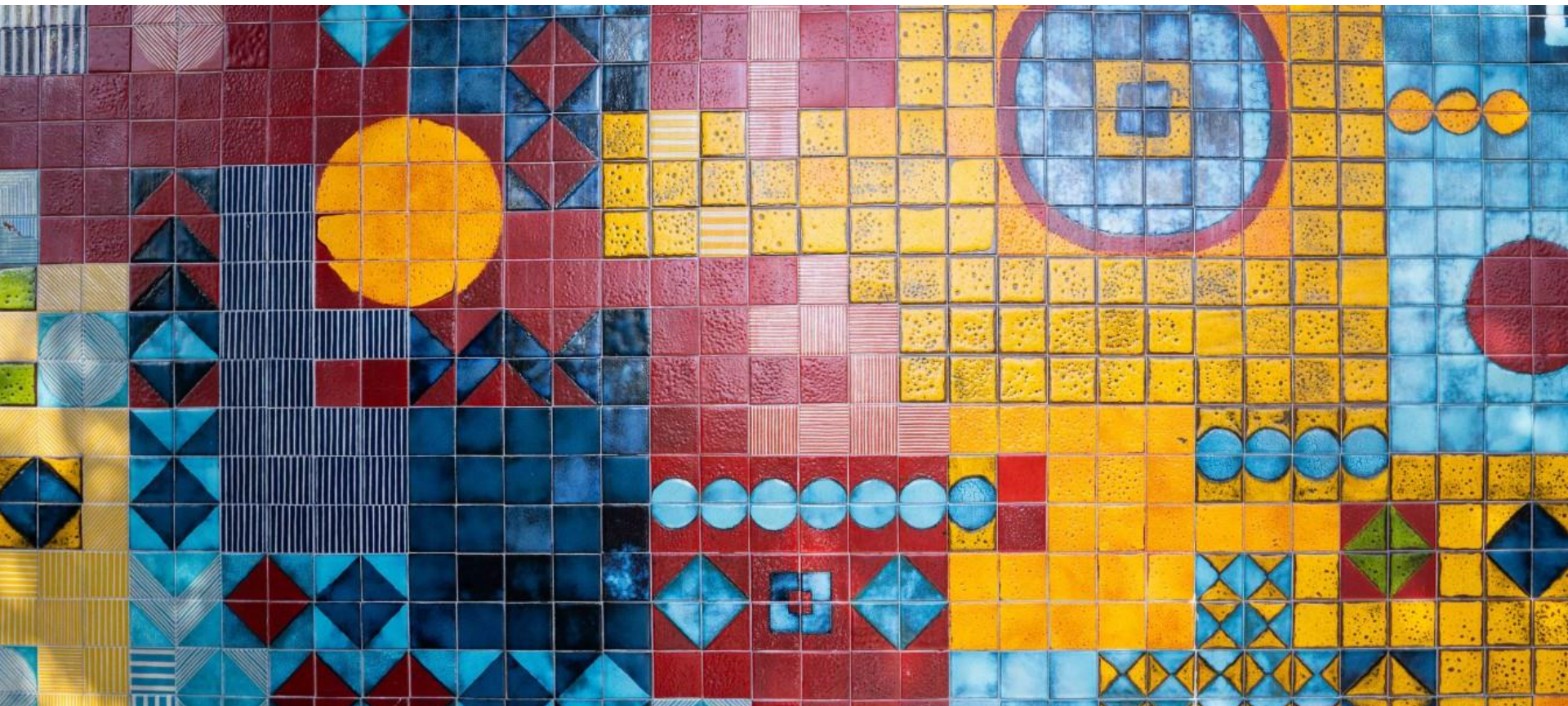


Planning for Sustainable Success

Building a Development Plan for Museums

Donna McGinnis, President & CEO, Naples Botanical Garden

Kate Brueggemann, Senior Vice President of Development, Brookfield Zoo



AGENDA

1. Welcome
2. Philanthropic Trends
3. Components of a Development Plan
4. The Development Cycle
5. Who Gives, How Much, Why?
6. The Team
7. Closing, Questions

Philanthropic Landscape

Where has giving increased? Decreased?

Who can give more?



