

Watch the webinar here:

<https://youtu.be/ygIKL4jxTlw>



ToucanTech Webinar

Stewardship – The importance of thanking your donors from day 1

Hello!

Rachel Hadley-Leonard, RHLConsulting

- Background in education, marketing & fundraising. 30+ years!
- Teacher & Senior Leader– Maintained & Independent Schools
- Marketing in industry – John Lewis, AbA etc.
- Marketing & fundraising in schools – inc. Marketing Manager, Head of Marketing, Alumni Relations Manager, Development Director
- Former Director and Chair of Admissions, Marketing & Communications in Independent Schools (AMCIS)

Currently:

- Independent Schools' Development, Admissions & Marketing Consultant
- Judge for Times Educational Supplement (TES) Independent Schools Awards
- Judge for global InspirED Brilliance Marketing & Fundraising Awards
- Professional Mentor
- Independent School Governor



thank
you

- The importance of a stewardship strategy
- The stewardship cycle
- Time v Money - Why both are of equal importance
- Using video to say thank you
- The Stewardship/Annual Report
- Stewardship Ideas for your Development office
- Stewardship on a budget

“ Feeling gratitude and not expressing it is like wrapping a present and not giving it ”

Dr. William Arthur Ward (1921-1994),
American author, educator, and motivational speaker

“ Thanks, sir; all the rest is mute ”

William Shakespeare (~1564-1616), English playwright & poet.
From: All's Well That Ends Well, Act II, Scene 3



What is stewardship?

It's about saying thank you

Showing gratitude to donors

It's about developing relationships

Constantly communicating your appreciation

It's about securing the next gift

Spending money to generate money

The way in which you acknowledge receipt of a gift from the very first gift, to the end of the relationship with your organisation



Why say thank you?

Shows appreciation

Builds relationships

Demonstrates impact

Preparation for the future
(Renew and Upgrade)

Aforethought not afterthought!

Strategy

The importance of a stewardship strategy

Developing a culture of
philanthropy

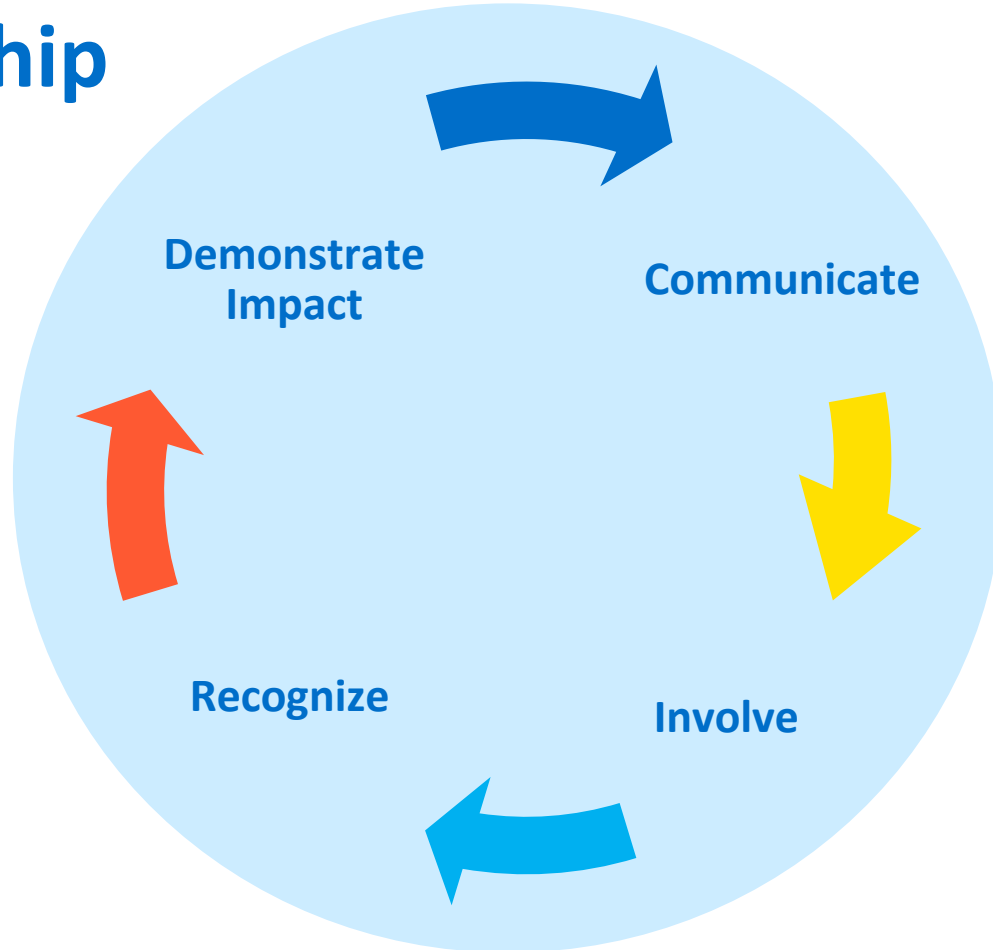
Integral to school development
and development plan

