

Building a Culture of Stewardship: How Involvement Leads to Investment

Michael J. Barvick, Senior Partner





Michael Barvick

Senior Partner

- 30 years in Advancement leadership
- Raised over \$400 million in gifts
- Broad advancement experience across key sectors
- Focus on classical Catholic schools and universities

“A Grounded
Theory Study
of Major Gift
Fundraising
Relationships in
U.S. Higher
Education”



IUPUI

INDIANA UNIVERSITY

Lilly Family School of Philanthropy

5 Qualities of Excellence in Fundraising

- 1 Effective Communication
- 2 Shared Values
- 3 Donor Centered
- 4 Professionalism
- 5 Ethical



Effective Communication

- 1 Consistent – Out of Sight, Out of Mind
- 2 Timely – Relevant, Acknowledgments
- 3 Personal – Salutation, References
- 4 Impactful – How are They Making Impact

Communications Calendar

Summer: Stewardship & Preparation

- **July:** Send a thank-you email or postcard to all prior-year donors. Post an infographic on social media highlighting the impact of last year's giving.
- **August:** Publicly announce the upcoming Annual Fund goal across digital channels. Finalize and print campaign letterhead, envelopes, and reply devices.

Early Fall: Kickoff & Leadership Phase

- **September:** Distribute the Annual Report of Gifts or Fall Magazine to all constituencies. Send the Parent Phase Kickoff letter and email. Host public launch of Annual Fund with Faculty and Students.
- **October:** Deploy segmented Renewal Solicitation #1 and Lapsed Donor Solicitation #1 via letter and email to Alumni, Parents of Alumni, and Friends.

Late Fall: Broad Solicitations & Year-End Tax Planning

- **November:** Mail a specific solicitation letter to Grandparents. Execute digital communications for Giving Tuesday. Utilize "Year-end Tax Giving" brochures or inserts in scheduled mailings. Host Thank You Reception for all \$1,000+ donors.
- **December:** Send Renewal Solicitation #2 and Lapsed Donor Solicitation #2. Deploy Non-Donor Solicitation #1 to constituencies that have never given or have not given in 5+ years. Utilize a donor match to inspire urgency and a deadline for year-end donors.

Communications Calendar

Winter: Follow-Up & Mid-Year Updates

- **January:** Mail IRS tax receipt letters to all previous calendar year donors by January 31st. Send Class Agent letters to enlist alumnae support and participation. Distribute a PR update on the campaign's progress.
- **February:** Host Thankathon with volunteers and students to thank all donors from previous calendar year through phone calls, emails and personal notes.

Spring: Final Appeals & Matching Gifts

- **March:** Send Renewal Solicitation #3 and Lapsed Donor Solicitation #3.
- **April:** Mail a targeted Matching Gifts letter to all eligible constituents. Launch the Senior Giving Campaign and Alumni Campaign via letter and email.

Year-End: Closing the Fiscal Year

- **May:** Send targeted LYBUNT (Last Year But Unfortunately Not This) and SYBUNT (Some Year But Unfortunately Not This) letters emphasizing the need to renew their support. Distribute a final "Annual Fund Notes" impact report and coordinate a PR blitz if the campaign reaches its goal early.
- **June:** Mail the Annual Gifts "Proof Letter" listing all donors to date, encouraging those not listed to make a gift before the fiscal year closes. Send Renewal and Lapsed Donor Solicitation #4. During the final week of June, execute a final push using email reminders and social media posts.

Shared Values

- 1 Catholic – Mission & Brand
- 2 Personal – Authenticity vs AI
- 3 Excellent – Investment
- 4 Impactful – Energize



Donor Centered

- 1 The Hero's Journey
- 2 Case Statements
- 3 Personal
- 4 Flexible



1

Problem Needs to be Solved

2

Donor Desires to Solve it

3

We are their Obi Wan

4

Donor Follows our Guidance

5

Donor is the Jedi!



Donor Centered

- 1 The Hero's Journey
- 2 Case Statements
- 3 Personal – CRM
- 4 Flexible – When, How, What



Case Statement/Donor Reports



Professional

- 1 First Impressions
(emotional/rational)
- 2 Programs
- 3 Events
- 4 Stewardship
- 5 Invitation



Ethical

- 1 Discretion
- 2 Use of Funds
- 3 Audits/Annual Reports



Takeaways

- 1 ABC – Always be Communicating
- 2 Lead with Mission and Shared Values
- 3 Your Donors are the Heroes
- 4 Be Catholic and Excellent
- 5 Virtue and Character aren't Just for Your Students
- 6 Donors Give to What they Help to Create

Q&A



National Advancement Summer Institute for Catholic Schools

June 28 – July 1, 2026 | Chicago, Illinois

Different city, same great experience. Join us in Chicago!

partnersinmission.com/pimsi26



Contact Us



Michael Barvick

Senior Partner

202-615-8911

mbarvick@partnersinmission.com



partnersinmission.com



THANK YOU

Q&A

