



**SCHOOL OF INFORMATION**  
UNIVERSITY OF MICHIGAN



# Mini-Stewardship Reports

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CASE Award submission abstract



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**TITLE OF ENTRY**

University of Michigan School of Information  
Mini-Stewardship Reports

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**CATEGORY TITLE**

**Fundraising: Fundraising Pivot** — Entries should demonstrate resourcefulness and creativity producing a single print publication that had noteworthy, measurable outcomes. The publication can be any size and for any purpose that advances the institution, including fundraising, student recruitment, or promotion of an institutional program or initiative.

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**INSTITUTION**

University of Michigan, School of Information

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**NAME AND CONTACT INFORMATION FOR INDIVIDUAL SUBMITTING ENTRY****Greg Powell**

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**NAMES OF ALL INDIVIDUALS RESPONSIBLE FOR ENTRY**

**Luis Escareño**, Stewardship Officer  
**Greg Powell**, Development Associate  
**James Reitz**, Multimedia Designer  
**Rebecca Pagels**, Executive Director of Development & Alumni Relations

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## GENERAL DESCRIPTION OF THE ENTRY

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At many institutions, stewardship reports are a fundamental component of good fundraising practices. However, these reports can be a heavy draw on time and resources. The School of Information (UMSI) at the University of Michigan saw an opportunity to streamline the stewardship reporting process to make broad reporting more feasible with limited staff and budgetary resources.

Using “mini-stewardship reports,” UMSI has been able to significantly expand the reach of reporting on fund impact. The UMSI Marketing & Communications team created a general template that the development team uses to create personalized reports. These reports are generated quickly and efficiently with meaningful content using elegant template designs and a merge system.

There are a variety of purposes for the mini-stewardship reports including:

- endowment reports
- stewardship updates
- fund description for events
- stewardship document used in conjunction with a solicitation

Additionally, the development team uses the report to steward multiple donors who have contributed to a fund, creating a personalized feel to a larger group of donors, as well as creating personalized reports for individual donors.

## METHODOLOGY AND STRATEGY

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**We asked volunteers and donors what information about their giving they would most like to see at a glance.** Each respondent had a different perspective, but common themes were: giving history, current endowment information, and information about students benefiting from their giving. Volunteers expressed that they didn't have an easy way to access information about their own giving history beyond the records they keep. We identified a need to compile all the information most important to donors into a single document.

**We recognized that the document needed to be flexible enough to display variable data,** and because of the personalized nature of the document, we needed a mechanism to create many of these documents without straining our staff time and financial resources.

**We started by looking at the information** from three different donors and envisioning on paper what information would be displayed. We found that there was a common design language that would work well when it came to displaying data. The design language would allow us to plug in our variable data via a mail-merge mechanism. We knew this could be accomplished via Adobe InDesign. We could display information in a beautiful design and still have the functionality of creating multiple documents with variable data at a click.

**We drew our mini-stewardship reports** on a piece of paper and outlined the need to our marketing and communication colleagues. The final report design made by the UMSI in-house designer was very similar to what was drawn on our piece of paper. They created an InDesign template that uses merged data that allows the Stewardship Officer to create the reports without further assistance from the multimedia designer. The design was made to be distributed as a PDF or as a print piece. The physical dimensions are a half sheet of paper that allows us to print off individual reports for donor visits and mailings using high-quality cardstock.

**We decided the best initial way to use the reports** was to create stewardship reports around specific funds. The projects coincide with the use of specific funds. For example, after an internship award is distributed, we collect quotes from students who received the fund and create personalized reports for each donor to that fund. As a result, we are able to create over 100 personalized mini-stewardship reports depending on the type of fund and purpose.

**Finally, we determined that our stewardship report could be customized** for purposes beyond the original use. As mentioned, our initial purpose was to steward donors. We then expanded the use of the reports to remind folks of their last gift in order to inspire a future gift. Additionally, we had a donor that wanted to set out information at her retirement party inviting people to give to her endowed fund. She used the mini-stewardship report to encourage them to make a contribution to her scholarship fund, and the report gave attendees an outline of the fund and its usage over the years.

