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.
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

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

Strides in Battling Cancer

OUR LEADERS

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 benefited greatly from your gifts, your influence with our community, and your leadership on the Board. Thank you for being our champions. We truly appreciate your support!

OUR CHAMPIONS

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 cost of genetic testing decrease, genomics will play an even 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 giving. Because of generosity like yours, the Cancer Center directs funds to the most innovative science and care, attracts top experts and renown 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.
RECRUITMENT OF THE BEST

An internationally renowned cancer scientist, Dr. NAME, was recruited as TITLE in 20XX. Because of your $XxX endowment, he was able to build a world-class cancer center and recruit 36 oncologists since 20XX, generating 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 Chef Cook Gala. With the $X 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 confirm 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.

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.
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

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