




Texas Association of Community College Foundations 2017 Annual Conference

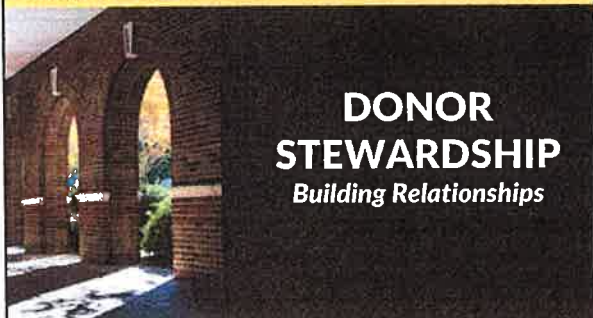


Shelby Gould

Director of Advancement Services
Chief Operating Officer for the TJC Foundation


Shelby joined TJC in 2004 and has multi-faceted experience across all areas of advancement and annual giving. In her current role, she oversees Foundation operations, strategy and implementation, donor relations, gift processing, scholarships and special events held in support of both the Foundation and TJC. Since 2010, she has been responsible for annual giving programs at TJC, including the employee campaign, fundraising for a major scholarship golf tournament and the President's Circle. Shelby also serves as a major gifts officer, with a special focus on securing gifts for annual and endowed scholarships. Prior to joining TJC, Shelby served as Unit Supervisor and Program Development Officer at Texas Tech University Health Sciences Center for six years. Shelby has broad-based knowledge of the sector with more than 18 years of experience in higher education administration. She has presented at national conferences for both CASE (Council for the Advancement and Support of Education) and the NSPA (National Scholarship Providers Association).

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DONOR STEWARDSHIP
Building Relationships


Presented by: Shelby Gould
February 16, 2017

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What is Stewardship?

"The term *stewardship* covers the administration of gifts and the overseeing, protection and care of your relationship with a donor to strengthen and preserve that relationship over time."

Fundraising Fundamentals, Section 7.10, CASE website

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Adequate stewardship
will allow your fundraising to survive.

Exceptional stewardship
will allow your fundraising to thrive!

Shelby Gould, 2017

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What will we cover today?

- Snapshot of Tyler Junior College
- Basic elements of stewardship
- Stewardship through scholarships
- Questions and group discussion

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SNAPSHOT OF TJC

- Founded in 1926
- 137-acre main campus
- Enrollment of 12,000 credit seeking students
- 120+ degrees and certificates
- 50+ clubs and student organizations
- Comprehensive collegiate experience



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SNAPSHOT OF TJC

- Supported by 1,900+ member alumni association
- Supported by Foundation with \$47M in assets; \$38M in endowment
- Raise an average of \$2.5M annually with approximately 900 active donors per calendar year
- Recognized with 2015 CASE Sustained Excellence in Educational Fundraising Award

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Acknowledgements
An IRS requirement; most basic stewardship

TJC Foundation policy

- Mailed preferably within 24 hours; no longer than five business days
- Established acknowledgement matrix
 - \$01 - \$99 Tax receipt with ED electronic signature
 - \$100+ Tax receipt / stewardship letter with ED's signature
 - \$1,000+ Stewardship letter with President's signature

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Sample Tax Receipt



Gift amount, designation and notification of receipt

General benefit to donor and institution

Benefit statement


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Sample Stewardship Letter

President's letterhead

- No gift amount, designation
- No benefit statement

President's personal note



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Exceptions to standard acknowledgement
(All receive standard gift type letter regardless of amount)

- Memorial and honorary gifts
- Matching gifts
- Gifts of goods and personal property
- Special initiatives

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GROUP DISCUSSION

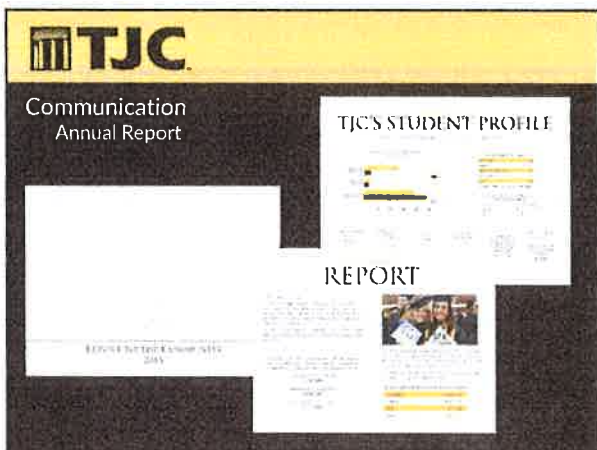
Share challenges and opportunities concerning acknowledgements.

