ADVISORY BOARD for the ARTS

Transforming Arts Organizations Worldwide

Practices For Major Gift Efficiencies

July 2023

Participant Organizations

Wildlife Conservation Society

Colgate University

Field Museum

Intrepid Sea, Air & Space Museum Complex

NYBG New York Botanical Garden

WWF

Research Questions

Principal Question: How are organizations managing the workflow and processes for major gift efficiencies?

Overall structure of development departments

- How is your advancement team structured- different departments within? (e.g, special events, donor relations, principal gifts etc.)
- Who do people report to? What is the hierarchical structure?
- How many staff do you have in advancement as a whole?
- Have you grown your team in recent years? Any specific areas in particular?

Collaboration with other departments

- Which departments do you work with most to fundraise specific projects?
- How do you assign different development officers/ MGOs to specific projects? (donor based, topic based, ?)
- What materials, if any, do MGOs receive from other relevant departments to understand the scope of a project and help them consider the best donors or 'market' the project to a donor?

Team communications & reporting

- What kind of communications do you rely on within the advancement team? (e.g., meetings, intranet, slack, teams, newsletters? …)
- How do you ensure there is a formal process/ consistent and regular sharing of information and projects?
- How often do you meet as specific internal teams and as a whole department?
- What gets discussed at all department meetings?
- How do you plan your different campaigns? Do you have a formal work template to share information and updates?
- How do you manage internal data reporting for your team?

Project and fundraising alignment

- Do you have an internal process to ensure your fundraising officers are spread out across different project needs? (checking for any overlap, not wanting to put too many people on same project/ campaign)
- How do you coordinate between MGOs who are fundraising for the same project?
- Do you have a formal process to check when MGOs have reached the fundraising goals. needs and are not overselling to too many donors?
- How do you check there is a balance to avoid over fundraising for some projects and under raising for others?

Key Findings

Project and fundraising alignment

- The issue of **overfunding doesn't seem to be as much of an issue for many organizations** as they maintain clear communication channels and encourage more unrestricted gifts they can more flexibly transfer to different content areas.
- Discovery portfolios and focusing on segmenting prospects vs. long-term loyal donors is quite prevalent across organizations, and can help **formalize the process to steward new relationships and build them up into bigger donors**.
- In terms of how funding priorities are established, there doesn't seem to be a single method that works better than others. Depending on the size of the institutions **some will start with donor interests and match to existing project, or vice versa, finding donors that align with stated projects and priorities**.

Team communications & reporting

- Overall, **major gift officers need more access to content materials** such a slides, stories, videos and reporting figures to be able to present their cases for support. Developing an archive or template documents can help in that process.
- **Advancement communication teams seems to be among the most critical piece to free up gift officer time** to focus on their portfolios and to avoid inefficiencies of multiple people working on the same report.
- The level of sophistication of data collected varies by organization and **depends heavily on how development CRMs interact and integrate with other departments' systems**. Improving those connections would improve the tracking and reporting gifts (vs. manual input).

Key Findings

Collaboration with other departments

- Creating **touchpoint opportunities/in-person retreats with programming and education departments** is critical to ensure that gift officers have the full picture of those departments' work and can leverage those stories in cases for support.
- Meetings are the dominant form of communication both within development working teams and across departments. Ensuring there is a **regular cadence to these meetings is essential to build a culture of collaboration** and information sharing.
- **Organizations should not neglect social gatherings** (whether in person or remotely) as opportunities to break down siloes and use more informal interactions as ways of promoting information sharing and getting people out of their formal lanes.

Overall structure of development departments

- Depending on the size of the organizations, individual giving teams are more or less built out, with **some institutions enjoying the supporting roles of dedicated advancement communication staff** as well as donor stewardship positions and research.
- Some participating organizations are in a hiring phase, looking to **increase the number of their major gifts officers** which in turn could help **restructure how portfolios are managed and assigned**.

Report Outline

1. Project & Fundraising Alignment
2. Team Communications & Reporting
3. Collaboration with Other Departments
4. Development Team Structures

Aligning Funding Priorities with Institutional Needs First

When considering major gifts and establishing funding priorities there were two main approaches we heard: **either starting from the organization side and finding donors to match,** or going straight to donors and aligning projects to their interests. Those who start from institutional priorities and projects have different ways of adopting these processes.

Core Content Area Funding

"That's been kind of a challenge for the museum historically. The hope is always that the funding initiatives would come out of the strategic plan. But typically, I was doing more driving of prioritizing those initiatives than I'd like."

Ideally, funding priorities start from established organizational priorities and wider strategic plans. MGOs then find donors to match those initiatives.

Shifting from Core Content Area Funding to Project Funding

"When I first arrived, unrestricted general fund gifts and semi-restricted gifts were geared for ongoing major work; things that had been planned as part of wider strategies. We are starting to shift towards more project-based fundraising…"

Some organizations are revising the practicality of funding for major content areas, and seeing if project-based funding or a blend of the two can better serve current and long-term needs.

Specific Project Funding

"In this case, the project more often comes first. We're short staffed so if a donor has an interest in a special helicopter, we can't really go out and get it. So, you can't create a whole new exhibit based on a donor's interest with a small staff, but you do want to accommodate them."

Funding priorities start from existing smaller scale projects instead of major strategic pillars, but still from an existing needs first and finding the donors to match.

Source: ABA Interviews

Choosing Between Core Content Funding or Specific Project Funding

While fundraising for larger institutional priorities and content areas can support the case for unrestricted gifts, there are organizations who are **shifting to more reactive project-based and need-based funding** to be more pointed in their solicitation and more responsive to shifting organizational needs as they arise.