Proactive not reactive



**What is the
stewardship
strategy?**

Stewardship Strategy



Communicate



Newsletters



Emails



Telephone



Video



Social Media



Events

Involve



Advisor



Volunteer



Board Membership



Focus Group

Recognize

- Public thank-you
- Letters, cards, notes
- Plaques
- Annual report
- Societies



Donor Recognition

To Name or Not to Name? – That is the Question



The Gift Shop was made possible
by a generous gift from

**Mr. and Mrs.
John Smith**

Considerations

Consent

Right to Anonymity

Personality

Oops!



Demonstrate Impact

Annual Report

Videos

Case Studies

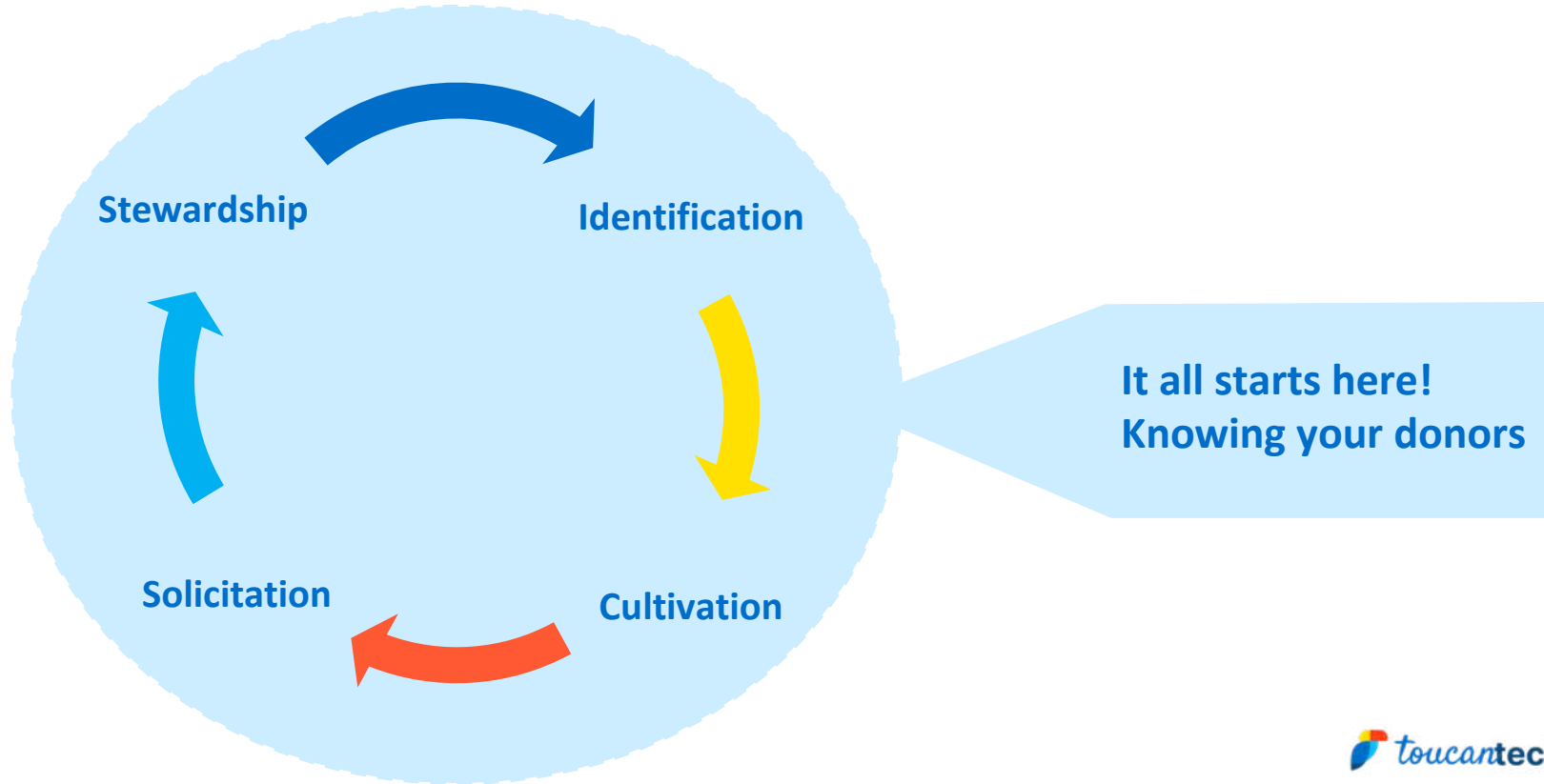
Visits & Meetings

Feel Good Factor



The importance of the CRM database & Moves Management

The stewardship cycle



Using your CRM to say, and track, your 'Thank You's'

