



Stewardship Reports 101

June 2012

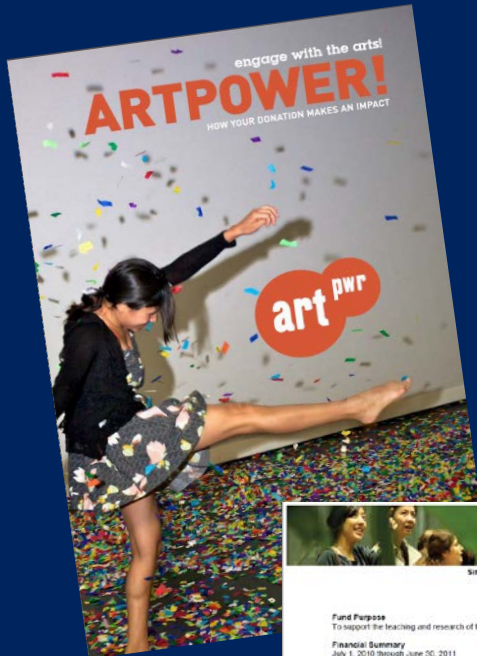
Introduction

Well-crafted stewardship reports demonstrate to donors:

- the positive impact of their gifts,
- that their donations are being used according to their intent,
- that we appreciate their generosity,
- and that there are opportunities for their continued support.

Every development professional should be able to prepare a quality stewardship impact report for a donor or segment of donors in about 4-6 weeks.

Stewardship Reports – Brochure, Fund Report, Letter, Impact Report, E-newsletter . . .



UNIVERSITY OF CALIFORNIA, SAN DIEGO

September 16, 2011

Mr and Mrs. [REDACTED]
903 Sycamore Terrace Apartment 311
Sausalito, CA 94066-9978

Dear Mr and Mrs. [REDACTED]:

On behalf of the entire East Warren College community, I want to thank you for your philanthropic support this past academic year. At UC San Diego, innovation is central to who we are and what we do. Our students learn that an education isn't acquired only in the classroom—it is the result of an array of dynamic opportunities. Your generosity helps support students as they explore, create, and achieve—both inside and outside the classroom.

This past year, students from across the campus helped the university celebrate its milestone 50th anniversary with special activities to honor the remarkable achievements, innovations, and history of UC San Diego. At Warren College, students attended the annual Warren Live concert, dined with faculty at Hugh Table Dinners, conducted research as a member of disciplines through the Undergraduate Research Scholarship program, and kept abreast of current events with the Newspaper Readership Program. We were able to offer many of these opportunities thanks in part to the generosity of parents and families like you, who have contributed to the Warren Provost's Fund and UC San Diego Parents Fund.

We look forward to continuing to work with our bright and talented undergraduates in the 2011-12 year, engaging them in their academic courses, exposing them to hands-on research, and helping to expand their social horizons. For more information and updates about the College, visit www.wc.ucsd.edu.

As a top 10 public university, we are committed to providing your students with a vibrant range of academic and co-curricular experiences that will both enhance their development as future scholars and benefit their marketability after graduation. Your generous commitment to Warren College ensures that our students have an outstanding educational experience. I thank you again for your generosity and hope that you will continue to support Warren College and UC San Diego. For more information about how you can continue to make a difference, please contact Suzanne McClain, Director of Development—Parent and Family Giving at 858-522-3467 or suzanne.mcclain@ucsd.edu.

With your support, UC San Diego will continue to shape minds, change lives, and build a student one discovery and one achievement at a time.

Sincerely,

Suzanne Adler
Provost, East Warren College

UC SAN DIEGO ENDOWED FUND REPORT

UC San Diego
9500 Gilman Drive, W09-02
La Jolla, CA 92093-0940

Sir Ciria W.J. Granger endowed Chair in Economics
July 1, 2010 through June 30, 2011
Fund Number: F-3447
Invested by the UC San Diego Foundation

Fund Purpose
To support the teaching and research of the Chair holder.

Financial Summary
July 1, 2010 through June 30, 2011

Market value at June 30, 2010	\$ 381,870
Net Gifts and Transfers	117,450
Realized & Unrealized Gain (Loss)	78,300
Payees	(16,443)
Market Value at June 30, 2011	\$ 540,222
Accumulated Payees at June 30, 2011	\$ 37,136

The fund holder as of June 30, 2011 is Susan King
Department: Economics
Division: Social Sciences

A statement of the uses or impact of the endowment payment for this fund:

In 2011, the Granger Chair became fully funded and the following two junior academics were selected to jointly hold the chair:

Andrew Santosa, Assistant Professor – In recent work, Santosa has examined the implications of decreasing data quality for conclusions about changes in the U.S. wage distribution. Due to the recent high non-response rates to income questions in the U.S. Census, it has become increasingly difficult to measure changes over time. Santosa has helped develop econometric tools for dealing with these kinds of data problems.