Content Area Priority Funding

Pros

- Promotes donor habit for unrestricted gifts
- Supports major planned campaigns
- Can be more flexible to shift funding within larger content areas

Cons

- Not as flexible and reactive to new projects and needs
- Requires more planning and approval upfront in alignment with major priorities
- Lack of specify doesn't allow for target donor alignment

Specific Project Funding

Pros

- More reactive to ongoing and new needs and projects
- Greater specificity can support target focus on donor interests
- More tangible projects vs. general support can generate more committed interest

Cons

- Not as unrestricted – so there are more limitations for the use of gifts
- If no ongoing project aligns with a specific donor interest can represent a missed opportunity for support

Source: ABA Interviews

Reality Is Often More Ad-Hoc for Major Gift Priorities

Despite certain organizations trying to manage their approach to funding priorities starting from institutional needs first, the **reality is often less structured and often implies a certain flexibility from MGOs** to adapt their strategy if they do not have full visibility into what the priorities are.

Complicated ORG Structures Can Make Priority Alignment Challenging

"In an ideal world, how we try to operate is a bottom-up organization, so staff in the field say, "this is the need we have" and they get that approved by their regional director, and that all gets funneled up to their EVP and Finance Team to set the agenda for what our priorities, and those are supposed to be fed to us as fundraising priorities and then we fundraise accordingly. But the organization is a bit complicated for that to work in practice all the time, so often it'll happen on the fly."

Depending on the structure of your organization, with teams working globally or from different offices- aligning on major content area priorities can be more challenging especially in terms of gaining full approval. In these cases MGOs must be more flexible and ready to shift gears as needed.

Lack of Clear Goals from Staff Can Make Prioritization More Nuanced

"I consulted with the directors of other areas of the museum, but still I'm sussing that out and saying, "you've been talking about these things, we have a donor who's interested." So, the funding priorities aren't neatly identified, it's more organic and ad hoc, and you figure out what they are along the way. And then we lead donors to them."

Occasionally, working across departments and talking with Department heads yields unclear priorities and needs- so MGOs must interpret what is said and find donors interested in those projects. This may also imply more flexible planning and also shifting priorities as projects get more defined.

Source: ABA Interviews

Easier In Some Cases To Start from Donor Interests for Funding Priorities

For organizations with more complicated organizational structures and with overseas branches, **starting with donor interests to align donors to project needs and other wider institutional priorities seems easier to manage and target**. Donor interests is also a way for many larger organizations to **manage their conversations with other departments and teams to find synergies.**

Donor Interest Are Usually More Consistent with Fewer Changes then Internal ORG needs projects

"We've tried to proactively get updates and priorities from the field, but we stopped all of that. We've been far more donor-driven and reactive, and we're better set up that way. That seems counterintuitive, but it actually works better for us. When we try to get proactive, that's where we get into trouble because someone says "oh we need this" and then you go out and fundraise for it and then the need changes."

Some organizations have found that donors interests are more stable and consistent- so working from there to find project alignment is more efficient and yields better results, whereas project based priorities can evolve over time and often require more shifting from gift officers.

Starting from Donor Interests Helps Build Out Portfolios and Align Donors to the Right Program

"All the decisions of what we'll fundraise for is driven by the conversations with the donor - what happens over time is that your portfolio as a fundraiser starts to take some shape. So, for people who have been here longer, you will be more likely to be assigned to incoming donors with interests that align with your portfolio. But we have to know the whole organization and guide a donor to whoever needs to be in the conversation in terms of program staff."

Assessing donor interests first as part of funding prioritization seems to help organizations build out their gift officer portfolios around those interests and they can better target and align donors with the right program staff for the storytelling piece and case for support.

Source: ABA Interviews

Changing the Narrative & Structures for Giving to Encourage Unrestricted Gifts

Ideally organizations want to move their donors away from more restricted project-specific gifts to more unrestricted donations to avoid the risk of over fundraising for certain projects and areas over others. This requires time in order to change donor habits, as well as build a more compelling case for why broad support is more impactful long-term.

Wildlife Conservation Society: Re-working the narrative away from 'owning' projects to broad support

"We had issues in the past with getting too many restricted gifts, we couldn't operate given our scale. We addressed that by driving for unrestricted funding and making any restrictions as broad as possible. We had to push donors out of the traditional philanthropic mindset of "owning" projects. We've created broader funding opportunities, like "giving to nature strongholds" which helps across our global projects. We also work with finance to develop talking points about the benefits of unrestricted giving."

WCS has been successful at shifting donor mindsets from more target projects to long-term impact which fits with their environmental focus. They have also partnered with Finance to not only craft a compelling impact story, but also to present the clear financial implications of unrestricted support. They are using emotion and reason to encourage unrestricted giving.

Intrepid Sea, Air & Space Museum Complex: Focusing on large organizational areas to satisfy specific interests while being broad

"We have our "Fighting I Fund" which is unrestricted and covers general operating expenses. We certainly appreciate supporters passions for specific areas and projects, and we understand people are more likely to give to areas or projects they are most passionate about. At the same time, we also recognize the value of unrestricted giving. In an effort to provide donors with opportunities that align with their interests without getting too specific, we created broader categories like education programs, collections, and aircraft restoration. We implemented these on Giving Tuesday last fall, and we saw a significant increase in donations compared to past Giving Tuesdays when we just offered the general "Fighting I Fund."

The Intrepid Museum revamped the structure of their Giving Tuesday model to blend general operating funds with more target/restricted areas. They offered donors 5 core content areas to support- instead of a single fund. This not only helped funnel gifts to specific areas, but also highlighted what donors were interested in for future solicitations and activations from major gifts officers etc.

Source: ABA Interviews

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Current State and Ownership of Development Communication Materials

Overall, it seems for many organizations there are **insufficient processes to ensure that MGOs have access to the information they need to support storytelling** when soliciting major gifts from donors. The issues seems to fall under staffing resources, and who has the time and ownership of making of these support materials.