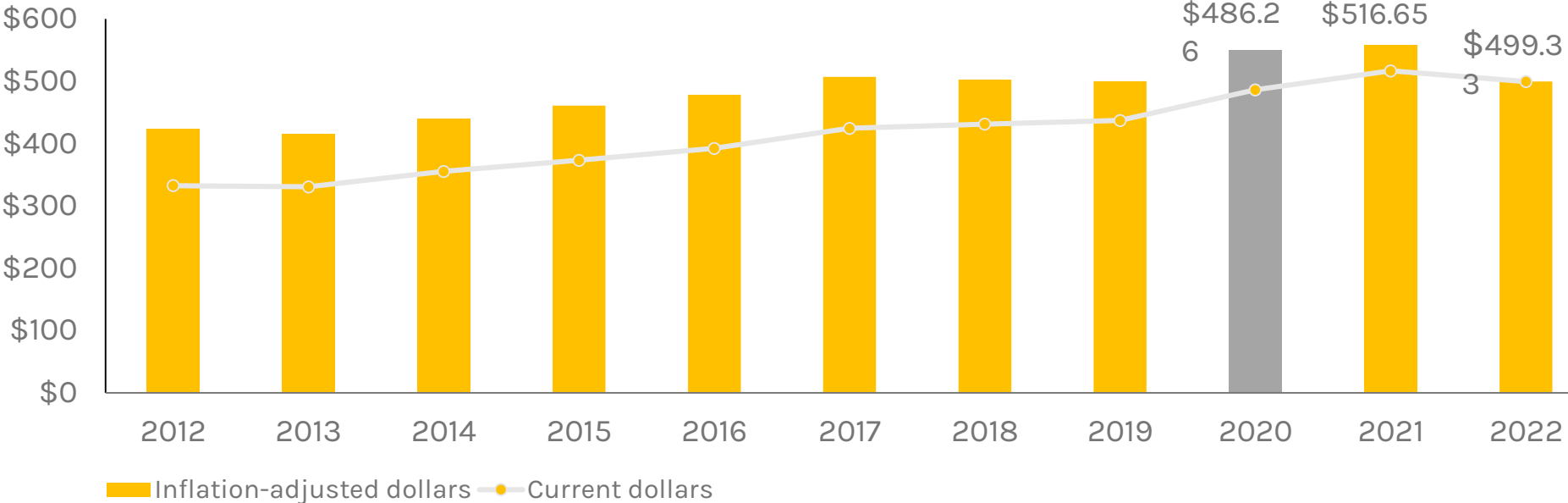
Giving USA

JUNE 2023



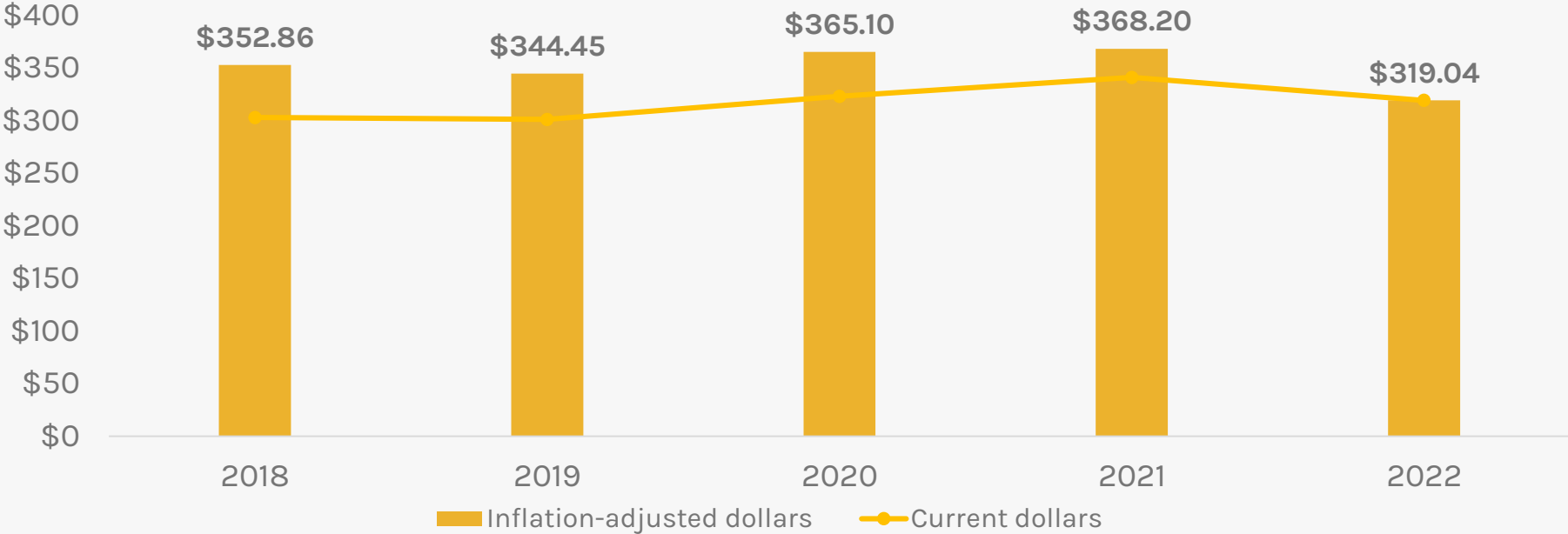
Giving declined to \$499.33 billion in 2022, a year influenced by the stock market and economic uncertainty