Brendan Boone, Assistant Professor – Boone's recent research focuses on anomalies in the prices of options written on market indices such as the S&P 500. In joint work with Lutz Schmidt, a graduate economics student at UC San Diego, Boone has developed a new statistical procedure for identifying anomalies in option prices. Empirical results suggest that such anomalies exist and cannot be easily attributed to statistical noise. This has implications both for strategies that individual investors might follow as well as for understanding how financial markets function.

THE IMPACT OF YOUR GIVING TO UC SAN DIEGO

Presented with gratitude to Mrs. Ethel Shelby June 2012

We sincerely appreciate your generosity and commitment to the UC San Diego School of Medicine. This report highlights the positive impact that your support has had on generations of students.

SCRIPTS ASSOCIATES OF OCEANOGRAPHY

E.W. Scripps Associates supported stellar students, innovative research, and priority initiatives at Scripps this year. Thank you!

First-year Graduate Student Fellowships
Paul Boudreau and Jasmeet K. Dhaliwal received critical fellowship support from E.W. Scripps Associates.

"I appreciate your support of science, believing in the ideas, creativity, and potential of our graduate students. With your continued support, students at Scripps will continue to design and undertake novel projects, which will further our understanding of the field of oceanography."
— Jasmeet

Open House for New Student Recruits
The open house event for prospective students is an important step in the recruitment process for Scripps each year. With support from E.W. Scripps Associates, 60 of the best and brightest prospective Ph.D. students were able to travel to Scripps from all over the world to participate in the open house and see Scripps put our best

Join or Renew Today
E.W. Scripps Associates members provide \$1,000 or more annually to benefit a wide variety of projects at Scripps, including student research and innovative research initiatives.
[Join / Renew Now](#)

Upgrade Your Membership
If you are a Scripps Oceanography Society (SOS) member and would like to upgrade to E.W. Scripps Associates (\$1,000 annual membership), please call Mary Carling at (858) 522-4113 or email mcarling@ucsd.edu

Sign Up for explorations now
Ride the tide of exciting Scripps Oceanography science stories and news e-mailed to you. FREE! Explore Scripps science behind-the-scenes with exciting interactive multimedia stories available only online. [Sign Up!](#)

E.W. Scripps Associates Quarterly Science Event
MARCH 11: Save the Date

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This report was published by the UC San Diego Office of Concessions and Fund Development. If you have any questions or comments, please contact Development at (858) 524-0535.

Objectives

By the end of this briefing, you will have learned:

- How to prepare a stewardship impact report in 5 major steps
- Whom to consult in the report writing process
- The components of a well-crafted stewardship report
- Where to find templates and examples

5 Steps to a Well-Crafted Stewardship Impact Report

1. Consider audience, purpose, and mission
2. Gather information
3. Engage colleagues
4. Draft the report
5. Finalize the report



Step 1: Audience, Purpose, & Mission

- *Audience: Whom are you acknowledging and stewarding?*
 - Individual donor
 - Foundation/Corporation donor
 - Segment of donors (certain gift level, time period, or fund)
 - Principal gift donor

- *Purpose/Objective: What do you want to communicate?*
 - Thank You!
 - Impact of Gift – Who, What, Where, How (e.g. “Because of your support, we were able to . . .”)
 - Use of Gift

- *Underlying Theme(s): How does this all tie back?*
 - UC San Diego Mission
 - The mission of your department, initiative, and area
 - Campaign messaging

Step 2: Gather the Information

- **Access the Donor Database**
 - Giving History
 - UCSD Involvement
 - Research Documents
 - Contact Reports
 - Media Articles
- **Interview Development Team Leader and Team Members**
 - UCSD Involvement
 - Important Relationships
 - Personal History
 - Get back stories and quotes from faculty, students, and leaders
 - Access the gift agreement for language that you can use in the impact report
- **Contact the Fund's Business Officer or PI**
 - Identify fund expenditures during the time reported
 - Help craft a short narrative with language translated from the proposal and other scientific/medical documentation to describe how the money was spent, what the research/program is about, and the goals achieved.
- **Conduct Basic Internet Research**
 - Google
 - UCSD web site and e-communications
 - UT online (SignOnSanDiego)

