



INDIVIDUALIZED STEWARDSHIP STRATEGIES

**PREPARED BY THE OFFICE OF STEWARDSHIP AND DONOR
RELATIONS AT MIAMI UNIVERSITY**

Individualized Stewardship

In order to best reach donors in priority segments, Miami University's Office of Stewardship and Donor Relations (OSDR) implements individualized stewardship strategies in partnership with development officers. The goal of these strategies is to take a personalized approach of engaging with donors in order to increase engagement, strengthen campus partnerships and at times, solicit future gifts.

In the calendar year of 2022, individualized stewardship strategies were executed by two staff members of OSDR in partnership with **21** development officers. Two priority segments are the focus on individualized stewardship: personalized stewardship and active stewardship. Budgetary guidelines for giving gifts are **\$115** or less for donors in Personalized Stewardship and **\$75** or less for donors in Active Stewardship. Please note, our team works hard to strategize touchpoints that are of low to no cost.

PRIORITY SEGMENTS

PERSONALIZED STEWARDSHIP

Donors in this segment have cumulative gifts and commitments of over **\$1,00,000**.

160 HOUSEHOLDS

\$12,458,973

Campaign
Commitment

8

Contacts per
year on average

ACTIVE STEWARDSHIP

Donors in this segment have cumulative gifts and commitments of over **\$50,000**, are unmanaged, and likely to give another gift of **\$50,000**.

100 HOUSEHOLDS

\$707,438

Campaign
Commitment

7

Contacts per
year on average

*Numbers in the above charts reflect the 2022 calendar year, and were pulled from Tableau profiles created for each segment by our IT team. Campaign commitment provides total cumulative commitments to the campaign in 2022. Contacts per year on average reflects communications from advancement overall, including individualized stewardship touches.

CUSTOM TOUCHES

Every donor is unique and part of their stewardship journey in our priority segments is identifying opportunities to personalize their experience. These experiences cannot be summed up as one activity, as they are unique based on the donor and circumstances. Custom touches may include a specialized impact report created for a program, follow up from a recent visit or part of a strategy to celebrate a special event. Our team works closely with development officers to identify and execute these custom touches.

Custom Touch: A hand-delivered celebratory champagne basket for donors who are Miami Mergers in advance of their daughter's wedding (she is a Miami graduate too).



Custom Touch: Welcome snacks for a donor who moved their student across the country to begin their Freshman year at Miami. Miami apparel was included for the family and some essential move-in items like cleaning supplies and a decorative plant!

Custom Touch: An engraved frame with a photo of the donor with scholarship recipients from their scholarship dinner held at the President's house, Lewis Place. Mailed as follow up from the event with a note of appreciation.



CUSTOM IMPACT REPORTING

Outside of standard impact reporting, custom impact reports are utilized as a uniquely elevated and personalized experience for each donor. Our office creates a variety of elevated impact reports from soft cover reports with infographics to highly personalized hardcover books. The style of report is coordinated with the development officer and reflects the donor's giving history and volunteer service.



Custom Programmatic Impact Report

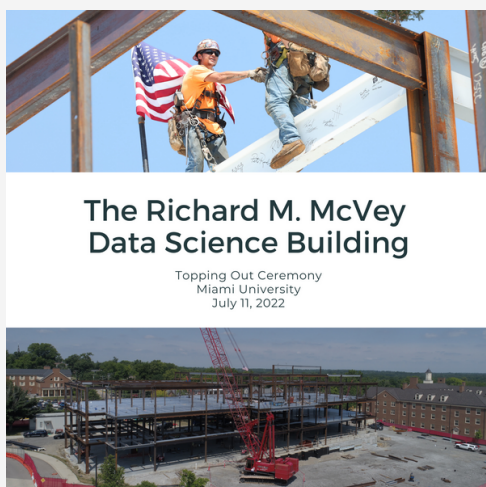
Certain funds allow the opportunity for expanded impact reporting that provides a snapshot from staff and students. These customized reports are utilized to provide the donor with a glimpse inside the program. Click the report to the left for a view into a custom impact report.

Lifetime Impact Book

These personalized books weave the story of the donor from their time as an undergraduate, if applicable, to their years of service. Lifetime impact books can be created at a variety of different levels, from books the donor relations team designs to some that are designed by our communications and marketing team. Click the books to the right for an example of a custom designed lifetime giving impact book.



Capital Project or Naming Dedication Photobook



Capital project or naming dedication books are tools our office uses to commemorate a donor's impact on our campus. When donors are able to be in-person, the book reflects their experience at a naming dedication and highlights of the event. When donors are not on-site or a capital project passes a milestone, an impact book is used to share Miami's excitement for their gift and get a glimpse of the project status. Click the book to the left to view an example of capital project book. This book commemorated the topping out ceremony for a new building on campus, a ceremony which is an important part of the construction of a building where the last beam is put in place. Our team wanted to share this exciting milestone with the donor!