TOTAL GIVING, 2012-2022 *(in billions of dollars)*



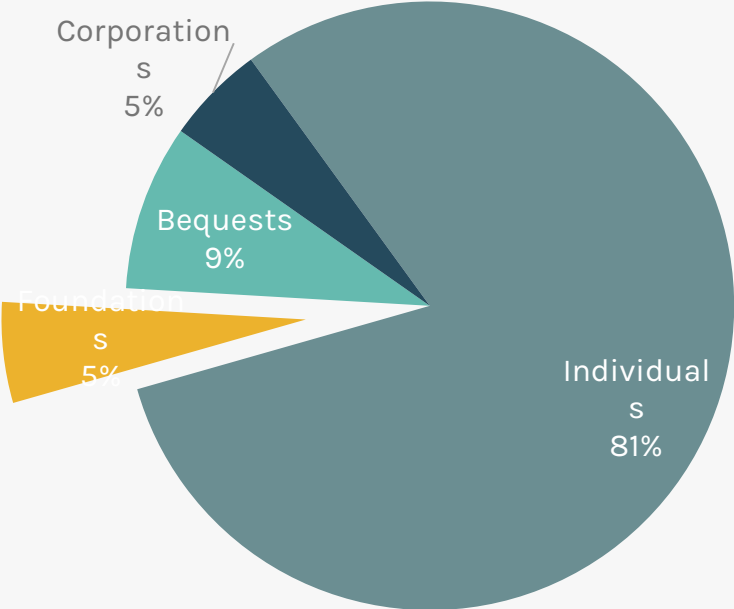
Giving by individuals experienced declines after two of the most generous giving years on record