Step 3: Engage Your Colleagues

If the report is . . .	Then engage...
For a principal gift-level donor OR prospect	Principal Gifts Office
For a segment of donors (e.g. for a specific service line) or includes a faculty “touch”	Faculty Member
Requested by a Development Professional other than the Team Lead	Team Lead
Campus-wide, above \$25,000	Donor Relations & Stewardship
Includes a giving summary or financial update component	Donor & Fund Stewardship
For a General Campus or an SIO initiative	Senior Writer, Donor Relations & Stewardship
For a Health Sciences Capital initiative	HS Capital Initiatives Stewardship Coordinator
For a Health Sciences initiative	Donor Relations & Stewardship
Going to be presented by the Chancellor or a VC/Dean	Principal Gifts Office; Health Sciences SMT
Going to be presented by a faculty member	Faculty Member

Step 4: Drafting the Report

- **Determine the Structure & Design**
 - For a brief report to a specific donor for one specific purpose, **write a letter**.
 - To demonstrate impact to donors, re-engage and update donor, **design a stewardship brochure**.
 - To report on an endowment, scholarship/fellowship, service line, chair/research/faculty support for an individual donor or segment of donors, **craft a 3-5 page impact report**.
 - For a principal gift donor and a comprehensive stewardship report, **work with DR&S to design a Shutterfly Book stewardship impact report**.
- **Consider Providing Financial Information**
 - Detailed lifetime giving – list of gifts in the addendum
 - Summary of giving – gift totals by fund in the addendum or bullet list in the report
 - A chart or a short narrative paragraph the report
- **Access Report Templates and Samples on the DO Tool Kit**

Components of a Stewardship Impact Report

- Report Cover
- Leadership Message
- Stewardship Report
 - 2-6 pages, color, headings, short text, photos, quotes
 - Introduction, thank you, because of your support
 - Financial info, mission, future direction, contact info
- Addendum Cover and enclosed attachments



SAMPLE

THE IMPACT OF YOUR GIVING TO UC SAN DIEGO



We appreciate your generosity and commitment to advancing medicine, research, and health care over the past ten years at UC San Diego. We'd like to share with you just how much your support has positively impacted the UC San Diego Health Sciences community.

*Presented with
gratitude to*

*Donor Name and
Donor Name*

June 2011

SAMPLE

UC San Diego
HEALTH SCIENCES

Strides in Battling Cancer

**Thank You
from the
Dean**



Thank you for your many contributions to UC San Diego's Health Sciences community. You have helped shape our academic health system and have elevated health care for San Diegans and many others. Because of friends like you, we are leading the way into the next era of medicine.

**Thank You
from the
Director**



The Moores Cancer Center has benefitted greatly from your gifts, your influence with our community, and your leadership on the Board. Thank you for being our champion. We truly appreciate your support!

OUR LEADERS

Since its founding in 1978, the UC San Diego Moores Cancer Center has made significant strides in the battle against cancer as well as improving the treatment of cancer. To win this battle, we must have the most talented leaders to pave the way to victory. The Moores Cancer Center recently recruited NAME, a genomics expert, to collaborate with our other physicians to identify suspect genes that are more susceptible to certain drugs so that they can better predict the course of the disease and the ability to aggressively and effectively treat it. As the costs of genetic testing decrease, genomics will play an ever greater role in defining, diagnosing, and treating specific cancers. Leaders like NAME, as well as comprehensive studies and advancements, would not be possible or successful without transformational leadership gifts as well as an ongoing income stream of unrestricted gift giving. Because of generosity like yours, the Cancer Center directs funds to the most innovative science and care, attracts top experts and renowned faculty and physicians, and delivers tomorrow's cancer care today in San Diego. You both are our integral partners in UC San Diego's strides to understand and battle cancer.

OUR CHAMPIONS

Your work with the Moores Cancer Center Advisory Board since 20XX has also made a significant impact on the direction of the Center. Under your leadership, the Board successfully refocused its efforts after the completion of the Center's building campaign and revised the bylaws. You have been instrumental in recruiting new members to the Board, whose skills and interests will best serve the future growth and success of the Moore's Cancer Center.

RECRUITMENT OF THE BEST

An internationally renowned cancer scientist, Dr. NAME, was recruited as TITLE in 20XX. Because of your \$XX endowment, he was able to build a world-class cancer center and recruit 36 oncologists since 20XX, generating a 75% increase in the number of clinic visits at the Moores Cancer Center and over 40,000 patient visits a year.



