

ICAA Conference

July 29, 1010

“Will you marry me?”

(and other proposals that really matter)

Terry Kurtz

Baldwin-Wallace College

Stewardship

Timing &
Presentation

Knowledge

Relationship

RELATIONSHIP

- Genuine
- You and the donor
 - Shared experiences, values
 - Trustworthiness, reliability
- The donor and the college/university
 - Current activities
 - Current students, faculty, staff
 - Memories, impact of institution on the individual

KNOWLEDGE

- Interests
- Passions
- Goals
- Life activities and plans
- Want to have an impact?
- What type of impact?
- “Tools” that might be of interest/benefit to donor (gift options)

TIMING

- Relative to *the donor's life*
- Relative to the college/university's activities
- *Suprisus minimus*



Actually, that would be
*ut pauci surprises ut
possible.*

PRESENTATION

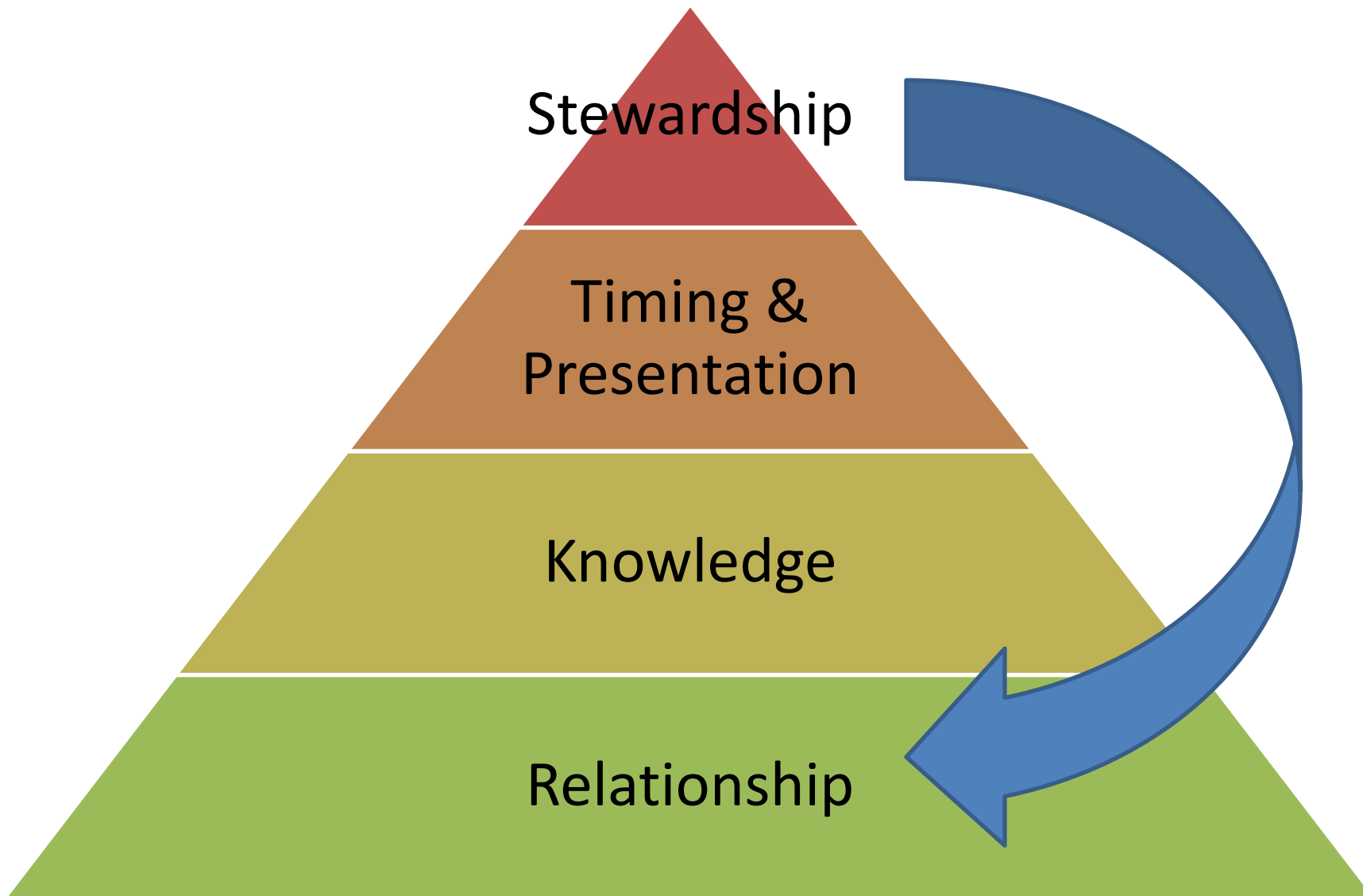
- Written considerations
 - Look and feel
 - Images
 - Readability
 - Flow
- Personal points to emphasize
 - Why this person?
 - Why this project?
 - Appreciation (demonstrate your knowledge)