# EXAMPLES OF REPORT

## Mini-stewardship report as an endowment report



### EVAN BLISS HEALTH INFORMATICS SCHOLARSHIP

Provides scholarship support to students pursuing a master's degree in the Health Informatics program. Established by Nancy (AMLS '68) and Donald Bliss, Kenlee Ray (AMLS '68) and Maureen Moore (AMLS '67) in memory of Evan Bliss.

“Now, not only am I getting a great education at UMSI, I have the financial freedom to choose the internship that's right for me – not just the one that pays the best, but the one that will serve me best in my future career. I can choose an internship that aligns with my values and goals.”

—Stephanie Zimmerman, Second-Year MSI

**2015**

Fund Established

**\$153,910**

Gift Totals

**20**

Total Numbers of Donors Lifetime

**\$153,604**

Book Value

**\$161,923**

Market Value

As of August, 2020

# EXAMPLES OF REPORT

## Mini-stewardship report as a stewardship update



### UMSI STUDENT EMERGENCY FUND

During the difficulties of the past months donors, like you, helped to meet the challenges faced by many students in our community due to unforeseen financial hardships. With your help, we've distributed over \$29,000 to students facing housing, and food insecurity, as well as students who are struggling to acquire the resources they need to succeed in a virtual world. An additional \$23,000 has been raised to help students during the fall 2020 semester.

*"I was forced out of my home in the middle of the pandemic. The Student Emergency Fund gave me an opportunity to travel back to a stable living situation on campus. I was able to secure housing and food. I'm grateful for the support, which has helped to lighten a significant financial and emotional burden.*

—Christopher Coreano, MHI, 2021

**\$52,432**

Gift Totals (Lifetime)