Getting content support from programming and marketing departments can be challenging

"In terms of materials, that's up to the development department to put together. Getting data from the programming departments can be really hard. Getting reporting numbers and information is a struggle, so it's our responsibility to really wrangle the programming departments and to create materials."

~

"Marketing doesn't produce materials for case for support. They produce stewardship communications for donors, like newsletters for patrons, invitation for events things like that. But for case for support materials- we don't have the same level of production."

Ideal situation is when you have dedicated advancement communication staff to build out material inventory

"The donor communications shop works closely with the program side to generate reports and collateral that's available to the MGOs to use, which could include a map, some slides, a video clip. They can tap into it on a self-serve basis. So, we have a donor communications library that we can just pull from"

~

"Realistically it would need to be a development communications person which would lend unity to the voice of your team. Because it's more ad hoc, it would make the most sense to have that sit in development."

Without dedicated staff for advancement communications, many organization and gift officers face the challenge of not getting the needed support to create case for support materials whether in terms of content or reporting figures from programming and marketing. If your resources allow, investing in staff dedicated to development communications is worth it.

Most common materials MGOs need

- ❑ Case statements for projects as takeaways for donors
- ❑ Standardized template for case statements for MGOs to craft as needed
- ❑ Plug and play project descriptions for easy changes
- ❑ Short easy description of specific and general programs
- ❑ Corpus of materials for past, ongoing and future community programs
- ❑ Other materials could include maps, video clips, slides
- ❑ Library of materials that MGOs can refer to and self-serve as needed
- ❑ Access to annual reports for programs that require reporting

Source: ABA Interviews

Creating Moments for Programming and Development to Come Together is Critical

At the World Wildlife Fund, they have put in place a series of different practices to intentionally put their programming staff in front of their MGOs to share programmatic content . **Storytelling has become the crux of how their MGOs motivate major gifts** thanks to the mutually beneficial collaborations with programming staff.

Settings expectations for frequent collaboration between gift officers and program staff

1. At WWF it is a common practice for MGOs to go directly to specific program officers for content and information when they have donors that are interested in specific topics ears.

2. WWF takes program staff on donor visits. They also have salons around the country hosted by donors, that feature a specific program and a program expert.

WWF has successfully created a culture where collaboration between major gift officers and program staff is expected both in terms of gathering information to align project with donors, but also in presenting the programs and making the case for support directly with donors.

Organising annual and bi-annual retreats and meetings to align on major goals

1. WWF organises bi-annual retreats where major gift officers interact directly with programming staff in all 6 major areas of the organizations. These retreats are critical to aligning MGOs with the actual stories and goals of specific funding areas. MGOs get the opportunity to ask questions and better understand the goals for the next X number of years.

2. WWF also organizes annual portfolio reviews for each major content area bringing the whole development team together to assess synergies and best alignment for specific needs whether individual, foundation or corporate etc.

By organization different annual and bi-annual core strategy meetings, that bring all of development together and development with programming, allows for alignment on a variety of fronts to ensure teams are not only working efficiently internally but also across different departments for long term gaols.

Source: ABA Interviews

Dedicated Advancement Communication Staff Helps with Storytelling

Throughout our interviews many organizations highlighted the advantage and importance (resource allowing) of having dedicated staff for development communications that can work across departments including Marketing to manage the production of advancement materials etc.

Colgate Advancement Office

Fundraising team
- Annual giving
- Donor relations
- Leadership gifts
- Major gifts
- Principal gifts
- Senior Proposal Writer

Engagement team
- Alumni relations
- Donor relations
- Athletic fundraising and engagement
- Relationship development

Operations
- Gift records and processing
- Online community management

Cross-Department Staff Dedicated to Advancement Communication

- Staff sitting across both departments
- Facilitates efficiency and reporting (removes issues of multiple people working on same/similar reports)
- Facilitates cross team collaboration
- Facilitates visibility into gifts and work processes

Colgate Communication Office

Content Strategy
- Includes Advancement Communications Director
- Includes Advancement Communications Manager

Creative Team

Athletic Communications

Athletic Communications University Events

Source: ABA Interviews

Prioritizing Tagging Capabilities Supports Donor Alignment and Gift Reporting

In terms of overall recommendations for leveraging data collected through CRM systems, we heard the most around setting up relevant tagging for donor interests and gift histories to improve moves management processes as well as to facilitate reporting for specific campaigns etc.

1. Tagging the relevant information about your donors' interests and histories

"We've done a lot of work on moves management - inputting and offloading people into major gift portfolios… I think we've done a good job of systematizing that around portfolio health, and understanding what we need to know about prospects before we put them into a major gift portfolio. "

When setting up your CRM systems, it is important to discuss the kinds of information you want to be able to tag and report on whether in terms of donor interests, past ticket buying, attendance etc.

2. Tagging incoming gifts to facilitate reporting to specific campaigns

"But it gets complicated because you need to be able to tag every gift that comes in, so it shows up there, but we're not there yet. We're still retroactively trying to build the capacity to tag gifts as they come in, which would be a game changer for a lot of the work that we do."

You also need to set up a system where you can relate gifts more specifically to different campaigns and projects to facilitate reporting and tracking on progress. This is especially important if your CRM doesn't integrate with the systems used by Finance.

3. Caveat for Using CRMs Effectively

"We're on Raiser's Edge now and it has the capabilities we need it to have, it's more about making sure on our side the processes are standardized. Also making sure any incoming director isn't changing up the process so much that you can't look at things historically."

CRMs are set up to do most of what organizations need, but the main issue is in the work processes set up to ensure staff are correctly and consistently inputting the information needed and creating a habit of pulling reports and checking on in-progress work.

