



THE ARCHDIOCESE
OF KANSAS CITY IN KANSAS

Sustainable Stewardship to keep Donors Coming Back

Year¹ after Year

Presented By : *Lisa McKelvey*

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OVERVIEW

- Review what you are doing right now
- Review the basics of a good Donor Stewardship Program
- Learn the steps to take to get there
- What can you implement immediately
- What can you set a goal to implement in the next 12–18 months

AGENDA

- 1. Intro**
- 2. Starting Point, where are we all?**
- 3. What is a Stewardship Program**
- 4. What are the basics that everyone should be doing?**
- 5. Where to start?**
- 6. We are doing the basics, how do we grow?**

INTRODUCTION



- Moved to ArchKCK in May 2024
- Originally from Stillwater, OK
- Attended OU for Undergraduate, St. Mary, MN for Masters in Philanthropy and Development
- Holds CFRE Certification since 2021
- Previously worked at the Archdiocese of OKC and Diocese

Starting Point

- Where Is everyone on their stewardship journey?
- Question 1 – How do you view Stewardship?

4 Pillars of Stewardship

Stewardship

All things are possible with God



Devote Time



Share Talent



Give Treasure



A way of life

- Hospitality
- Prayer
- Formation
- Service

What is a Stewardship Program

Stewardship Program

- Stewardship Program supports all aspects of fundraising, community engagement, events, publicity, etc
- Stewardship Program supports your message and ministry
- It continuously grows and evolves

Stewardship Program

- A stewardship program is NOT something you do once and never again
- A stewardship program DOES NOT work in a vacuum
- It is NOT once size fits all
- It is not static

Basics

Stewardship Program

- Hospitality
 - Thank those who have supported us and welcome and thank quickly those new supporters
- Prayer
 - How are we incorporating prayer into stewardship
 - Add donors and benefactors to your prayers of the faithful for school masses
 - Pray for your supporters publically around your students
- Formation
 - Are your family, alumni, friends, parishioners informed about how they can support you in time, talent, and treasure?
- Service
 - We know that giving and involvement in a community is directly correlated to their financial support
 - Invite donors who you think could be more supportive to tour, volunteer, mentor, get involved in a different way than they already are and see the impact they will have by growing closer to your ministry

Basics

- Question 2 – When do you send a thank you note?

Thank you letters

- Send as quickly as you can without making an error
- Personalize it!
- Make it organization specific
- Ideal is 1-3 Business days
- Online gift automatic email does not replace thank you note!