GIVING BY INDIVIDUALS, 2018-2022

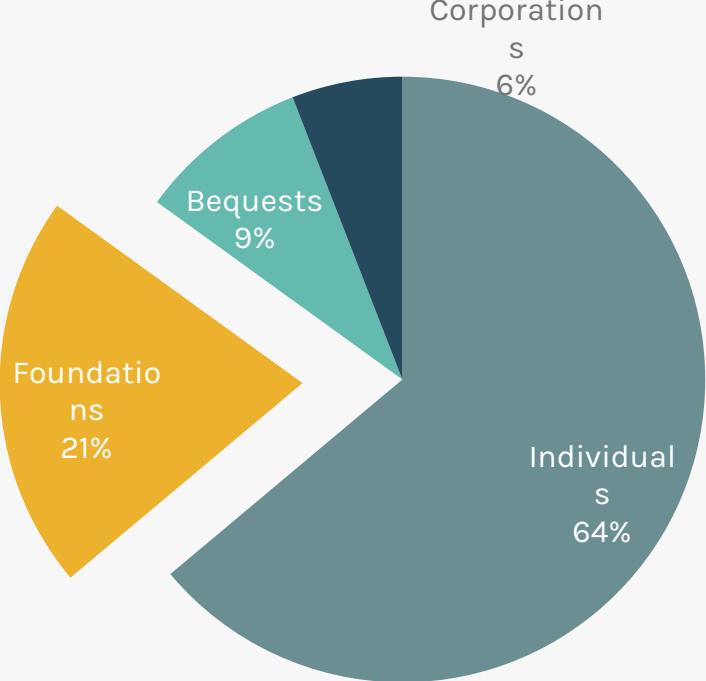


Giving by foundations is growing as a share of total giving

1982 CONTRIBUTIONS BY SOURCE

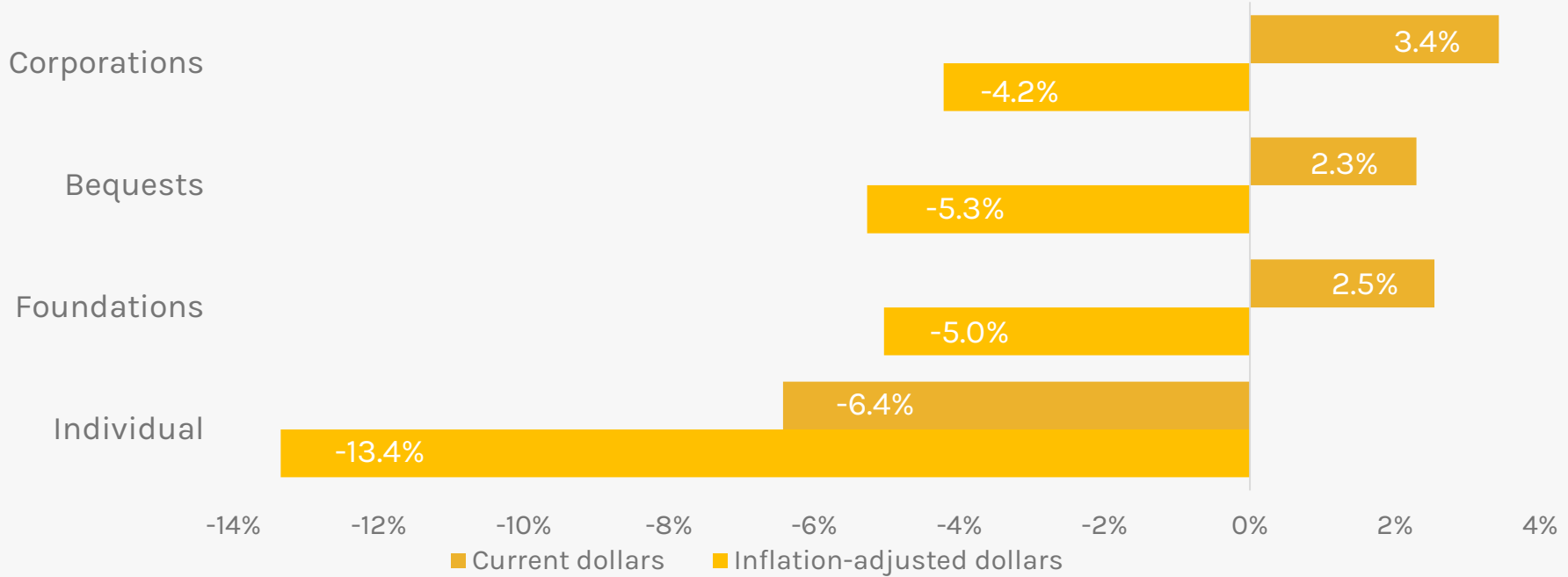


2022 CONTRIBUTIONS BY SOURCE



Sources of giving had mixed results

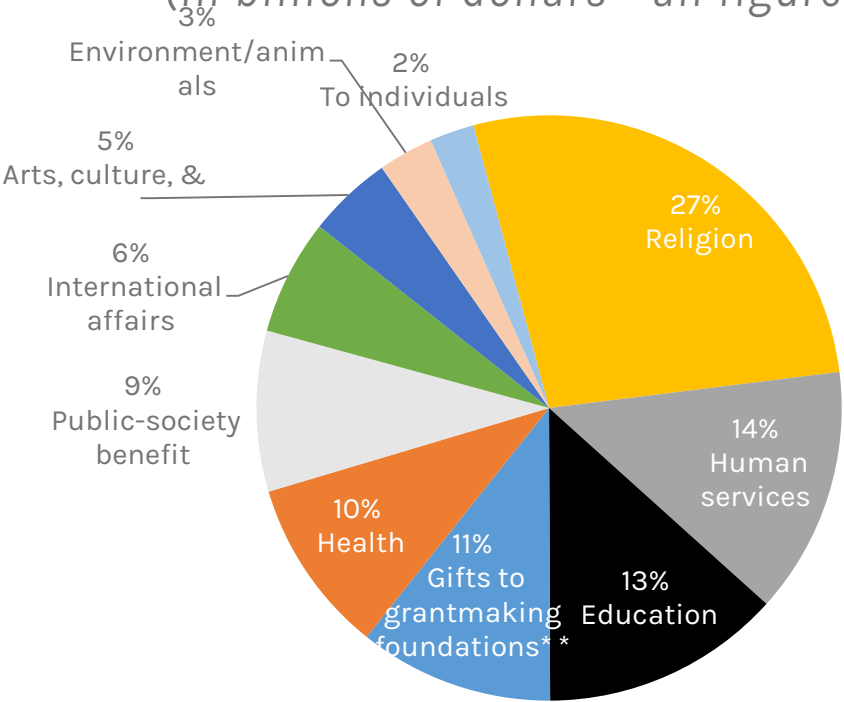
CHANGES IN GIVING BY SOURCE 2021-2022



Giving for some subsectors declined from highs reached in the pandemic era

2022 CONTRIBUTIONS: \$499.33 BILLION BY RECIPIENT ORGANIZATIONS*

(in billions of dollars - all figures are rounded)



* Total includes unallocated giving, defined as the difference between giving by source and recipient categories. Unallocated giving totaled -\$28.54 billion in 2022.

** Estimates developed by Indiana University Lilly Family School of Philanthropy

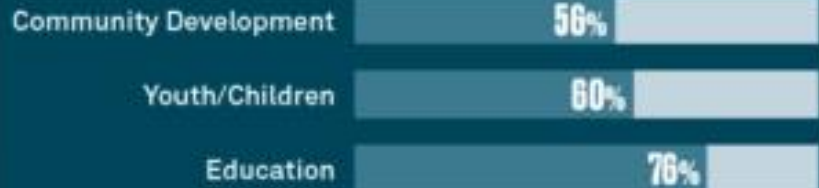
Recipient category	Percent change in 2022 (current dollars)
Religion	5.2%
Education	-3.6%
Human services	-0.6%
Foundations	10.1%
Public-society benefit	-8.4%
Health	5.1%
International affairs	10.9%
Arts, culture, and humanities	2.9%
Environment/animals	-1.6%

Next Gen Philanthropic Engagement

Here's what we heard from the Next Gen in our study in partnership with Campden Wealth, *The Next Generation of Wealth Holders in the United States*.