STEWARDSHIP (of a “YES”)

- Immediate thanks
 - From whom?
 - Impact of gift
- Ongoing communications
 - Photos?
 - Student letters?
 - Invitations to campus?
- Celebration of project/program completion or annual life cycle of gift (*e.g.*, endowed scholarship)

STEWARDSHIP (of a “NOT NOW”)

- It’s decision time!
 - What are they really saying?
 - Where is your best resource investment?
- Acknowledgment
 - Timeliness
 - Message
 - Style (tone, format, type)
- Next steps (cultivation, letting go, hand-off)



Stewardship

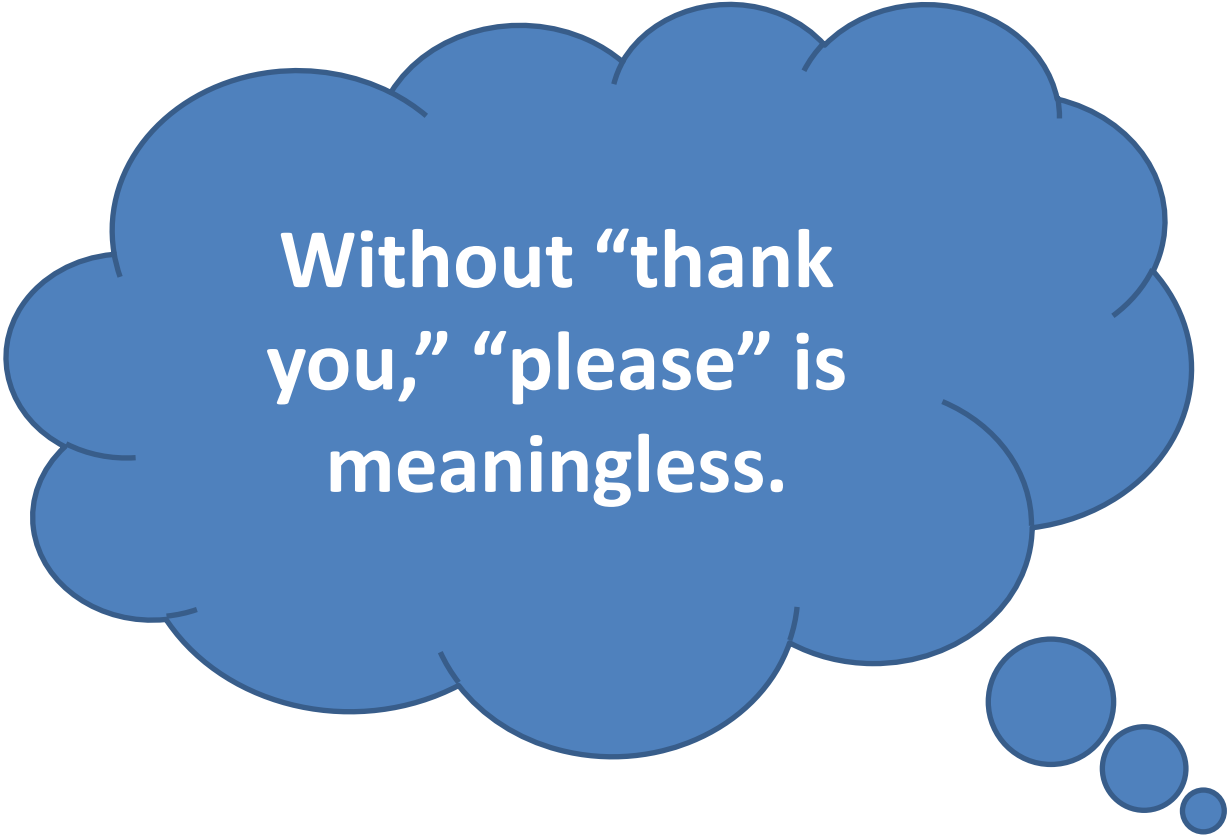
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Thank you.

Perhaps the most important words in the English language?



Without “thank you,” “please” is meaningless.

Call or write with questions...

Terry Kurtz

tkurtz@bw.edu

(440) 826-3170

(My birthday is September 1st...)