Source: ABA Interviews

Colgate UNIVERSITY

Insights into a University Model: The Pipeline for Donor Stewardship

Throughout our conversations different organizations manage the tagging of their donor interests and historic gifts based on the capabilities of their respective CRM systems and the needs they have identified. Here we have the example from Colgate University and how they tag and signal different steps to bring their prospects long the journey to donating.

Moving donors from inactive 'suspects' to active opportunities and tracking outbound requests

Phase 1: Identification and Research

"For all new prospects we first need to find them and qualify them as a 'suspect' in our CRM. Then we do research to see what their capacity to give could be. At this we also look at what kinds of programs they might be interested in and tag that in their profile."

- Find prospects
- Research potential give
- Determine interests

Phase 2: Assigning MGO and Making First Contact

"If a new potential donor has a gift range that fits into the major gift bracket, we assign them an MGO who goes to them with an offering that connects with what we think they'd be interested in. Here we might learn that they have other interests"

- Assign gift officer
- Make first contact
- Confirm interest

Phase 3: Setting a Target for Donor to Start Process

"If a 'suspect' has not yet been worked by a gift officer, they'll get an opportunity entered into their record at the low end of their gift range. They are discounted by 15% in a report and seen as a potential. We can now focus on moving that "discount" to an actual gift."

- Tag opportunity
- Set a stand-in 'discount' gift
- Plan for solicitation

Phase 4: Confirmed Interest and Ready for Solicitation

"If a specific donor qualifies for a certain project or campaign – for example they have asked for more information- we move them along our reporting column to 'qualified prospects'. They're now managed by a gift officer that can assess the ask, and then can move towards the moment of solicitation."

- Final confirmation of interest
- Assess realistic ask
- Start solicitation

Source: ABA Interviews

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Prioritization of Cross-Department Meetings to Align Goals and Narratives

As Advancement requires the work of many departments, it is essential to break down siloes as much as possible, and promote a culture of collaboration and information sharing. There are a number of meetings styles and practices that organizations have implemented to bring leaders together to not only share program 'stories' but also align on priorities.

Connecting with different departments for specific project funding

At the Intrepid Museum they work closely with their Education department for their community, STEM, veterans and access programs that receive regular/annual private funding. They also work with the Exhibitions and Collections departments on various current and upcoming exhibits that are either currently being funded by donors or will require funding in the future. Finally, they work closely with the Marketing and Communications departments to discuss donor and external communication needs.

Creating a culture of meetings within Advancement teams

At WWF they have recently instituted bi-annual meetings to bring together all fundraisers across different teams to discuss the 6 major goal areas of the organization. The intention with these strategic meetings is to assess opportunities for synergies and get fundraisers out of their strict lanes. The first round went very well, but did require a heavy lift and cannot be done too often at the risk of ruining cooperation.

As part of a move towards increasing communication across departments to facilitate the work of major gift solicitations and fundraising in general, other museums have increased the frequency of senior leadership and director-level meetings to exchange on high level updates. While some of these newly instated meetings remain at the reporting level, there is a hope that they become more working meetings for directors to problem-solve more collaboratively.

Source: ABA Interviews

Regular Meetings Supports Shared Visibility into Work Processes

Organizations discussed the importance of setting up a **regular schedule of meetings to ensure constant updates both within specific working teams, but also at the department and wider organizational level**. In addition toe regular cadences, meetings should involve different people to ensure **information is shared across seniority levels.**

	Wildlife Conservation Society	INTREPID SEA, AIR & SPACE MUSEUM COMPLEX
Weekly	• Individual giving team meetings – updates on priorities and ongoing projects; presentations from program staff and sharing of funding opportunities • 1-1 meetings with each MGO to check in on their specific donor reports and moves management	• Weekly check-ins between Director of Individual Giving & Membership and direct reports and the VP of Institutional Advancement for ongoing daily conversations, as well as projects and updates. • Weekly VP level meetings with the department executives to provide departmental updates and larger strategic conversations.
Bi-weekly	• Major gifts team meets biweekly to discuss donor strategies and workshop them amongst the team.	• Bi-weekly inter-department meetings with various departments. In between those meetings there is a constant flow of emails and conversations.
Monthly	• Frontline Fundraiser meetings – for individual and institutional giving teams; presentations from program staff and sharing of funding opportunities	

Source: ABA Interviews

Fostering Social Interactions Across Departments

WWF

At WWF they have two interesting practices that support collaboration across teams. They look at opportunities to **boost more organic social gathering among teams** as well as encouraging people to **engage in diverse projects based on their own personal interests**, and not necessarily directly related to their specific job titles. This gives people visibility into other areas of operations.

Breaking down department siloes through social gathering events and ERGs

"We also have a softball team! And through our DEI shop we have ERGs for diverse staff communities such as Asian American, African American, LGBTQ, New To Conservation, Career-Long Conservation, etc.

An as organization we also celebrate theme months like Pride, AAPI, etc. with content at staff meetings, catered lunches/sweets, etc.

So, there's a lot of opportunity for cross-departmental socializing. We do have staff meetings too, once a month. So, all kinds of ways to build those relationships and learn from each other in more organic interactions."

Going beyond formal work-meetings and encouraging more social interactions can increase good will between teams, which in turn will foster greater ease and inclination to collaborate and see how all teams are working towards the same end.

Breaking down department siloes by encouraging staff to get out of their strict job-related lanes

"I agreed and am enjoying my time on the Program side of the house, working on the Greater Mekong Initiatives, which I do alongside my development work. Our Asian Species expert asked me to do it because we worked on tigers together, and I was like "sure!" we're all about intellectual curiosity over here.

And we have a gift officer in the mix on the Great Plains program - so we have people doing the same kind of thing, they're plugged in even though they aren't a dedicated fundraising lead for a specific content area."