Many of these oncologists also conduct laboratory-based and clinical research, which also helps Dr. NAME recruit additional prominent scientists and physicians skilled in research and clinical care locally, nationally, and internationally. In the past X years, we welcomed to the Moores Cancer Center NAME from Scripps (anti-angiogenesis drug development); NAME from Stanford (cancer stem cells); NAME from Dana-Farber Cancer Institute (glioblastoma stem cells); NAME from Harvard (neurosurgery); and NAME from Emory University (pediatric oncology) among others.

THE POWER OF UNRESTRICTED GIFTS

We are grateful for your participation in the Moores Cancer Center's fund-raising events, particularly the annual Celebrity Chefs Cook Gala. With the \$XX raised at the Gala in MONTH, Dr. NAME in DEPT was able to purchase ITEM to launch TITLE, a highly competitive seed money research program in which pilot projects are awarded and launched with the prospect of future federal long-term funding.



The level and flexibility of unrestricted gifts over the years have enhanced the Moores Cancer Center and San Diego cancer care in profound ways. In the past X years, the Moores Cancer Center was able to confer the designation of "Comprehensive Cancer Center" – the highest and most difficult level of recognition possible by the NCI; operate a clinical investigations unit with over 300 ongoing trials; enroll more than 400 patients in the therapeutic studies and almost 20% of Moores Cancer Center patients in some form of experimental therapy; and implement the Patient and Family Services program to provide counseling, education, disease specific support groups, patient transportation, and a Patient Advisory Council.

"Your generous financial support as well as your committed personal engagement, time, and insights have magnified the positive influence that UC San Diego is able to have on the growth, diversity, and health of our community. On behalf of the University family and the people we serve, thank you!"

– Name, Chancellor

WITH MUCH GRATITUDE – Name Student

Thank you very much for this scholarship; your support means so much to me. Now in my junior year, I am planning for my M.C.A.T. exam next quarter and to submit applications to medical schools in next spring. With being a Resident Advisor, volunteering at two hospitals, shadowing a doctor at the Moores Cancer Center, working a research lab, and maintaining a 4.0 GPA, I have not had any time to earn money on my own outside of school. Because of your support, I feel like someone has faith in me and my future success as an oncologist, and a heavy weight has been lifted from my shoulders as I budget for the upcoming quarter. I am so grateful for your generosity.



YOUR INSTRUMENTAL SUPPORT – Name Student

Your generosity has allowed me to participate in the engaging research environment of the NAME Laboratory in the Moores Cancer Center. I have been observing the metabolic output of bacteria and fungi using mass spectrometry with the hope of observing anti-fungals and other molecules with therapeutic potential. I hope to continue this research through my senior year at UCSD this fall. I will soon graduate with a degree in chemistry and then pursue graduate studies in pharmaceutical chemistry. This scholarship support has been instrumental in expanding my academic and research experiences. Thank you for this wonderful opportunity!



THE NEAR FUTURE – THE HOSPITAL FOR CANCER CARE

In four years, the new Jacobs Medical Center will open, and one of its three hospitals, The Hospital for Cancer Care, will offer 72 inpatient beds, innovative surgical suites, and coordinated, multidisciplinary care. The Hospital for Cancer Care has been designed with significant input from cancer patients, doctors and nurses, and families to create a healing, supportive environment. Adjacent to Moores Cancer Center, the Hospital for Cancer Care will enhance the discovery and development of new cancer treatments and enable UC San Diego Health System to build upon its international reputation for translational medicine.

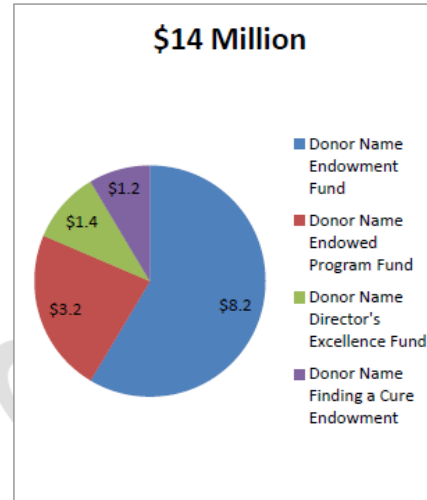
"As a team, the two of you are our truest champions, working tirelessly to help us raise awareness of UC San Diego's strengths and goals as well as helping us to raise funds for our students to pursue their degrees in medicine. Thank you for all you are doing to help us keep UC San Diego strong and vibrant."

