Stewardship Recipients

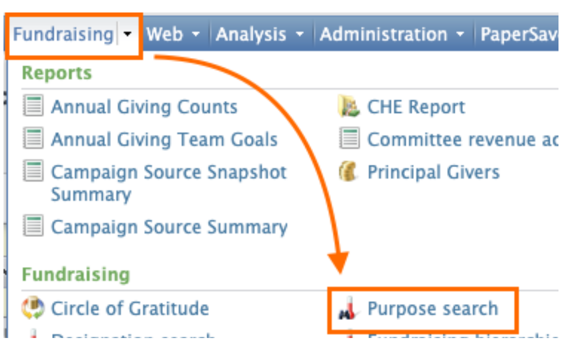
Central Donor Relations Best Practice Guide
Last Update: 03/11/2024

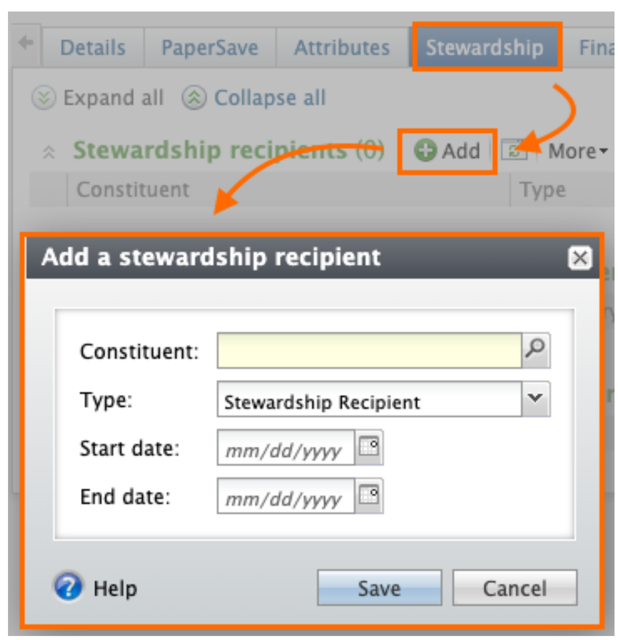
A Stewardship Recipient is a constituent or group of constituents designated as a fund's main contact(s). Stewardship Recipients are typically the fund's original signer(s) and/or official representative(s) approved to receive fund-specific financial and stewardship communications. Stewardship Recipients may receive a variety of fund-related communications and stewardship experiences depending on the fund category and use code.

ADDING STEWARDSHIP RECIPIENTS TO A RECORD

The Office of Central Donor Relations adds, updates, and maintains Stewardship Recipients in CADENCE, as appropriate for each fund. To add or update Stewardship Recipients:

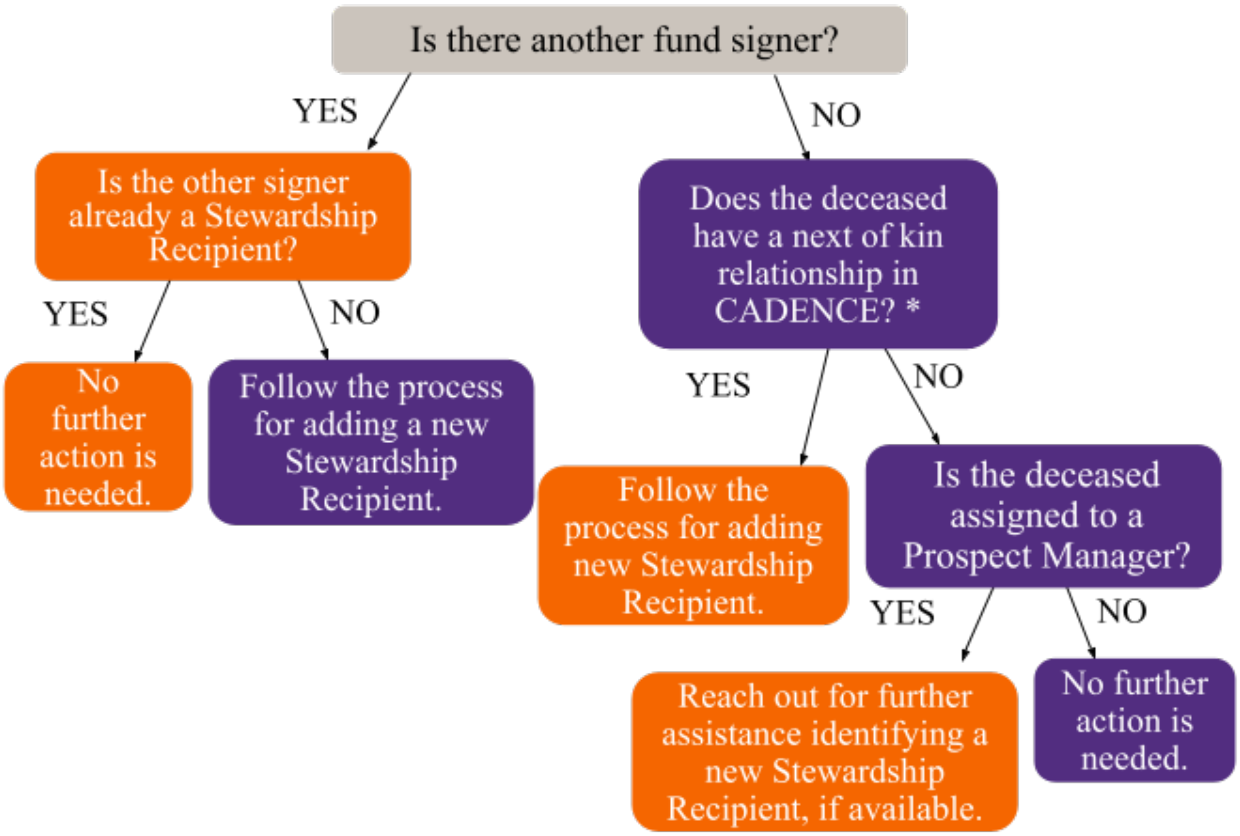
- **OPEN** the fund's Purpose record.
- **NAVIGATE** to the Stewardship tab > Stewardship recipients section.
- **CLICK** + Add.
- **FILL IN** Constituent.
    - **NOTE:** It is OK for a fund to have more than one Stewardship Recipient at a time.
    - **NOTE:** Do NOT add Household records as Stewardship Recipients.
- **FILL IN** State Date.
    - **TIP:** State Date will either be the date listed on the fund agreement (new funds) or the current date (new/updated Stewardship Recipients).
- **SAVE.**





DECEASED STEWARDSHIP RECIPIENTS

An End Date should be added when a Stewardship Recipient has been recorded as Deceased. This practice will ensure they are removed from future stewardship mailings. Follow this decision tree to see verify if a new Stewardship Recipient should be added to the fund:



* **NOTE:** Do not add personal relationships as a new Stewardship Recipient if the fund was established by a donor group (e.g. a class gift, Clemson Club, etc.) or company. Exceptions may be applicable if the new Stewardship Recipient is directly tied to the fund and written permission has been given. For company-created funds, the new Stewardship Recipient will typically be the individual who is in the position the deceased signer held.

ADDING 'CLEMSON DONOR RELATIONS' AS A STEWARDSHIP RECIPIENT

Clemson Donor Relations (T1188634) may be added as a Stewardship Recipient to funds requiring special handling. Use examples include anonymous donor who wishes select stewardship, internal stewardship contact(s), pooled funds where steward is valuable, etc.

- **IMPORTANT**: Always **ADD** a NOTE under the Documentation tab when adding Clemson Donor Relations as a Stewardship Recipient.

- **TYPE**: Donor Relations Internal Notes
- **TITLE:** CDR Stewardship Recipient Notes
- **NOTES:** Include reason(s) why 'Clemson Donor Relations' was added as a Stewardship Recipient. If known, include any special handling instructions.