**113**

Number of Donors

**138**

Number of Gifts

**\$29,322**

Total Funds Distributed

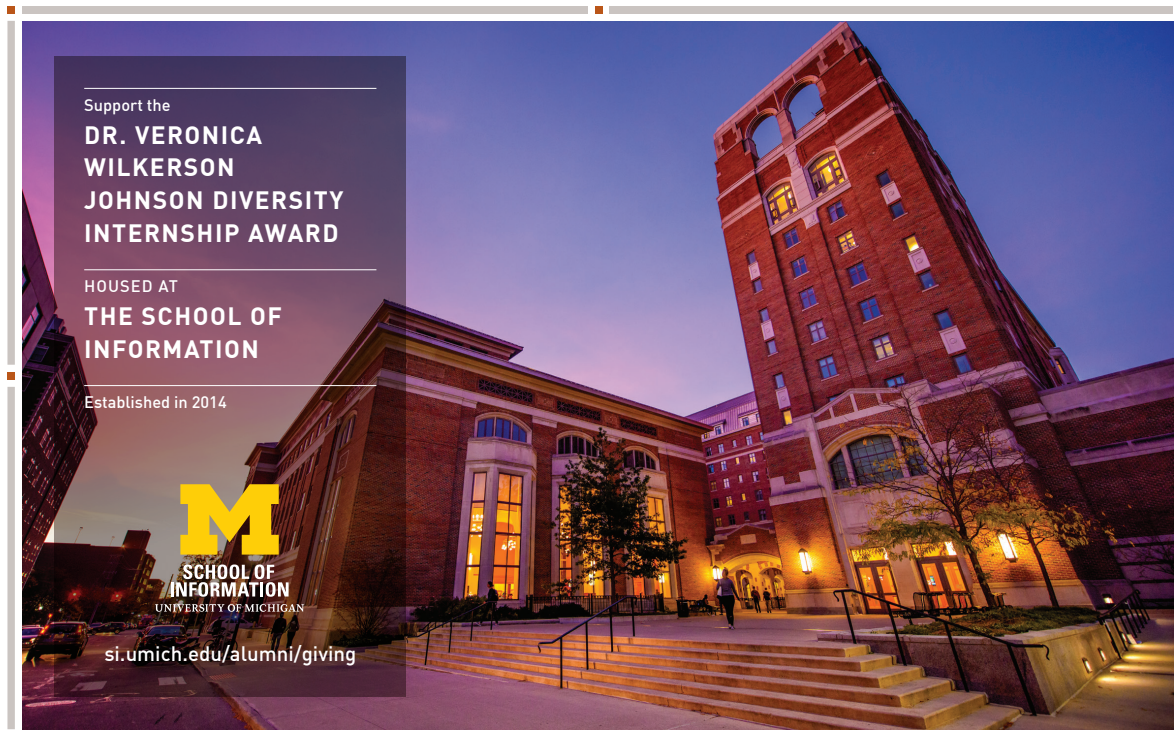
**31**

Number of Students Receiving Support

As of August, 2021

# EXAMPLES OF REPORT

## Mini-stewardship report as a fund description for events



### DR. VERONICA WILKERSON JOHNSON DIVERSITY INTERNSHIP AWARD

#### About the Fund

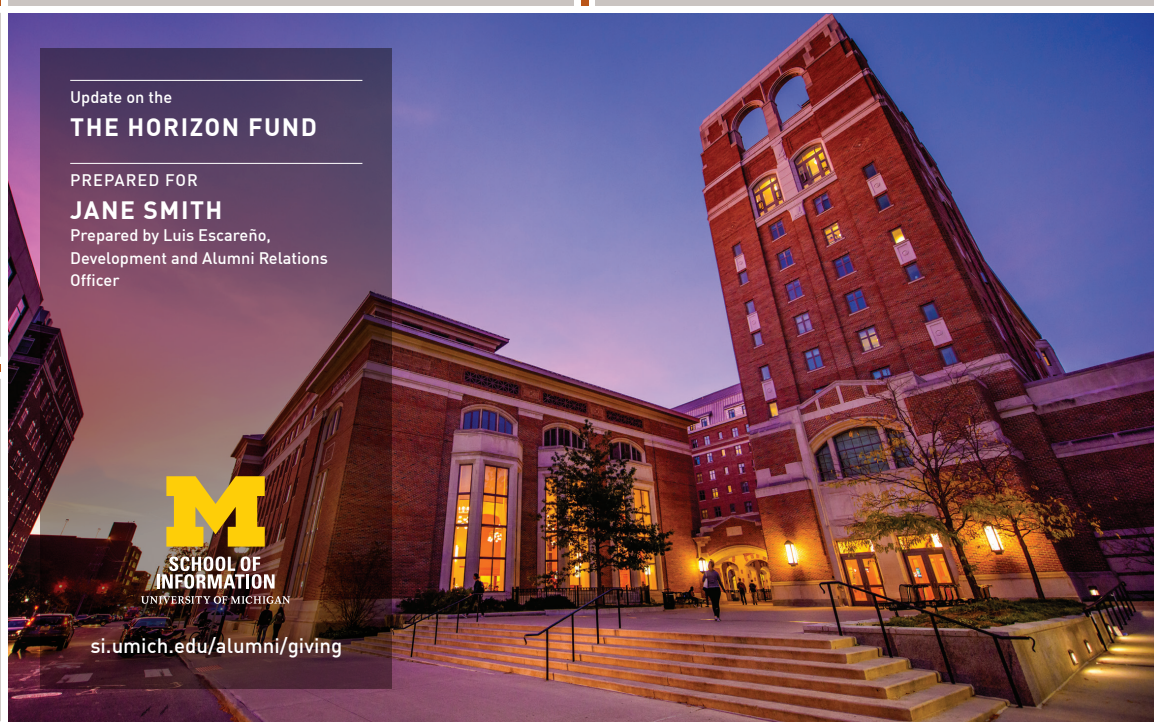
On July 12, 2018 U-M School of Information presented the Dr. Veronica Wilkerson-Johnson Diversity Internship Award to Desiree McLain. Desiree McLain (MSI '18) earned her bachelor's degree from the University of Michigan with a focus on Women's Studies, AfroAmerican and African Studies, then pursued a master's degree from the U-M School of Public Health, where she completed a Health Informatics Certificate. Her internship at Atlantic Impact allowed Desiree the opportunity to work with Detroit high school students and to introduce them to innovative career opportunities that they may not have otherwise known existed.