PHILANTHROPIC PRIORITIES



agree sustainable investing is a connection to other generations with 56% already actively engaged in sustainable investing



are engaged in impact investing (investing in organizations generating positive social/environmental impact and financial returns)



are engaged in thematic investing (investing in particular areas of interest, e.g., clean energy, gender equality, healthcare)



give directly to causes vs. through the family foundation like their families

The background of the slide features a close-up photograph of bright yellow flowers, likely daffodils, with green leaves and stems. The flowers are in various stages of bloom, creating a vibrant and naturalistic backdrop for the text.

Development Plan Components

1. Case statement
2. Annual budget over a 3-year period
3. Financial goals for each area of fundraising
4. List of activities that will take place
5. Communication activities
6. Plan for acknowledgement and stewardship
7. Detailed timeline
8. Budget and staffing
9. Volunteer support

The Development Cycle

Identification

Cultivation

Solicitation

Stewardship

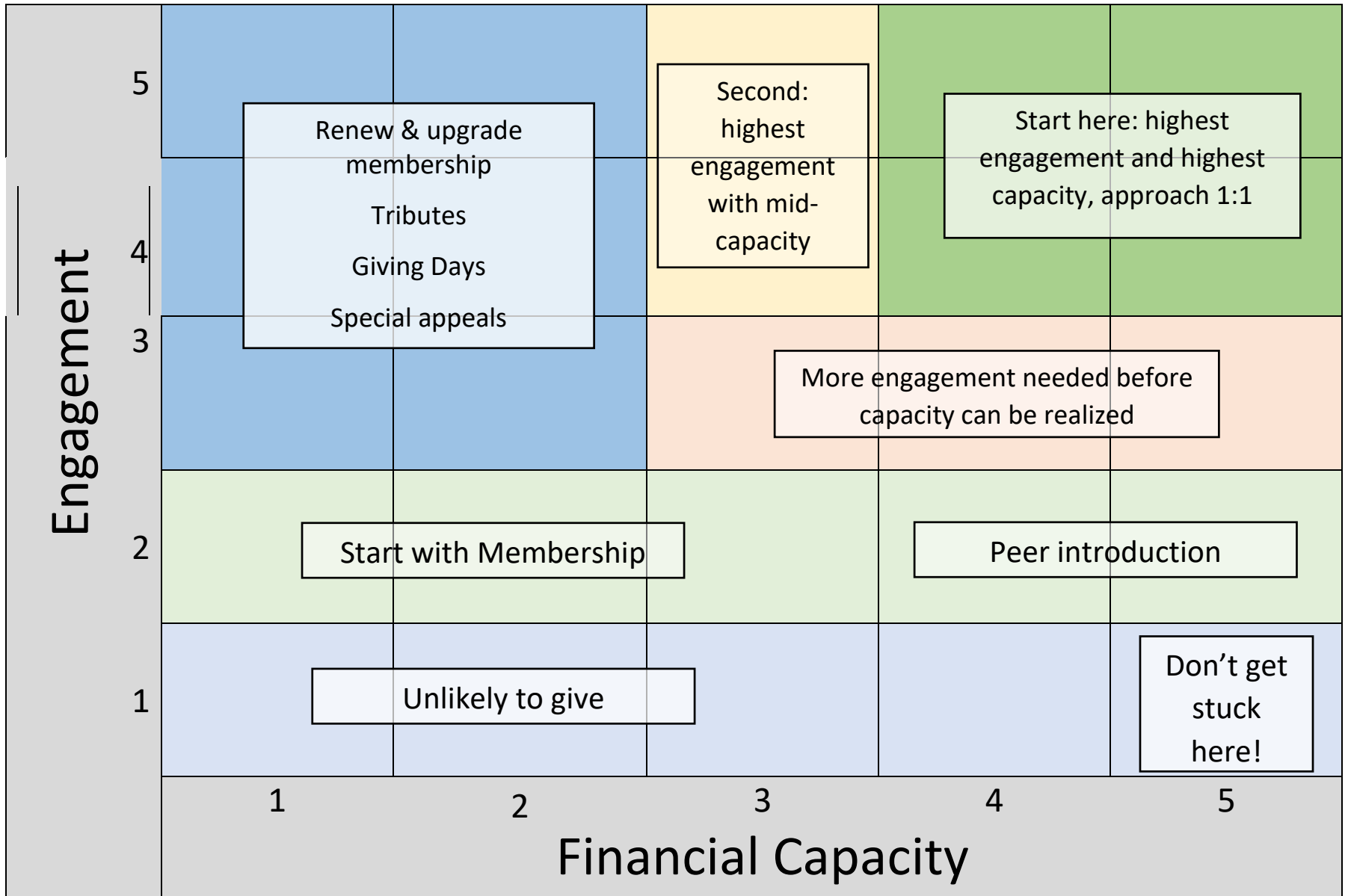


Engagement

5	Serves on the Board or a Committee, volunteers on a regular basis, attends most events, knows staff well, museum is highest giving priority, long history of giving/involvement.
4	Attends events and programs, knows the work of the organization, museum is a priority in giving and involvement, 3+ years of giving.
3	Knows some features or programs of the museum; has renewed a membership or gift.
2	Knows about the museum and has visited. First transactional membership.
1	Not aware of the organization, no history of giving. May have made a tribute gift.