(examples from ToucanTech...)



Set up automated personalised thank you emails when someone makes a donation



Use 'Note' categories to flag donors who need a personal thank you at the end of the year



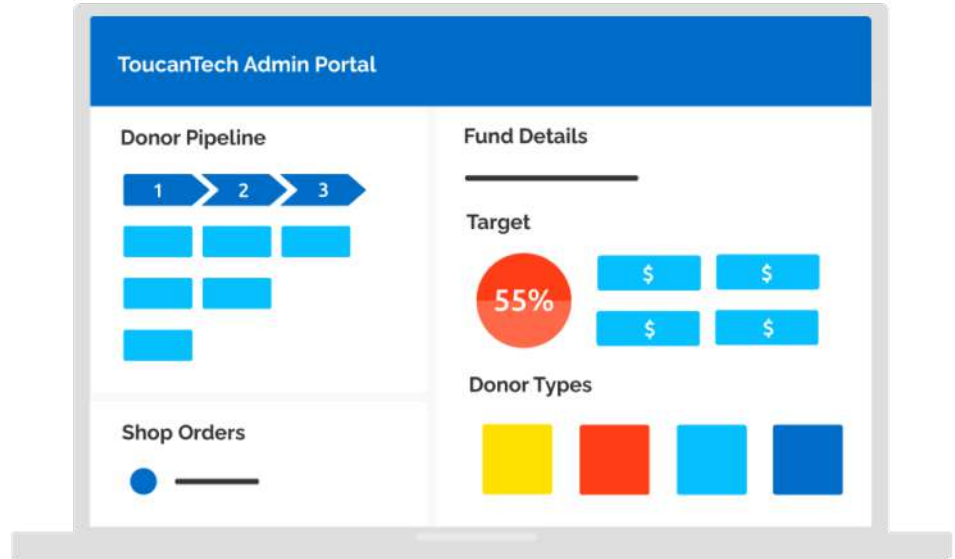
Run filters to identify people who have been 'thanked' and those awaiting a stewardship follow-up



Enable donors to add custom info when they donate - e.g. preferred name to publish in the annual brochure



Track 'linked donations' and acknowledgement names (e.g. Kate Murray donates on behalf of "The Murray Family")





Mass vs Bespoke Stewardship

Customize, Customize, Customize

Stewardship should be...
“As thoughtful and bespoke as your cultivation”

Graham-Pelton



Time v Money

All gifts are equal...but some are more equal than others?

