Annual Stewardship Letters

The annual stewardship letters inform stewardesses of the Library’s reportable endowed funds that their digital bookplates have been updated with acquisition and other information from the most recent fiscal year. It also contains a brief update of the Library’s activity and achievements from the past year. The objectives are to express our gratitude and to keep them engaged with the Library by demonstrating the positive impact of their past gifts.

Timeline (with approximate dates)

Immediately after the end of the fiscal year (July 15)

• Meet with Finance, Web Services and Technical Services to discuss populating the digital bookplate database and to identify any potential issues.

3 months before (August 15)

• Using the list that Finance can access from the Controller’s Office, upload current information about funds’ income to the database. Determine any endowments that need to have bookplates made for them (i.e. that have just begun to produce income).

• Using the bookplate admin site (http://dl.lib.brown.edu/bookplates/admin/) create those pages and images.

• Begin assigning books.

• Begin work on funds that are not acquisition based (e.g. preservation and operations). A paragraph for each fund should be produced.

2 months before (Sept. 15)

• Run report – U Library - Stewardees in Advance to retrieve the list of stewardesses of the Library’s reportable funds.

• Identify any stewardesses to whom the Library wants to send more personalized letters.

• Touch base with the Stewardship in Advancement regarding the list of stewardesses and if any of them will be receiving special letters from that department.

• Continue to meet with Finance, Web Services and Technical Services to keep track of progress.

• Draft the stewardship letter.
1 month before (Oct. 15)

- Continue to meet with Finance, Web Services and Technical Services to keep track of progress.
- Update non-acquisition endowment bookplate pages.
- Print off financial reports for all of the funds using report - U Library – Finance All in Advance.
- Finalize general stewardship letter.
- Write expanded letters to those on the personalized list.
- Merge the list of stewardees with a dump for the digital bookplate database so that the appropriate URLs are attached to their stewardees. This is the Excel file that will be used to do the mail merge.
- Book assignment is completed. Review the digital bookplate pages for accuracy and completeness.

2 weeks before (Nov. 1)

- Send an email to Advancement fundraisers with the list of stewardees receiving the letter and the text of the letter being sent.
- Print off general and personalized letters. Date the letters at least two weeks forward to give University Librarian (UL) time to sign them.
- Have UL sign the letters.
- Assemble stewardship packages including letters, financial reports, other materials is desired and envelopes.

The mailing (Nov. 15)

- Stuff and review for possible problems.
- Seal and mail.
- Have an announcement posted on the Library homepage with a direct link to the digital bookplate site.
1 week after (Nov. 22)

- Meet with Finance, Web Services, and Technical Services to review process and outcomes.
- Send an excel file to Advancement Services with the names of the stewarrees and contact reports info so the contact reports can be uploaded en masse into Advance.
- Share responses with the group.