Financial Capacity for an Annual Contribution

5	Annual gift of \$25,000 or more
4	\$5,000-under \$25,000 annual gift
3	\$1,000-\$5,000 membership levels
2	Mid-level membership
1	Basic transactional membership level(s)



Next: Who knows them? What are the best next steps?

DONOR NAME	STAFF MANAGER	VOLUNTEER LEAD	PHASE	REQUEST	ASK DATE	NEXT STEP
Amy Smith	Sarah	Bob	Cultivation	\$10,000	Q3	Invite to lunch with senior leader
Raj Singh	Richard	Kim	Solicitation	\$100,000	Q1	Request visit at home to share proposal
Sarah Hudson	Marie	Susan	Solicitation	\$50,000	Q1	Susan is calling to schedule an ask meeting
Ana Lopez	Sarah	Ralph	Stewardship	\$30,000	?	Share report on exhibit attendance
Warren North	Marie	Alexis	Cultivation	\$20,000	Q3	Invite to upcoming chair dinner

STAGES OF A MAJOR GIFT

	DISCOVER	CULTIVATE	BRIEF	ASK	STEWARD
DEFINITION	More information is needed for donors in the discovery category. Use Wealth screening and board intel	A potential donor needs more touches before solicitation	A pre-ask meeting to prepare for the solicitation meeting	An in-person meeting with a potential donor to ask for a specific gift/pledge	Active follow up to close the gift and thank the donor
IDEAL FOR	Uncovering new prospects though research and list review – work in close collaboration with Membership & Major Gift	Those with limited knowledge of the museum, particularly newer donors with unrealized capacity or longtime members of leadership society members who have fallen away	All prospects who require more information before the solicitation meeting	All prospects who are ready for a request	All prospects who have been solicited.
GOAL	Identify and qualify new donors, upgrading them throughout the process. This should be well documented.	Engage prospects and bring them closer to the museum.	Confirm donor interests at the museum and explore giving ranges	Personally request a specific amount and designation (if different than unrestricted)	Close the gift and appropriately thank the donors
POTENTIAL ACTIVITIES	List review sessions with other teams, board members, and other stakeholders	1:1 meetings, personal tours, invitations to special events, access to a curated video series of donor's favorite areas of interest	1:1 meetings, personal tours	1:1 in-person meeting with donor and solicitor	Written documentation of pledge, thank you letter, recognition, phone call from executive staff, impact report

Why do people give?

Because they want to

To make a change for the good

People don't give unless they are asked

People give to people

People give to opportunity, not needs

People give to success, not distress

Donor types: Outcome, Brand, Transactional



THE ASK

For successful solicitation the donor is asked:

1. By the right person
2. In the right way
3. At the right time
4. For the right amount
5. To support the right thing



TRACKING PROGRESS

	MONTH	YTD	YTD TOTAL \$	BUDGET GOAL
NEW DONORS	30	120	\$5,000	\$20,000
RENEWING DONORS	75	300	\$20,000	\$100,000
LAPSED DONORS	18	38	---	---
GRANTS	3	25	\$100,000	\$200,000
SPONSORSHIP	2	3	\$20,000	\$50,000
EVENTS	1	2	\$15,000	\$75,000
TOTAL DONORS	220	400	---	---
RETENTION RATE	70%	65%	---	---

The Team

Board Members

CEO

Development Staff

Other Staff



THE BOARD'S ROLE

1. Make an annual contribution that is meaningful to you.
2. Identify who you know among the museum's members and make introductions.
3. Spread the word about what the museum is doing.



CASE EXAMPLE: BROOKFIELD ZOO

CAMPAIGN PLANNING & ACTIVATION: TIMELINE

	2022 Q4	2023 Q1 - Q4				2024 Q1 - Q4				2025 Q1 - Q4				2026 Q1 - Q4			
INTERNAL PLANNING & ACTIVATION PHASE <ul style="list-style-type: none"> Finalize case for support Identify, recruit, and train Campaign Leadership Team Build staff capacity and secure campaign manager Hold 7-10 briefing meetings with top prospects, begin Leadership Phase 																	
“QUIET” LEADERSHIP PHASE <ul style="list-style-type: none"> Focus on major gift solicitations ranging from \$250K - \$1M and securing all board contributions Conduct monthly portfolio review sessions Conduct weekly Campaign Committee meetings Continue development staff alignment & encourage professional development opportunities 																	
MAJOR GIFT PHASE <ul style="list-style-type: none"> Close major gifts ranging from \$50K - \$250K Begin strategic collaboration for public launch with Membership, Guest Relations, and Marketing 																	
COMMUNITY PHASE <ul style="list-style-type: none"> Focus on gifts \$15K and below and gear up community support 																	

REFINE AND STRENGTHEN THE CASE FOR SUPPORT

A COMPELLING CASE FOR SUPPORT WILL:

- Provide a framework to inspire donors and encourage giving at the highest levels
- Clearly outline the project plans, timelines, budget, etc.
- Build a narrative above and beyond capital support
- Find pathways for donors to feel like their interests are reflected in the campaign
- Be tailored to engage unique audiences (individuals, foundations, family foundations, government, corporate, etc).