Whose Job Is It Anyway?



**The Head/
Principal**



**Chair of
Governors/Trustees**



**The Development/
Advancement
Director**



Whose Job Is It Anyway?

“The attitude and commitment of the Headteacher is crucial to fundraising success”

Crowe Clark Whitehill

“Many wealthy philanthropists wish to interact with the equivalent of the CEO, as they would when carrying out any other significant business transaction. This doesn’t mean that the whole cultivation and solicitation process has to be managed by the Head, but there is an expectation they will be involved”

Graham Pelton Strategic Fundraising

Stewardship Ideas

Your Ideas

1. **Warwick School** —Written note of thanks from Bursary Recipients every 5 years
2. **Bishop Vesey Grammar School** - Donor Pin badges
3. **Stamford Endowed Schools** - Thank you calls from Bursary recipient
4. **Solihull School** - First anniversary of gift cards
5. **Bolton School** - Zero birthday cards i.e. 50/60/70/80 yrs of age
6. **Merchant Taylors' School, Liverpool** - Old Crosbeian wine as gift to donor
7. **Princethorpe College** - Old Princethorpien made Princethorpe Blue Cheese as gifts and at events
8. **Manchester Grammar School** - 80th birthday 'old school dinner' invitation
9. **Magdalen College School** - Thank you cake - replica of building
10. Many more Ideas to follow!



The stewardship/annual report



Our Campaigns and Fundraising Groups

Bursaries

Bursaries remain central to the work of the Development Office and whilst our planned relaunch of our bursaries campaign didn't get to happen this year, we did take the opportunity to shine a light on the hardship element of our bursaries programme. As a school we spend hundreds of thousands of pounds every year supporting families with fee assistance by way of bursaries, scholarships and hardship awards. Living in such uncertain times, it is more important than ever that the Development Office can continue to depend on supporters to help provide as many bursaries as possible. We also wish to reconnect with as many former bursary pupils as possible, as it is through those personal stories that people can see the benefit of these incredibly rewarding opportunities.

Capital Campaign

Our professional team has nearly successfully completed the detailed technical design of the building and Bill of Materials and the project will soon be ready to be taken to tender at the appropriate time. We're all 100% committed to building the Science Centre as soon as we can, but of course some things have had to shift in light of recent events. The impact of the COVID-19 pandemic has, inevitably, meant that we are taking time to consider the financial situation, as well as taking expert advice on when it would be best to advance the project to the tendering stage. We do, however, anticipate that our trustees will be in a position to finalise the timeline for the Science Centre build within 12 months. We are also very excited about the campus-wide benefits the project will bring and this additional time will allow us to firm up plans for those improvements, including art, dining, economics, business studies, geography and the removal of the last portacabins.

Legacy Society

We're delighted that our legacy society - The Jules Chevalier Society - is now fully up and running. We have a brand-new brochure and have received multiple enquiries about legacy giving over the last few months. If you want to know more, please flip to the back page for contact details to find out more information. Whilst we won't be hosting any in-person get-togethers of the society until we feel it is safe to do so, we are hoping



Our Fundraising Groups

A huge debt of gratitude must go to our two wonderful volunteer groups who support the work of the Development Office.

With thanks to:

The Development Focus Group

Nigel Bromley, Ian Davis, Debbie Glover, Robert Lee, David Lomas and Christine Silvester

The Development Focus Group is made up of experts from a wide range of fields from across the Princeshorpe Community. They help the Development Office by reviewing campaign ideas and fundraising initiatives by offering feedback and advice which helps us to engage with our stakeholders more effectively.