BIRTHDAY CELEBRATIONS

Birthdays are a way to celebrate our donors and their unique interests. Our staff works closely with Development Officers to identify opportunities to celebrate birthdays in a personal way. Most birthday celebrations center around milestones (those that end in 5 or 0), however when appropriate, birthdays outside of milestones may be acknowledge outside of a card, email or phone call.

In 2022, **67** birthdays were celebrated. Among those celebrated, celebration strategies included sending flowers, Miami branded apparel and goods and even specialized ThankView videos created by campus partners. Below are some samples of personalized gifts and feedback from donors.

The Gift: A Miami license plate cover for an avid car collector

Donor Feedback: "Joanne & I want to sincerely thank you for the birthday card and license plate holder. This was unexpected and extremely appreciated by my wife and myself! My 70th birthday was something that I will always remember. I have experienced such kindness that will last my lifetime!

This morning, I immediately put the license plate holder on my Lamborghini Aventador. I have attached picture to this e-mail.

Again, Thanks for being so thoughtful & kind!"



The Gift: A Miami branded saddle blanket for a donor who rides horses and has an affinity for our Equestrian Center gifted from the President

Donor Feedback: Donor informed development officer she, "absolutely loves it" and sent a thank you to the President



The Gift: Miami luggage tags sent to a donor that is an avid traveler and took part in an Alumni trip to Kenya

Donor Feedback: "Thank you for thinking of me on my birthday and for the Miami luggage tags! We just got back to our condo in Wilmette last night and they were waiting for me. We are getting excited about our trip to Kenya."

THANKVIEW STRATEGIES



END OF YEAR SCHOLARSHIP RECIPIENT THANKVIEWS

Donors at the principal gift level that have a preference to receive video communications were selected to receive an End of Year ThankView from their scholarship recipient. In 2022, **33** donors received personalized videos from students.

Student recipients are encouraged to film a short video sharing an update of their semester and their appreciation. Scholarships with multiple recipients are compiled to one video to send to the donor. Since ThankView is a platform used campus wide, this strategy adds no cost.

Donor Feedback:

"I LOVE these thank you videos!!! They really give the donor a good idea of who the scholarship recipients are. They are inspirational and engaging. THANKS!!!!!!!"

THANKFUL THANKVIEWS

Seeking ways to engage donors with appreciation during the month of November, specific campus partners were asked to create a Thankful ThankView. Thankful ThankViews were utilized to share gratitude, provide program updates, and offer an invitation to engage in the future. This was the first year this strategy was utilized and our staff plans to replicate this model in future years.

Donor Response

"The video ThankView was very nice. We will talk on Friday about future plans. (It's only 85 today in Naples!)"



GRADUATION ANNIVERSARIES

Every alumni weekend, classes that celebrate their 50th year since graduation are honored with a dinner and induction to the Hughes Society (a society that honors graduates of 50 or more years). The COVID-19 Pandemic meant that 3 classes (1970, 1971, 1972) had missed the opportunity for this special celebratory experience. In 2022, the return of in-person Alumni Weekend activities offered the 3 classes a celebration. Donors in our priority segments that were unable to attend received a special package with a "we missed you" note, a collage with old year book photos of the donor and a medal for their respective class year. In total, **28** donors received this celebratory touch. Each package cost about \$15 plus shipping.



FOOTBALL SPIRIT PACKS

Donors in the high priority stewardship segments with an affinity for football and who may not have an opportunity to attend a game in person are sent a spirit pack. Spirit packs include a few game day themed snacks, a note about cheering on our RedHawks and some Miami branded goods to help them celebrate Game Day. A sample of the spirit pack can be seen to the right, additions to the packs included notes from key campus partners and development officers. Each spirit pack was around \$35 plus shipping.



Of the **8** donors who received spirit packs, the total cumulative lifetime giving and commitments of this group is **\$16,742,427**.

CAMPUS VISIT WELCOME BAGS

As pandemic restrictions lifted and individuals have grown more comfortable with traveling and in-person campus visits, our community has seen an increased number of hotel visitors. When an opportunity of a donor visit is identified by development officers, our office assists by providing an extra welcoming touch to donors who stay overnight. Donors receive a Miami branded canvas tote filled with snacks and water, as well as a welcoming note from a campus partner or development officer they will visit with during their stay. Welcome bags on average range from \$20-\$25 and on the rare occasion may be more if apparel is added or another branded good.



2022 IN REVIEW

In total, **221** individualized touches were executed in partnership with **21** development officers. These individualized touches are part of a strategy to engage donors in a unique and personal way to steward their past gifts and to maintain a relationship to solicit future gifts.