Creating opportunities for staff members to step out of their formal lanes enables people across teams to have visibility into areas of work they might not otherwise be aware of and this can facilitate more goodwill and general appreciation of everyone's contribution to the mission etc.

Source: ABA Interviews

Report Outline

1

Project & Fundraising Alignment

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Development Department Structures

Varying Approaches to Assigning Donors to Major Gifts Portfolios

Ideally organization **would consider assigning donors to gift officer portfolios based on donor interest segmentation** in order to have specialized officers for specific content areas, **however the reality seems less rigid and focused**, and more about assigning donors based on regional locations and seniority/experience with larger donors.

Regional assignments

"It's largely geographic. We have directors leading each of the teams, SF, Chicago and DC…"

~

"Ours is a regional-based program. MGOs specialize in certain geographic areas. We keep portfolios at around 100-130 households. You can always sunset people who are giving to the annual financial aid fund, and then prioritize those giving to a capital project - so we're nimble in that regard."

Strength-based assignments

"Mostly MGOs have donors across their portfolio. Right now, we feel like our breadth of donors doesn't allow for that specialization in a portfolio. But we do have certain MGOs with content focus areas - for example one MGO who focuses on all the education initiatives, so is the point of contact for those.

Sometimes by virtue of the strengths of gift officers we may do that a little bit, but again there's not enough to just carry, say, an anthropology portfolio. There's also one gift officer who works with a lot of our women's board members since she used to be on it."

Seniority-based assignments

"Our Major Gifts is very small, so we have no super specific way of assigning people based on such segmented targeted interests.

In terms of funneling new people to major gift officers- I work with people with longer institutional history and with people who need more leadership contact and have higher expectations/ feel entitled to certain treatment.

Other MGO gets newer people and people with fewer stewardship "needs".

New Dedicated Discovery portfolios

"In rebuilding the team we're looking at a few different approaches to how we build those portfolios, like having one person be more of a discovery portfolio rather than mixing that with board members."

~

"There are two levels of GOs, the junior ones have more prospects and suspects in their portfolios than the senior ones; senior ones have the more established portfolios"

Source: ABA Interviews

Looking Across Different Supporting Roles to Enforce Clearer Strategies

Across our calls, a few organizations discussed the current state of their teams, and how they are planning to **restructure their major gift staff** with new hires and shifting portfolios and responsibilities. Others, also shared with us their ideal changes that would support their efforts if the resources and staffing were available **to build more of an ecosystem of supporting roles within and across different department.**

Hiring for new discovery/entry-level gift officers to focus donor portfolios

"Just hiring for open roles now, but reimagining what those positions could look like. I think there's room for more of an entry-level portfolio with discovery prospects. That takes a certain technique. We've recognized that the discovery process is not as well established and that pool is a little static, so trying to break up some things."

Building out internal supporting roles and teams within the Development Department to improve MGO efficiency

"We have a donor communications s and stewardship teams within development, and we have prospect research and management. Those two teams are very much about supporting the MGOs. There are some organizations where all of those functions have to be undertaken by the gift officer. That becomes "not fundraising" time."

~

"We have a Stewardship Manager role open right now- I want to see a more formalized institutional strategy for that. What's the framework we can hang that on? Want to see that person come in and play with what that could mean and what a suite of stewardship touchpoints could look like. Historically it was a more task-oriented position."

Connecting with supporting staff in other departments to improve communication and reporting

"Also just having access or someone on the programming side be almost like a writer for them, or a data manager for them, so that we are able to pull these things to report on the programs would be really helpful."

Source: ABA Interviews

Appendix : Organization Benchmarking & Interview Profiles

Participant Benchmarks

	Wildlife Conservation Society	Colgate University	Field Museum	Intrepid Sea, Air and Space Museum	New York Botanical Gardens	World Wildlife Fund
Financial Information source	IRS 990 07.01.19-06.30.20	Colgate University	IRS 990 01.01.19-12.31.19	IRS 990 01.01.19-12.31.19	IRS 990 07.01.19-06.30.20	IRS 990 07.01.21-06.30.22
Total revenue	$255,583,692	Auditors consolidated report June 2020	$89,977,530	$32,020,156	$87,624,994	$381,636,162
Total contributions and grants	$193,870,983	$222,676,000	$39,351,332	$5,412,291	$53,505,362	$353,794,252
% Revenue from contributions and grants	76%	$18,012,000	44%	17%	61%	92%
Total operating expenses	$298,619,522	8%	$79,996,924	$33,549,147	$83,217,286	$316,378,290
Fundraising expenses	$10,738,038	$210,169,000	$4,327,595	$1,631,321	$6,707,269	$49,356,047
% of expenses from fundraising expenses	4%	/	5%	5%	8%	16%
Fundraising Staff	45 global resource team	/	/	10	22 total, 6 individual giving	72 total development staff, 25 individual giving
Endowment	$396,000,107	/	$473,458,005	$31,335,945	$354,631,393	$227,484,277

Source: ABA Interviews and IRS990 forms

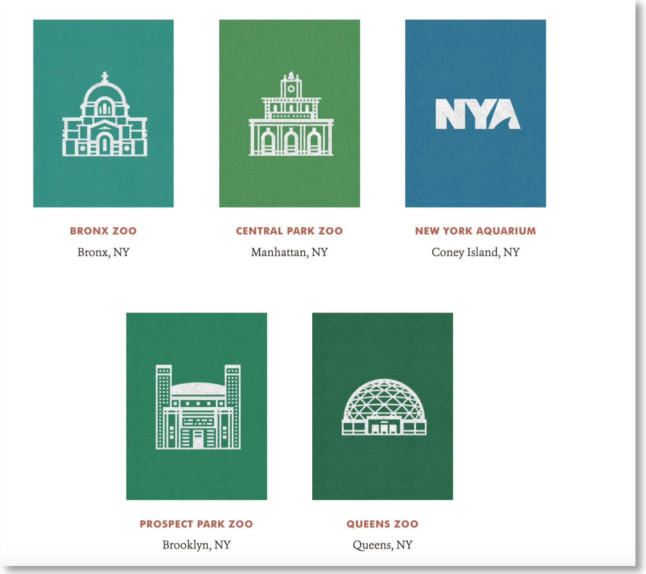
Appendix- WCS Organization Overview

Wildlife Conservation Society

Overall Organization Profile

Wildlife Conservation Society (Consolidated auditors Report June 2020_)	
Total Operating Budget	$298,619,522
Total Revenue	$255,583,692
Total Contributed Income	$193,870,983
% of Budget covered by contributed income	Approximately 65%