The Science Campaign Board

Timothy Douglas, Quintin Cornforth, James Hutcheson, Rachel Jeffries, Rowland Johnson, Phil Popham and Mary Wheldon.

The Science Campaign Board is made up of industry experts with high levels of experience in business, campaigns, communications, government, and capital projects. Members act as advisers and ambassadors whose sole focus is on fundraising for the Science+ Campaign. The Board has made multiple appearances at school events last year, speaking to dozens of Princeshorpe families in addition to offering time and expertise.

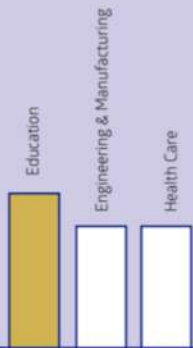
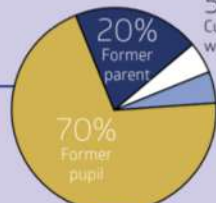
If you're passionate about Princeshorpe and have an interest in fundraising - why not get involved?

If you think you could offer your time and expertise to one of our committees, please get in touch by contacting the Development Office on makingadifference@princeshorpe.co.uk



A Spirit of Family: The First Fifty Years of Princeshorpe College book is the most wished for item of merchandise. You can purchase your copy by visiting connect.princeshorpe.co.uk/shop

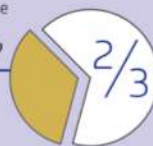
Old Princeshorpians' Survey Summary



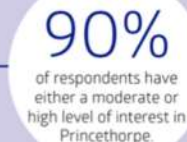
A quarter of all respondents undertake volunteer or charity work in their own time.



Industries employing the highest number of OPs.



Two thirds of respondents have been to a Princeshorpe event in the last five years.