"I am so very thankful to Veronica for her special gift! With her assistance, I was able to work at an exciting internship that provides Detroit high school students with life-changing study abroad and entrepreneurship experiences. Atlantic Impact is a Detroit-based nonprofit that uses field trips to expose youth to innovative career opportunities. In my internship there, I assisted them in securing their website so that their mission could reach a broader audience, and strategizing ways to go paperless with their documentation. This allows them to capture important metrics and quickly tell their story to their funders. This results in them securing funding and broadening their reach, increasing the number of students that impact."

— Desiree McLain, MSI 2018

# EXAMPLES OF REPORT

## Mini-stewardship report as a a stewardship document used in conjunction with a solicitation



### THE HORIZON FUND

The SI Horizon Fund provides financial support to School of Information students pursuing educational experiences that take place outside of the classroom that enhance their classroom learning. These experiences may include but are not limited to, travel, internships, and service engagement experiences.

“The Horizon Fund gave me an opportunity to compete in a national web design competition. My team and I created an accessible and fully functional website for a nonprofit client and we placed in the top three in our category. I always wanted to leverage my education for social impact, but I didn’t think we would be able to have an effect in such a short period of time.”

—William Kim, MSI, 2021

**3/1/18**

Date of Last Gift

**\$500.00**

Last Gift Amount

**11**

Total Number of Donors in FY19

**35**

Number of Gifts in FY19

**4**

Number of Students Supported in FY20

As of April 30, 2020



## DOCUMENTED RESULTS, MEASUREMENTS OF EFFECTIVENESS

Our goals are to connect with donors at all giving levels, steward gifts, and encourage repeat and larger gifts.

We do not want to reserve personalized stewardship for major gift donors, but include donors of all giving levels to show their impact. Because of limited staff and resources, we do not have the ability to have direct conversations with every donor. The mini-stewardship reports are an entry point to communicating with donors that have made gifts at lower levels and who might not normally hear from a gift officer. We have had contact with donors that we had not heard from in years as a result of these stewardship reports.

We measure success in the following ways: number of donors reached, number of donors who respond to the mini-stewardship report, and additional gifts received in response to the mini-stewardship report. For example, our first test resulted in the following:

- We sent **112 Mini-Stewardship Reports** to donors of the “Horizon Fund”
- We heard back from **37 donors** with gifts to this fund ranging between \$20-\$1,000. Many of these donors do not receive regular communication
- Of the 37 donors, **five made a gift of a higher amount** than their previous gift without any form of solicitation present in the communication.

A second way that we measure success is by engaging top donors through a customized report that includes information in a more traditional endowment report, while incorporating design elements from the mini report. For example, a gift officer used the stewardship report to provide information to a donor about her endowed fund. Following this engagement, the donor made a new **five-figure cash pledge** to the fund and is considering a **six-figure bequest**.

## TOTAL NUMBER OF PROFESSIONAL AND SUPPORT STAFF WHO WORKED ON THE PROGRAM

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### Professional staff: 2

#### **Luis Escareño**, Stewardship Officer

We began with calls to 10 different donors. The conversations were used to gauge what information was most needed/wanted. The Design phase took only 2 hours to complete, and the implementation is ongoing. The Stewardship Officer spends a few hours every month putting together reports for distribution. They are mail merged and then are distributed via email using a mail merge mechanism as well. Periodically a piece is printed and mailed.

#### **James Reitz**, Multimedia Designer

The multimedia designer was only responsible for creating a template. The multimedia designer spent 3 hours putting the content together, including over 24 options for covers that change the look of the report, so a redesign of the report would not be needed for a few years.

## PROGRAM BUDGET AND UNIT COSTS WHERE APPLICABLE

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No extra budget is allocated to this project beyond periodic mailing costs. Instead the project is made using resources already available. Printing is done in-house. All employees at the University of Michigan have access to a license of the Adobe Creative Suite.