THINK
BIG.



THINK
BOLDLY.



THINK
GLOBALLY.



CREATE A SUITE OF ADDITIONAL CAMPAIGN MATERIALS

Once a strong case for support is developed, a suite of campaign materials will be necessary for use in donor meetings and internally to inform Brookfield Zoo staff. This includes developing white papers, FAQs, proposal templates, gift acknowledgements, and more. Details are offered below.

ADDITIONAL CAMPAIGN MATERIALS SHOULD INCLUDE:

- ✓ A gift proposal template, pledge form/gift intent form, and thank you letters:
 - These should be developed in coordination between the Campaign Manager and Brookfield Zoo development staff
- ✓ Tailored proposals for solicitations
 - Led by the Campaign Manager with feedback from the Case Task Force, staff leadership, and development staff
- ✓ Internal research profiles, strategy memos, and relevant insights from the study
- ✓ A matrix of naming opportunities
 - To be determined by staff leadership, Campaign Leadership Team, and Master Planning team
- ✓ FAQ document
 - Created specifically for Guest Relations, Membership, and Marketing for general community and press inquires
- ✓ Campaign volunteer handbooks/manuals
- ✓ Donor appreciation reports
- ✓ Email campaigns / e-blasts
- ✓ Social media communications
- ✓ Gift acknowledgements

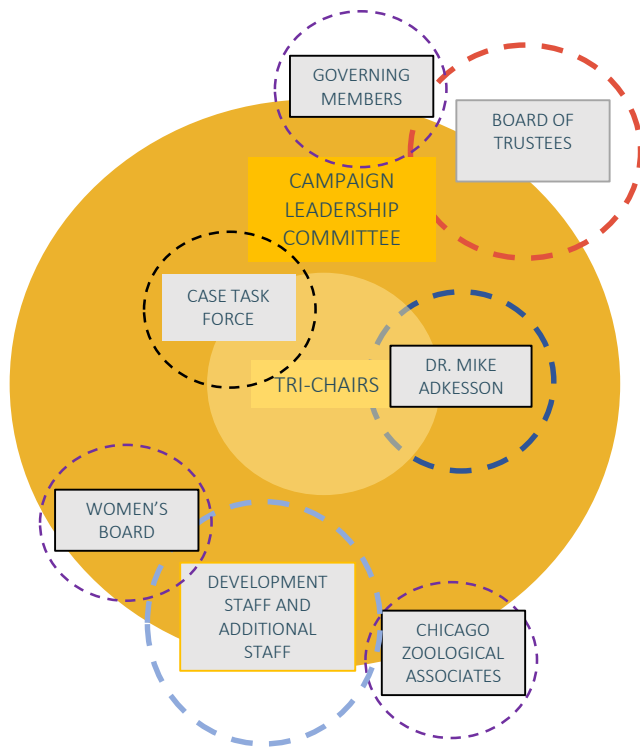
The case for support and supplementary campaign materials will be ever-changing and strengthen as plans mature. New impact data, more informed goals and milestones, and continued learnings will only enhance Brookfield Zoo's case for support.



OUTLINE A CAMPAIGN LEADERSHIP STRUCTURE

- 1. IDENTIFY AND RECRUIT THREE CORE TEAM MEMBERS (OR “TRI-CHAIRS”).** The Core Team will be acknowledged as volunteer leaders of the campaign. They must be focused, thoughtful, and engaged throughout the entire campaign lifecycle. The Core Team will operate as a subset of the broader Campaign Committee.
- 2. CONVENE A CAMPAIGN LEADERSHIP COMMITTEE.** The Campaign Leadership Committee will include 4-6 community leaders and operate in concert with the Core Team. The Committee will engage in campaign strategy development and promote the philanthropic vision throughout the community. Committee members will meet on a regular basis to align on strategy and, where impactful, may be asked to conduct donor outreach or attend solicitation meetings. The committee will have additional support and guidance from Brookfield Zoo Board of Trustees, as well as the Brookfield Zoo executive team. Committee recruitment would take place during the campaign planning and activation period and can be influenced by provided names recommended throughout the study interview process, included in the Appendix.
- 3. BROADLY, RECRUIT DIVERSE AND REPRESENTATIVE LEADERSHIP.** The composition of the Core Team, and Campaign Leadership Committee, should blend newer board members with legacy donors, and should make strong efforts to reflect the racial, age, gender, and professional diversity. In fact, it is our hope that the Tri-Chairs hail from different Chicagoland area and suburbs.
- 4. STAFF LEADERSHIP.** Staff leaders will play a central role in guiding the planning and policy phase of the campaign effort, coordinating campaign volunteer leadership, and developing and advancing prospect strategies that build momentum through the campaign.