*Thank
you*



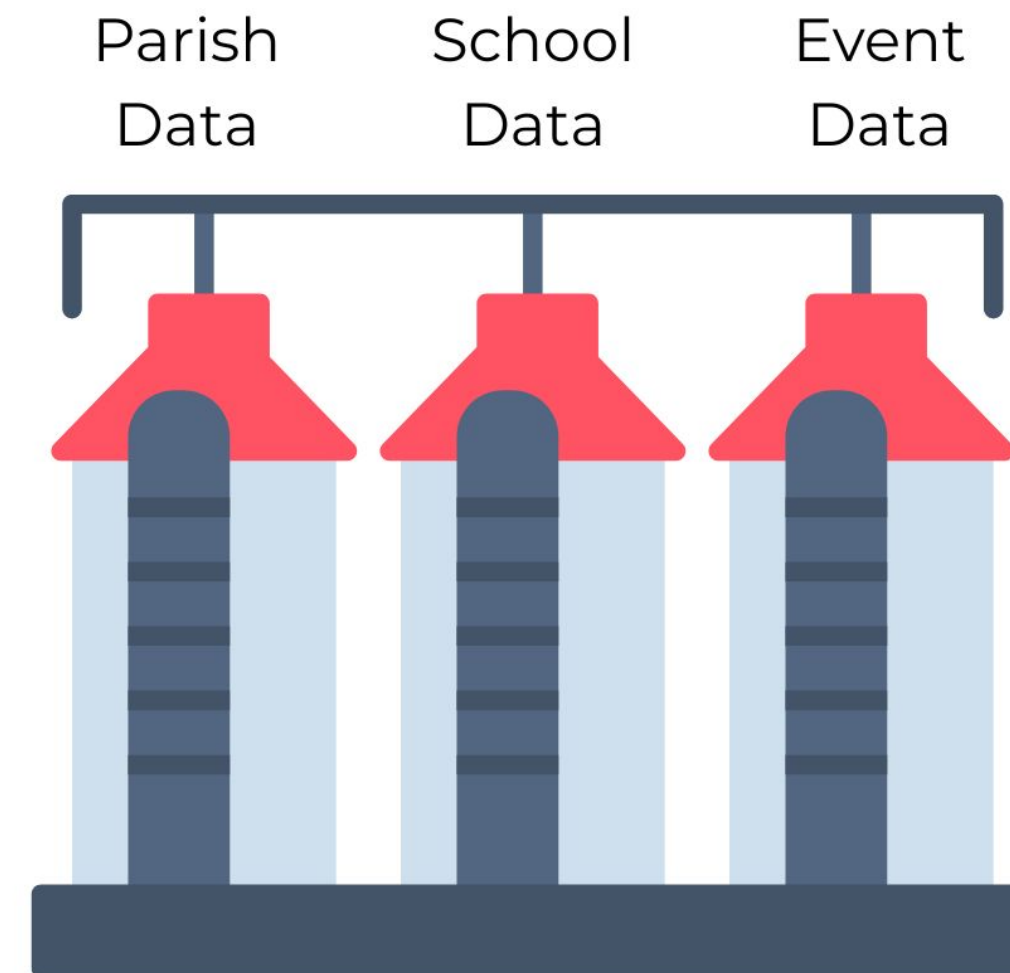
Personalize

- Does your letter or email read “Dear Friend of _____” Or just Dear Friend or Hello?
 - Merging the recipients name will give you a big boost in responses
- Tell your organization’s story to the right people at the right time
 - The email that goes out to current families should not be the same content that goes out to alumni or the content that goes out to the parish families who support you from the pews but don’t have any children in the school
 - All of this is separate from prospective donors vs current donors vs former donors