Gifts in numbers

125
Donors

36
Regular
givers

£177,000+
for the Bursary
Campaign

80
pledges of support for
the Science+ Campaign

27
Elements
reserved

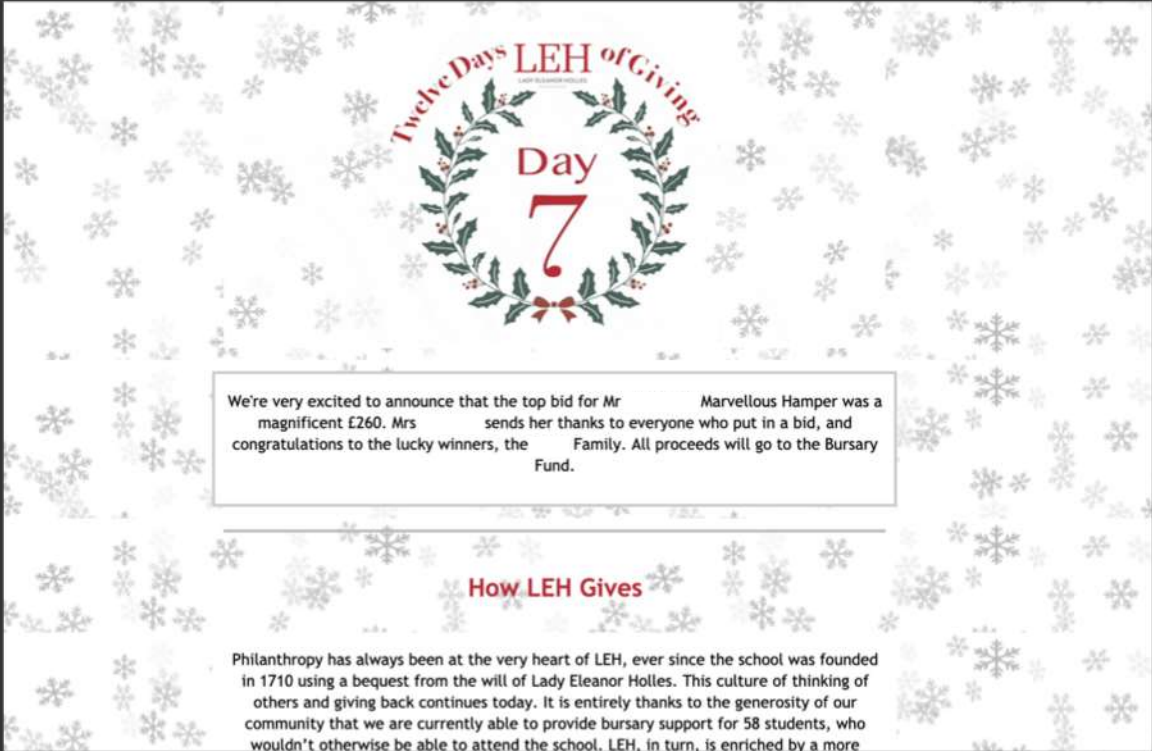
13
Pavers
reserved

14
Wall bricks
reserved

£5,500
donated by parents to
hardship bursaries

606
members of our
online community,
Princeshorpe Connect

LEH: The Twelve Days of Giving



Twelve Days LEH of Giving
Day
7

We're very excited to announce that the top bid for Mr _____ Marvellous Hamper was a magnificent £260. Mrs _____ sends her thanks to everyone who put in a bid, and congratulations to the lucky winners, the _____ Family. All proceeds will go to the Bursary Fund.

How LEH Gives

Philanthropy has always been at the very heart of LEH, ever since the school was founded in 1710 using a bequest from the will of Lady Eleanor Holles. This culture of thinking of others and giving back continues today. It is entirely thanks to the generosity of our community that we are currently able to provide bursary support for 58 students, who wouldn't otherwise be able to attend the school. LEH, in turn, is enriched by a more

Be Amazing, Donate Today



Set up a Regular Gift

Fill out this online form to set up a Direct Debit



Discuss your donation with us

Complete this quick form and we will be in touch to talk you through the options



Donate by Post

Click here to download a donation form



Donate Online

Click here to make a donation by credit or debit card securely online

Giving Day Success



Thank you to everyone who came together and supported our first Giving Day in October 2020.

You raised an amazing £31,970 for the Bursary Fund to support current and future bursary students.

Our U6th students who took to the phones to swap stories with Old Wacs and help us raise as much as possible. You can hear from them by tuning in to Episode 4 of CHS's own Ed.Podcast, wherever you stream from (Apple, Spotify etc). And don't forget to leave a review / star rating, it helps spread word of the students' brilliant achievements even further >> [Listen to the episode here](#)

Listen Now

**Using video to say thank-
you!**

Underused and Underrated!



Thank You Videos

<https://www.youtube.com/watch?v=aLG1o28O88g>

<https://www.youtube.com/watch?v=9EzcgWLOXxA>

<https://www.youtube.com/watch?v=WG8QbLvCREA>

<https://www.roathparkprimaryschool.co.uk/covid19-thank-you/>

<https://www.facebook.com/watch/?v=1131929403842601>

<https://www.youtube.com/watch?v=Y-3xe7fI5M8>

<https://www.churchofengland.org/more/media-centre/news/hundreds-schools-sing-virtual-thank-you-song-goes-viral>

<https://www.youtube.com/watch?v=A26VAClyCS0>



Stewardship on a Budget

- Handwritten cards/birthday cards/congratulatory messages
- Photographs
- Archive cuttings
- Gifts from other donors
- Telephone calls
- Tours of school
- Videos