– Name, Vice Chancellor

FINANCIAL UPDATE

We are proud to report to you that in the past X years, the market values of all of the endowment funds you have established have increased by X%. As you know, this ensures that research and care at the Moores Cancer Center has the operational support needed for the long-term. The chart to the right represents your cumulative giving totals for each of the funds you established.

Thank you for your dedication to providing leadership gifts as well as annual gifts to build each of these endowment funds. Generations of students, faculty, clinicians, and patients will benefit from your philanthropy and legacy at UC San Diego for decades.



Your support has been vital to the advancement of the UC San Diego Moores Cancer Center. We are proud to recognize you as a partner in the effort to improve the health of our community. Thank you!

If you have any questions or would like to learn more, please contact Name, Director of Development, at (858) 888-8888 or email@ucsd.edu

MOORES CANCER CENTER MISSION

The Moores Cancer Center's mission is to translate promising scientific discoveries into new and better options for the prevention, diagnosis, and treatment of cancer and for the amelioration of pain. Our unique "bench-to-bedside" approach to cancer research and patient care supports the broadest range of cancer activities in the San Diego community. From research in molecular genetics to the most advanced treatments, Moores Cancer Center is at the forefront of the fight against cancer, developing promising new therapies and making them available to cancer patients throughout the region.



Step 5: Finalize the Report

1. Retrieve edits from colleagues
2. Edit the report and proofread
3. Compile attachments and assemble total package
4. Secure signatures from leadership
5. Print the final copy
6. Deliver to the donor
7. Enter stewardship activity contact report
8. E-mail a final PDF copy to Wendy Waddell for entry into the donor database



Suggested Work Flow

	Mon	Tues	Wed	Thurs	Fri
Week 1	Step 1: consider audience, purpose, & mission (DOD partner with Dev Assistant).		Step 2: gather information (DA access donor data base, UCSD web site, and Google).	Step 2: gather information (DOD to contact Business Officer and PI; DA and DOD work on interviews and quotes).	Step 2: gather information (DA & DOD collect articles and photos).
Week 2	Step 3: engage your colleagues (DOD and DA notify colleagues; set up meetings to plan, draft, design, review, finalize).	Step 4: draft the report (DOD and DA engage DR&S and D&FS; DA access the DO Tool Kit to get a stewardship report template).	Step 4: draft the report (DA compose leadership message and draft impact descriptions for each heading (e.g. "Because of your support, we were able to . . .)).	Note: remember the lead time it takes to get signatures from the Chancellor, VC, and other leadership. Build this into your timeline.	
Week 3	Step 4: draft the report (DA compose headings, draft text, insert photos/captions, insert quotes).			Step 4: draft the report (DA, DR&S, DF&S draft introduction, text, financial information, conclusion).	
Week 4	Step 4: draft the report (DA design the front cover and the Addendum cover).	Step 4: draft the report (DA and DR&S gather, design, and compile the documents for the addenda).	Step 5: finalize the report (DA and DR&S share drafts with colleagues to proof, edit, format).		
Week 5	Step 5: finalize the report (DA secure signatures on leadership messaged).		Step 5: finalize the report (DA and DR&S make necessary edits based on colleagues' feedback).		Step 5: finalize the report (DOD consult with DR&S to determine delivery and follow up strategy for sharing the report with the donor).
Week 6	Step 5: finalize the report (DA retrieve final edits and approvals on final draft).	Step 5: finalize the report (DA print final copy of report).	Step 5: finalize the report (DA and DR&S package and prepare to deliver to donor).	Step 5: finalize the report (DOD or Leadership delivers it, DA enters contact report, DA sends a copy to DR&S to store).	Done! Donor feels appreciated and inspired! Good job!

Summary

- To prepare a stewardship report, follow 5 major steps of:
 1. consider your audience and purpose
 2. gather information
 3. engage your colleagues
 4. draft the report
 5. finalize the report
- Know whom to consult for help and where to find templates and examples on the DO Tool Kit so that you don't have to start from scratch.
- Reports should include a message from leadership, thank you messages from beneficiaries, demonstrate the impact of the gift, and be nicely designed with headings, color, photos, and quotes.
- Work with Donor Relations & Stewardship, the Team Leader and Team Members, and/or the VC/Dean on the strategy for publishing the report, delivering the report, following up, and entering the contact report.



We can help you!

Lynsey Buerer: Donor Relations & Stewardship
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