- For Events, how do you follow up after an event?
 - Make sure that follow up email aligns with who is receiving it.
 - The donor who bought a table and made a gift that night, should NOT receive another ask, just a celebration
 - The guests at that donor’s table who learned about your school for the first or second time but haven’t made a gift should be thanked for attending and given a link to give
 - Those who previously have attended but didn’t make it AND did not give a gift, should get a highlights of the evening and an invite to give

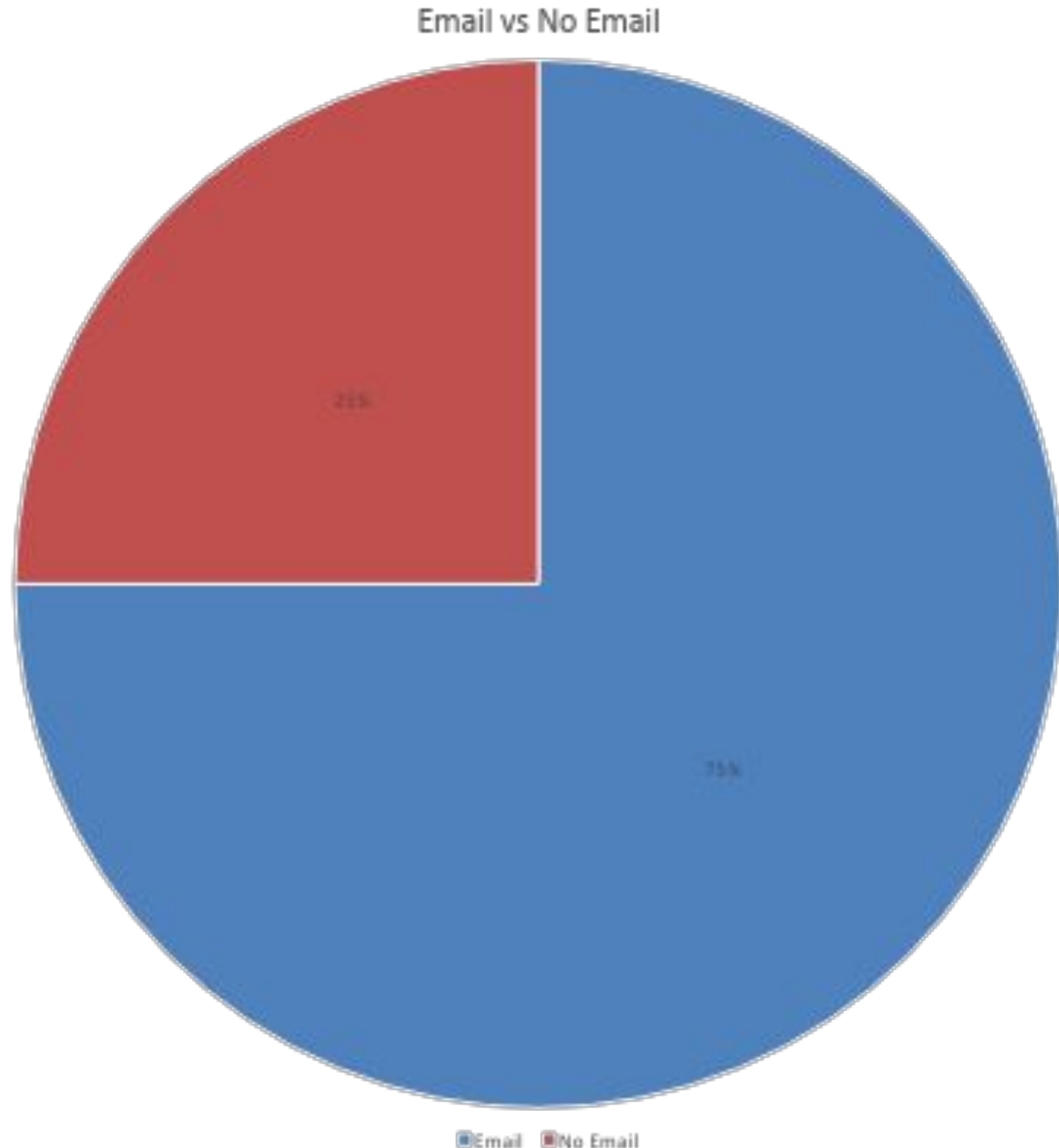
Where to Start?