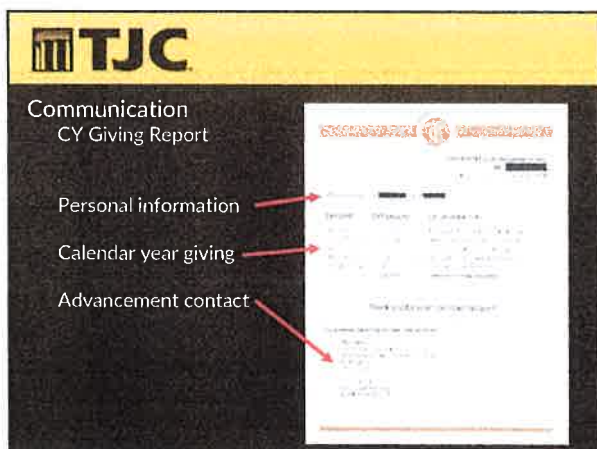
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Communication
Online newsletter for giving society





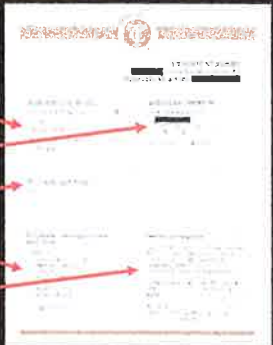




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Communication
Endowment Report

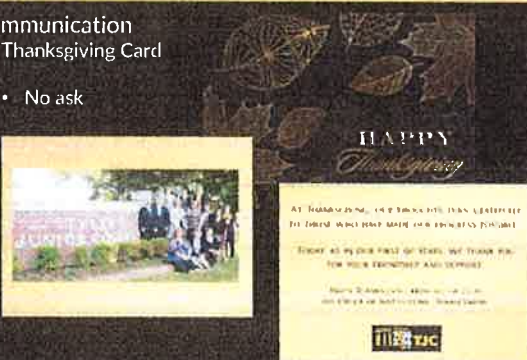
- Financial information
- Activities supported
- Outstanding pledges
- Advancement contact
- Spending policy



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Communication
Thanksgiving Card

- No ask



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Special Events









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Unique Opportunities



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GROUP DISCUSSION

Share unique stewardship opportunities that have been successful.

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Scholarships
TJC scholarship office centralized in Advancement

Advantages

- Physical location
- Open communication
- Realistic expectations
- Ownership of personnel
- Connection to stewardship efforts

Disadvantages

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Scholarships
 TJC specific stewardship plan for scholarship donors
 \$25k endowments and above
 Typically two-year scholarships

- Award notification packet (letter and recipient profile)
- Personal thank you note from student
- Scholarship luncheon
- Holiday card from student
- Second year notification (letter and update report)
- Final notification with student future plans

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Scholarships
 Stewardship timeline

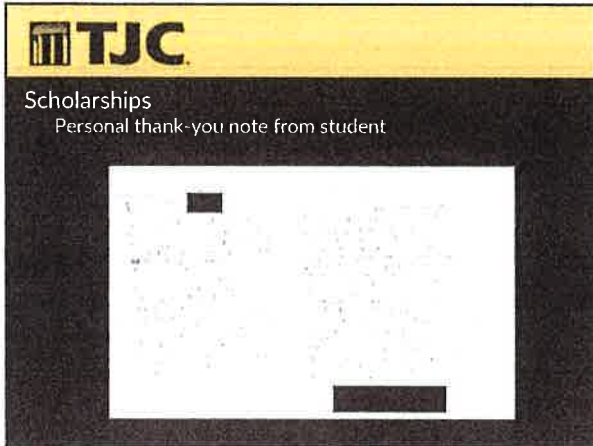
```

    graph TD
      A["JUNE / JULY  
Award notification w/  
student profile"] --> B["AUGUST  
Student personal  
thank-you note"]
      A --> C["NOVEMBER  
Scholarship  
luncheon"]
      A --> D["JUNE / JULY  
Second year notification  
w/ student update OR  
Final notification letter"]
      B --> E["DECEMBER  
Holiday card  
from student"]
  
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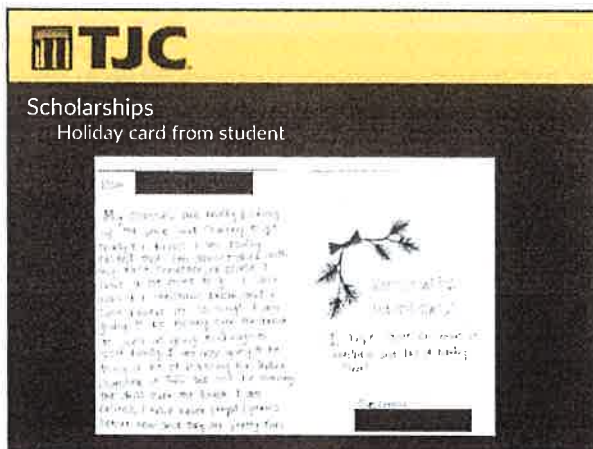
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Scholarships
 Award notification including
 1st year student profile

- Biographical information
- Personal interest
- Honors and awards
- Future goals
- Fun insights








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Scholarships
2nd year notification including student update


- Biographical information
- Future plans
- Career goals
- First year experience
- Fun insights



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Scholarships
Final notification including future plans for student

- Outcome from TJC
- Future plans
- Quote from student
- Final thank-you



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QUESTIONS
and
GROUP DISCUSSION