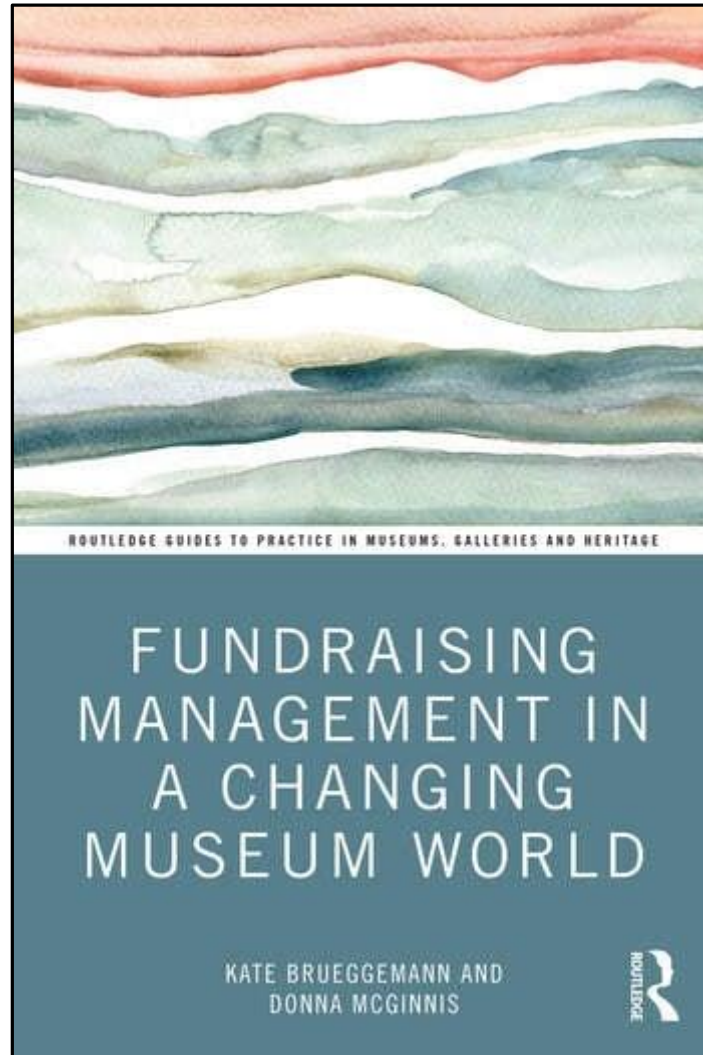
DEFINING LEADERSHIP ROLES



GROUP	ROLE
TRI-CHAIRS	<ul style="list-style-type: none"> 3 individuals to lead decision-makers and solicitors in the campaign fundraising effort. Campaign Leadership Committee and Board of Trustees point of contact to activate major gift strategies. Meets monthly to align on campaign priorities. Tri-Chair's have the option to phase out of the campaign at a natural point (ex: yearly)
CAMPAIGN LEADERSHIP COMMITTEE	<ul style="list-style-type: none"> 6-8 people total. This group would remain intact throughout the entirety of the campaign. Primary public owners of the effort who act as advocates, solicit campaign support, guide strategy, and make elevated commitments to the effort. Prepare for and advance campaign gift strategy in bimonthly meetings, and as needed in a 1:1 context, and would engage with the Case Task Force in the first 3 months.
BOARD OF TRUSTEES	<ul style="list-style-type: none"> Provide necessary approvals for the campaign and funding elements within it to move forward. Receive regular updates and support the effort by acting as spokespeople for the vision, giving, and helping open doors. Notably, these groups intentionally overlap with Committee leadership to foster communication and transparency.
CEO	<ul style="list-style-type: none"> Elevate the campaign effort as an institutional and philanthropic priority among leadership and in the community. Participate in the key solicitations, primarily for the top 7-10 prospects in the first 4-6 months of the campaign launch. Additional details are outlined on the next slide.
DEVELOPMENT STAFF AND ADDITIONAL STAFF	<ul style="list-style-type: none"> Coordinated by the SVP, Development and the campaign manager, meet weekly and communicate daily to advance campaign priorities across a dedicated timeline. Coordinate and empower campaign leadership. Cultivate and solicit donors in a phased approach and guided by readiness.
WOMEN'S BOARD, GOVERNING MEMBERS, CHICAGO ZOOLOGICAL ASSOCIATES	<ul style="list-style-type: none"> Leverage the campaign to open new doors, make introductions, and host small receptions to cultivate donors. This group will receive regular updates and support from the Development Staff, and occasional presentations from the Campaign Leadership Committee.

MUSEUM ABC ANNUAL DEVELOPMENT PLAN

STRATEGIES	ACTIVITIES	STAFF LEAD	DEADLINE



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