- WCS as an organization has over 4000 staff
- WCS runs 4 zoos and 1 aquarium in NYC, plus global funding projects
- Have staff spread across the world, the majority of whom are focused in NYC at the Bronx Zoo HQ
- 45-person Global Resources team handle all the private fundraising for WCS at large
- Global Resource team all NY based apart from 1 person- they raise funds for both for the zoos and the global work
- Welcome approximately 4M people to their zoos and aquarium



Source: ABA Interviews and IRS990 forms

Appendix- WCS Advancement Team

Detail WCS's Global Resource Team

- Global Resource Team is split into three main pillars-
  - Individual Giving
  - Strategic Operations
  - Institutional Advancement.
- 4-person donor communications lives within the Strategic Operations teams. They manage reports and other written content for donors.
- Within the individual giving pillar:
  - major gifts (7 people), annual fund (3 people) and planned giving (2 people)
- Within major gifts:
  - Senior Director, Individual Giving, Western Region; Director, Individual Giving; two MGOs; three support people (two admin and one prospect qualification)

Source: ABA Interviews

Appendix- WCS Fundraising Priorities & Meetings

Wildlife Conservation Society

Determining Fundraising Priorities

- Ideally WCS would like to fundraise more based on institutional needs first that are determined at the staff level and brought to their EVP and Finance team to set the agenda for fundraising priorities.
- However, the organization structure is a bit complicated, so the reality is more donor driven. Funding opportunities usually come from conversations with donors.
- Gift officers need to be aware of the organization's full programming to be able to direct donors to the right program people and right project based on their expressed interest.

Meetings and Communications

- Major gifts team meets biweekly, discussing donor strategies to workshop them amongst the team. The also discuss new funding opportunities and lessons learned.
- Weekly meeting with each MGO
- Weekly individual giving team meeting at large to talk about priorities.
- Between Directors of Individual Giving and the associates providing administrative support, they have visibility into every fundraising conversation happening on the team, so can determine any potential overlap.
- They also have a major gifts slack channel where they put relevant news stories / bring new ideas.

Source: ABA Interviews

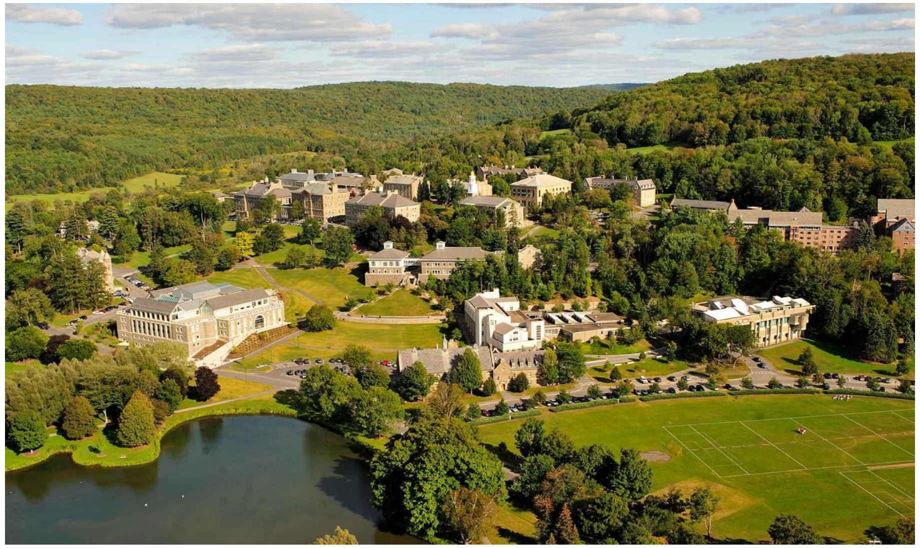
Appendix- Colgate University Overview

Colgate UNIVERSITY

Overall Organization Profile

Colgate University (IRS 990 07.01.19-06.30.20)	
Total Operating Budget	$210,169,000
Total Revenue	$222,676,000
Total Contributed Income	$18,012,000
% of Budget covered by contributed income	Approximately 8.5%

- University of approximately 3,200 students
- University is currently in their *Third-Century Plan* – which aims to raise $1 Billion in support for a full campus transformation
- Initiatives of the *Third-Century Plan* include attracting and supporting outstanding students, strengthening the university's academic enterprise, enriching the student experience and improving the campus and environment.
- The Colgate Fund is their main annual unrestricted pool where they currently aim to $9.5 million (this year's goal).



Source: ABA Interviews and consolidated auditors report

Appendix- Colgate University Advancement Team

Colgate UNIVERSITY

Detail on Colgate's Advancement Team Structure

- The whole division of advancement is pushing 60 staff
- Major gifts - 9 MGOs + department admin (10 total).
- Leadership gifts - 4 total: Director, 2 GOs, 1 admin
- Prospect management /research/analytics: Director + 4 staff members
- Principal gifts has its own AVP - she oversees the principal gift team, and that should stand separate because they work with our president for gifts of $1 million or more. She oversees 2 PGOs + a department admin.
- The relationship development team really sits with the data. They're looking at our database, our prospects, and going out in the public domain and doing wealth screening.
- We have the proposal writer in the advancement division who does bespoke proposals for donors, but she'll also do one-pagers that are just general content about the university.
- The Comms team has two team members who are dedicated to advancement comms. They report to comms but work extensively with us. They'll take the lead in writing project-specific cases for support.