Where is your data?

- How many database's house your constituent info
- Is data updated in all systems if it is updated in one?
- Donor gives you a new email at the event, does that email get out of the event auction software and into your donor database so they can continue to receive great stories from your school?



Email



- **75% of your Donors should have an email on file**
- **You should also have emails from anyone else who supports you at events, volunteers, or is connected with your organization?**
- **If you don't have this many emails, look at your online giving forms, your registration forms, your commitment cards, and your data**

Recurring Gifts



Avg Monthly Gift



Avg One Time Gift

Recurring Gifts



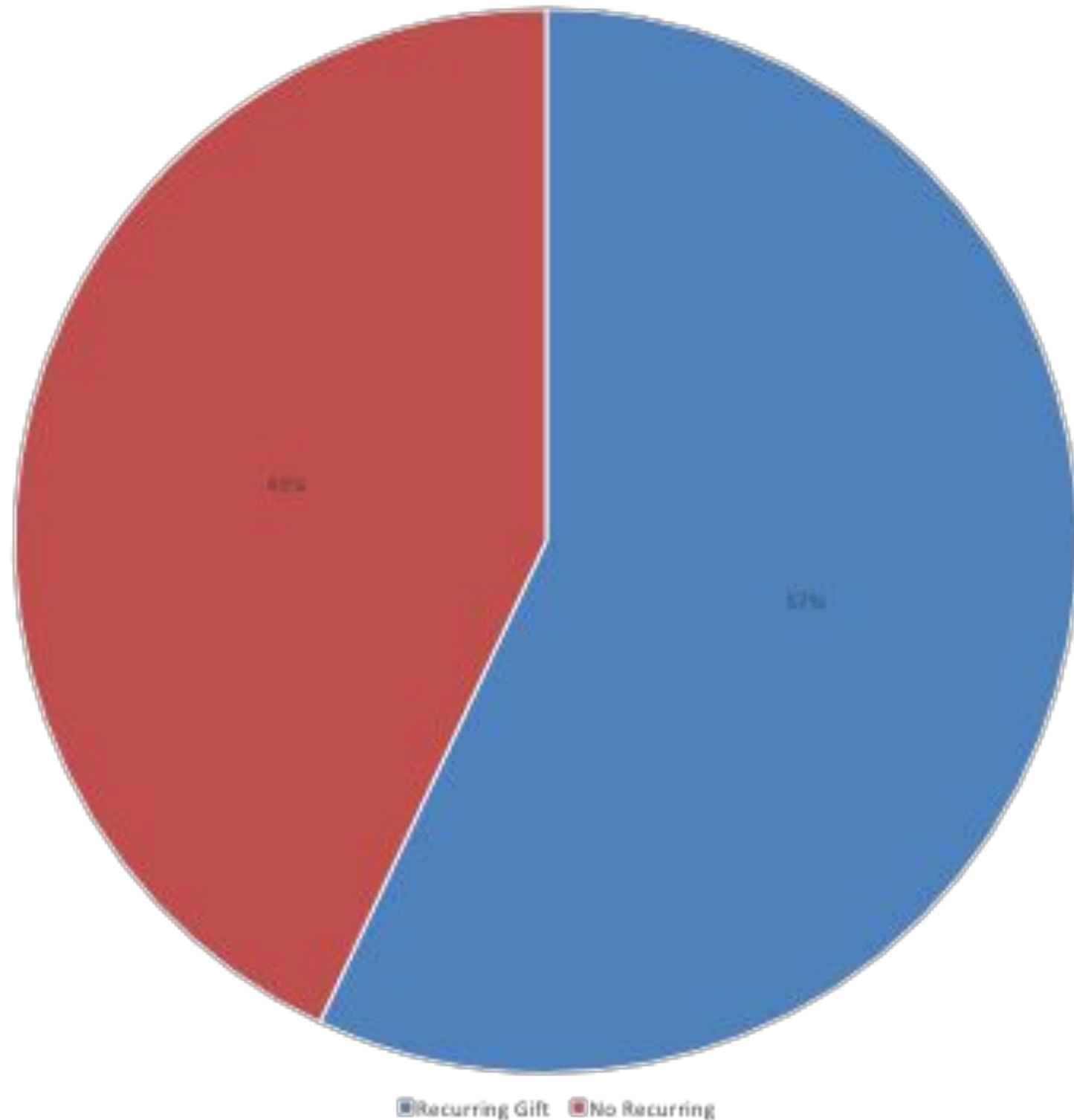
Avg Monthly Gift x 12
Months



Avg One Time Gift

Recurring Gifts

Recurring Gifts



- **57% of your donors are giving a recurring gift somewhere, why not to your organization?**

What to Include?

- Thank you letters
- Newsletters
 - Impact stories, what the donor is doing by their support be it time, talent, or treasure
- Emails
 - Tell your story in real time, in bite size pieces, it doesn't have to be perfectly polished
- Use your tax letter at end of year as an additional Thank you!

We are doing the basics,
how do we grow?

What's Next

- You are doing the basics, and want to do more
- First, be really good at the basics so that nothing stops when you start doing more
- Evaluate if you have the bandwidth, capacity, budget and staff to do more

What's Next

- Start doing some one on one meetings and solicitations
- Small group townhalls, a time to invite constituents to learn more about the ministry, ask questions, get involved
- Tours, open house, not for prospective students
 - Scheduling the first Thursday of the month for 5 couples to join the school for Mass and then coffee and pastries with the principal and pastor, end of the year you have 45 couples you have met with and invited to get more involved.
 - Maybe its Holy Hour, tour, and Lunch, etc

Next Steps for Growth

- Annual Appeal –
 - Check out OSV & Rich Fisher's session from yesterday
- Stewardship emails from the Principal or Director of Development or Pastor
 - Drop in notes, update from the week, celebration this week because...
 - Looks like its unplanned, but sent very regularly
 - If you aren't getting these emails from me with a ministry impact story and not ask, email me and I will add you to my emails

Next Steps for Growth

- Development Director
 - Don't expect them to pay for themselves in the first year, it takes time to build relationships
- Major Gift Office & A Major Donor Portfolio
 - A Major Gift Officer can only handle about 100-150 prospects at a time.
 - A Major Gift Program takes time to build.
 - This will not be a solution for a current \$1M deficit but if you are stable and healthy and want long term growth, this is good
 - MGO is personally stewarding these donors to grow larger gifts of support
- Are you ready for/ Do you need a capital campaign
 - Take it as an opportunity to grow relationships, grow involvement, grow education about your ministry and thus a way to build stewardship

ANY

QUESTIONS?

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Contact Information

FEEL FREE TO REACH ME ANYTIME.



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THANK

YOU!