Take-aways

Strategy is important

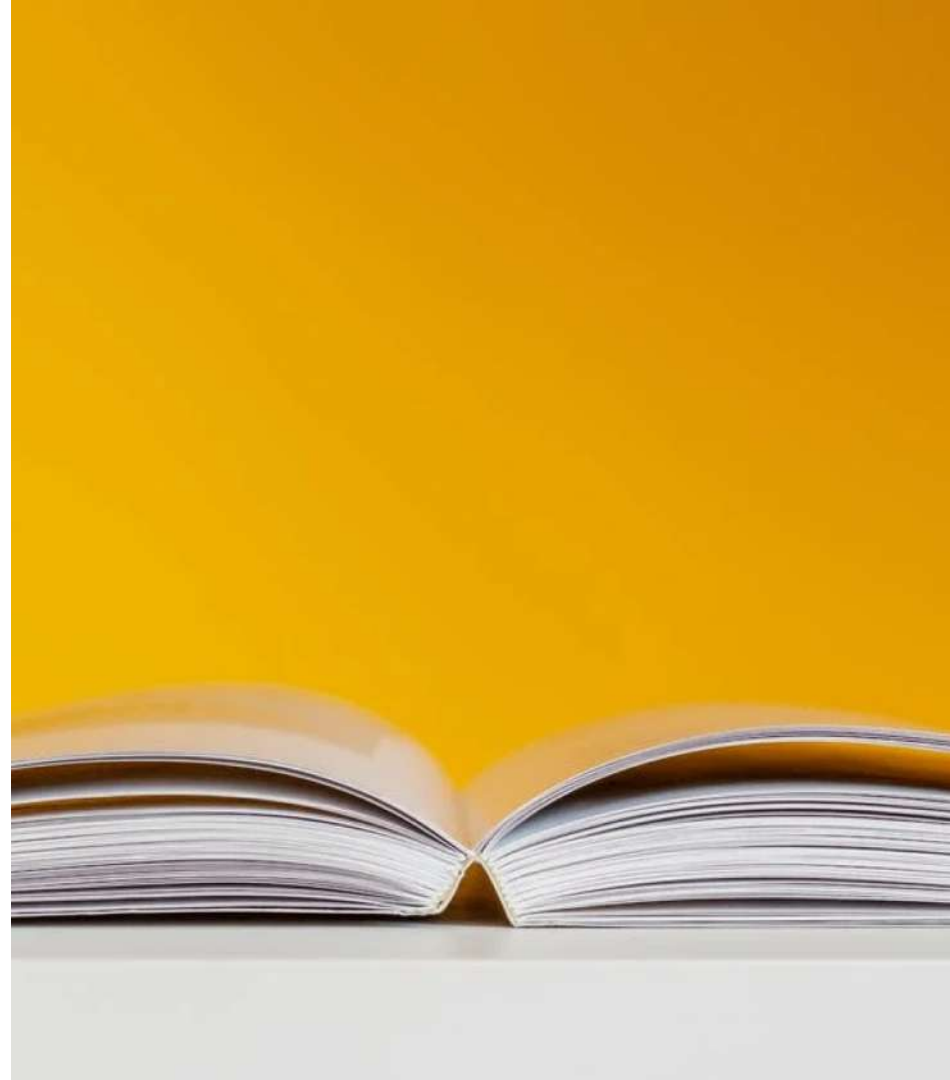
Don't go it alone!

Communicate, Engage, Recognize,
Show Impact

Ongoing not a one-off!

Make your database work for you

Use video!



Thank
you





RHL CONSULTING
MOVING SCHOOLS FORWARD

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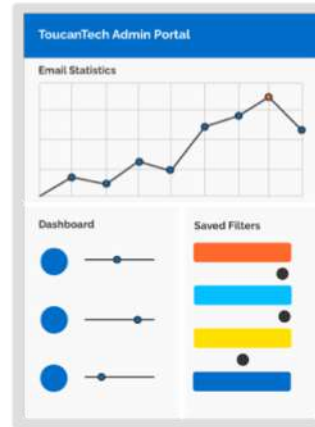
E: rachelhadleyleonard@outlook.com

www.rhlconsulting.co.uk



About ToucanTech

ToucanTech is an easy, affordable and beautiful fundraising CRM and website software to manage your supporter records, email newsletters, online payments, events, mentoring, careers and more!



Any questions?

Please contact Amy

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www.toucantech.com



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