Colgate Advancement Office

Fundraising team
- Annual giving
- Donor relations
- Leadership gifts
- Major gifts
- Principal gifts
- Senior Proposal Writer

Engagement team
- Alumni relations
- Donor relations
- Athletic fundraising and engagement
- Relationship development

Operations
- Gift records and processing
- Online community management

Source: ABA Interviews

Appendix- Colgate University Meetings

Colgate UNIVERSITY

Regular Advancement Team Meetings

- Every other week campaign strategy meeting with all senior leadership from Advancement
- Each gift officer meets with their manager and the prospect management professional quarterly, at a minimum. These meetings are an opportunity to go through their portfolio and think strategically about who to push, who to drop (moves management review of sorts)
- Each frontline team meets once a week
- Monthly meeting with all frontline teams together with donor relationships, talking about things related to the frontline.
- Every other month the whole advancement division comes together on campus to talk high level about emerging topics in the campaign. (Important onsite activation especially with high numbers of remote staff)

Regular Meetings with Natural Partners i.e., Leadership, Finance and Communications

- Outside of the advancement division – senior level meeting with President, finance, provost, etc. to look at how the university is resourced. These strategic meetings help determine timing of capital projects.
- AVP Campaign, AVP of principal gifts, and the President meet monthly about campaigns.
- Weekly meetings with the President on folks in his portfolio.
- “Natural Partners” meet 2x monthly. Groups includes: Provost and leaders from Advancement. We talk about particular strategic opportunities.
- We meet regularly with finance and the president’s office
- Throughout the campaign the VP of Comms meets with us regularly to make sure information is getting pushed out and that people are owning what they need to own. They help us tell stories of big gifts we secure.

Source: ABA Interviews

Appendix- Intrepid Sea, Air & Space Museum Overview

INTREPID
SEA, AIR & SPACE MUSEUM COMPLEX

Overall Organization Profile

Intrepid Sea, Air and Space Museum (IRS 990 01.01.19-12.31.19)	
Total Operating Budget	$33,549,147
Total Revenue	$32,020,156
Total Contributed Income	$5,412,291
% of Budget covered by contributed income	Approximately 16%

- 1M annual visitors
- 486 total people employed (FY19 IRS990)
- 29 staff in the executive team and department directors
- Many of their fundraising project revolve around exhibits, but also maintenance of old ships, planes etc.

Source: ABA Interviews and IRS990 forms

Appendix- Intrepid Sea, Air & Space Museum Advancement Team

Detail on the Intrepid Museum's Advancement Team Structure

- Advancement is split between 3 core teams, Individual Giving, Corporate& Foundations, and Advancement Events
- Department headed by VP of Institutional Advancement that oversees Individual Giving, Corporate & Foundations and Advancement Events.
- Government & Grants lives in a separate department, with its own VP.
- Within Individual Giving there is also the Museum's membership program, as well as the Intrepid's Former Crew Member relations department.
- The Individual Giving team includes: Director who is responsible for gifts $1K and above as well as overseeing Museum membership and Former Crew Member relations. A manager who is responsible for gifts under $1k and also works on membership. One associate who handles member relations and another associate who handles Former Crew Member relations.
- The advancement team also has a manager of development content (who also does prospect research) as well as a manager of data & operations.

Staff wish-list and having more supporting roles for advancement

The Intrepid Museum does not have a development communications department- and all reports and materials for gift officers are handled internally by development.

Having a development comms team would be high on their list to improve gift officer efficiencies.

The current part-time researcher for development will start in a writer role soon, which will further support the needs of the department and gift officers.

Source: ABA Interviews

Appendix- Intrepid Sea, Air & Space Museum Fundraising Priorities & Meetings

INTREPID SEA, AIR & SPACE MUSEUM COMPLEX

Determining Fundraising Priorities

- The project more often comes first.
- As a smaller institution there are fewer opportunities and scale to cater projects to the donor needs. More about aligning donors with existing projects and needs.
- In terms of determining the target amount to raise for projects - that involves several conversations with various departments depending on the specific project. Including VP and Director level positions in Institutional Advancement, Education, Exhibits & Collections.
- The final decision however in terms of departmental budgeting and priority decision making falls with the VP of Institutional Advancement, the CFO and President. .

Regular Advancement Team Meetings and Progress Reports

- The Institutional Advancement team has monthly in-person department meetings.
- Weekly VP level meetings with the department executives provide departmental updates and larger strategic conversations.
- During weekly check-ins between the Direct of Individual Giving and direct reports and the VP of Institutional Advancement, the team covers daily conversations, as well as projects and updates.
- Bi-weekly inter-department meetings with various departments. In between those meetings there is a constant flow of emails and conversations.
- Advancement meets with Education in a standing biweekly meeting, but also when funding is specifically project related they have different project-related committees and operations is brought in for these meetings as well
- In terms of reporting on progress this has become more systematic since the team has brought on a manager of Data Operations. The position was vacant for 6 months which impacted the frequency and ability of the team to pull necessary reports.

