors in appreciation for their support and referencing the importance of endowments to the Institute. (List to include donors who are making annual payments toward their commitment.)</li> <li>➤ Place article in campus publication(s) announcing creation of chair and/or naming of chair holder as deemed appropriate by Office of Advancement – Public Affairs and school.</li> </ul>
<p><b>Faculty Projects</b></p> <p>Minimum gift requirement: \$25,000</p>	<p>Donors who endow a faculty Projects fund, or donors who make a gift to an existing fund, will receive:</p> <ul style="list-style-type: none"> <li>➤ A letter from the President or Dean that includes a brief bio of the faculty and a description of the project.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Arrange for donor to meet with faculty recipient(s) on campus.</li> <li>➤ If multi-year appointment, encourage recipient to annually update donor on current research.</li> </ul>

CATEGORY	BEST PRACTICES ACTION STEPS	ADDITIONAL RECOMMENDATIONS
	<ul style="list-style-type: none"> <li>➤ Faculty recipient to write a letter of appreciation to donor during first year.</li> <li>➤ Annual narrative reports.</li> <li>➤ A financial report if appropriate.</li> </ul>	<ul style="list-style-type: none"> <li>➤ After fiscal year end, Dean sends annual “State of CalArts” letter to ALL donors of endowed faculty projects in appreciation of their support referencing the importance of endowments to CalArts..</li> </ul>
<p><b>Scholarships</b></p> <p>Minimum gift requirement: \$25,000</p>	<p>Donors who endow a scholarship fund, or donors who make a gift to an existing fund, will receive:</p> <ul style="list-style-type: none"> <li>➤ Annual letter from the President or the Dean announcing recipients for the current academic year.</li> <li>➤ Accompanying bio of the scholarship recipient(s).</li> <li>➤ A financial report if appropriate.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Invite donor to meet with scholarship recipient(s) during the academic year.</li> <li>➤ Collect letter of appreciation from current recipient(s) to send to donor with note from the Dean..</li> <li>➤ Invite donors to annual scholarship reception hosted by Dean.</li> <li>➤ After fiscal year end, the President or the Dean send annual “State of CalArts” letter to ALL donors of endowed scholarships in appreciation of their support referencing the importance of endowments to CalArts.</li> </ul>
<p><b>Event Sponsorships</b></p>	<p>All event sponsors will receive:</p> <ul style="list-style-type: none"> <li>➤ Report on event from development officer.</li> <li>➤ Acknowledgment note from the President or Dean.</li> </ul>	<ul style="list-style-type: none"> <li>➤ President, Dean, or development officer send photos and materials from event when appropriate.</li> </ul>

## ANCILLARY ACTIVITIES TO CONNECT DONORS TO CAMPUS LIFE

<b>Invitations</b>	<ul style="list-style-type: none"><li>➤ Campus and school events</li><li>➤ Campaign donor recognition events</li><li>➤ Annual Fund Donor Recognition event</li><li>➤ President's State of CalArts Address event</li><li>➤ Alumni events</li></ul>
<b>Communications</b>	<ul style="list-style-type: none"><li>➤ CalArts campaign updates</li><li>➤ Place announcements of awards in CalArts publications</li><li>➤ Press releases</li><li>➤ Birthday and holiday cards</li><li>➤ Annual report</li><li>➤ Stewardship mailing</li><li>➤ Annual honor roll of donors</li><li>➤ Special announcements</li><li>➤ CalArts website</li></ul>
<b>Stewardship Visits</b>	<ul style="list-style-type: none"><li>➤ President</li><li>➤ Dean, Program Director, Faculty</li><li>➤ Volunteers and Board members</li><li>➤ Corporate visits</li></ul>