Source: ABA Interviews

Appendix- New York Botanical Garden Overview

NYBG
New York Botanical Garden

Overall Organization Profile

NYBG (IRS 990 07.01.19-06.30.20)	
Total Operating Budget	$83,217,286
Total Revenue	$87,624,994
Total Contributed Income	$53,505,362
% of Budget covered by contributed income	Approximately 64%

- Beginning in February 2022, NYBG has been engaged in creating a new strategic plan
- New strategic plan will be implemented between 2024 and 2030.
- All together 22 people in advancement
- 881 total people employed IRS990

Source: ABA Interviews and IRS990 forms

Appendix- New York Botanical Garden Advancement Team

NYBG
NEW YORK BOTANICAL GARDEN

Detail on the NYBG's Advancement Team Structure

- All together- 22 people in advancement as whole
- With current structure they have a 6 people in the individual giving team: Associate Vice President for Individual Giving, Planned Giving Director, one major gift officer and 3 people whose core responsibility is managing donors from our patron programs (member above 1500$ a year)
- Unfilled position on hold for another MGO who would be working ideally at the major level- start at the 10-25K range (on hold till next fiscal year)
- Lower-level membership under 1500 $ is managed by membership team
- 4 ppl on special events team of whom 2 work as gift officers in some way with donors who regularly give to events
- Operations team that deals with database- that has 6 people
- 4 ppl for foundation relations teams and government grantors and corporate giving team is within marketing and they are 2 ppl- sponsorship for exhibition

Shifting funding prioritization will change the makeup of the individual giving team

In general our donors are giving through programs like patrons programs or special events and planned giving that make up the majority our individual fundraising.

As they shift to more project related fundraising, they hope to target more donors from the project angle and therefore are looking to increase the size of their individual Giving team with more gift officers.

Source: ABA Interviews

Appendix- New York Botanical Garden Fundraising Priorities & Meetings

NYBG
New York Botanical Garden

Determining Fundraising Priorities

- In terms of fundraising priorities the NYBG has historically operated under a more top-down determination around what was in plan and not in plan – as dictated by President's office
- The main focus of fundraisers has therefore been for unrestricted general fund gifts and semi-restricted funds for ongoing major work/ core pillars.
- Not many new projects until last couple months- they are starting to shift towards more project-based fundraising
- Big challenge with former structure focused on long-term pre-determined funding "buckets" was not being as reactive to add new incremental funding for new things and ongoing needs
- Now with the plan to be more project based, they hope to tap into more target donor interests and will increase the number of gift officers to support new strategies

Regular Advancement Team Meetings

- There is a segmentation that is quite clear of who handles what and whom
- Segmentation of donor base means they don't have to meet all that often across different working teams
- Majority of meetings more around regrouping to overview prospect management and working with special events teams to connect on the individuals giving to those events
- Chief Advancement and President's office work on current trustees, and collaborate with the heads of each advancement sub-team on the pipeline for surfacing new trustees and managing very high level principal gift prospects who would be solicited by president
- Hybrid work- Onsite 3 days a week, off site 2- therefore as a team primarily communicating via email and in weekly video calls

Source: ABA Interviews

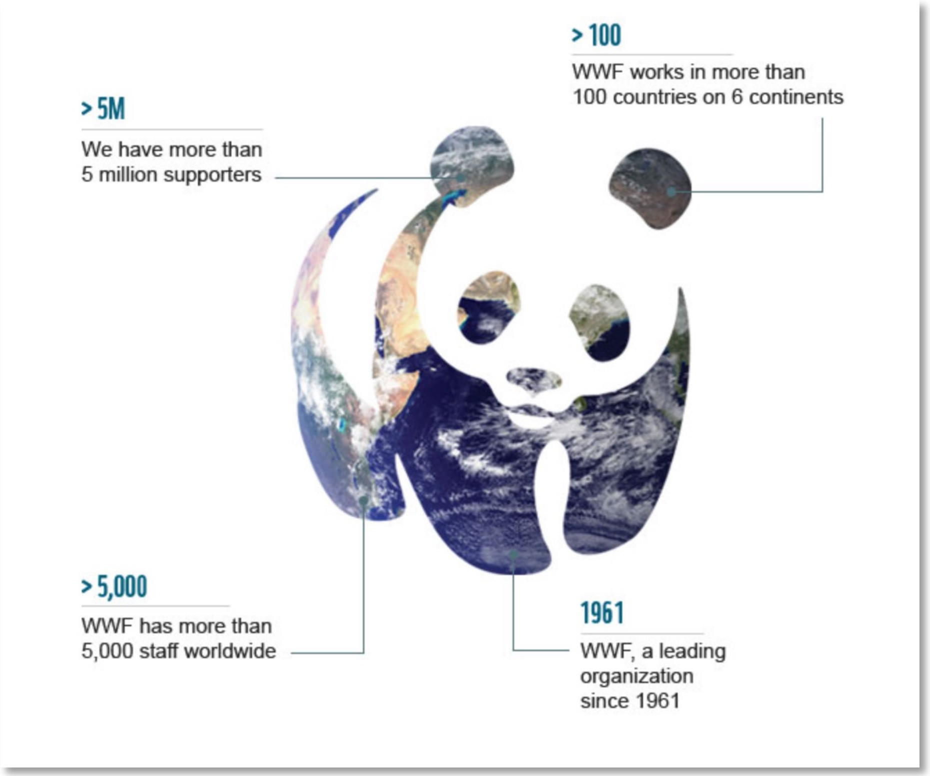
Appendix- World Wildlife Fund Overview

WWF

Overall Organization Profile

WWF (IRS 990 7/1/21-6/30/22)	
Total Operating Budget	$316,378,290
Total Revenue	$381,636,162
Total Contributed Income	$353,794,252
% of Budget covered by contributed income	Approximately 111%

- 5M members worldwide, of which 1M in the US
- Leading conservation organization working in 100 countries
- More than 5,000 staff worldwide
- Almost entirely supported by contributed income



Source: ABA Interviews and IRS990 forms

Appendix- World Wildlife Fund Advancement Team

Detail on the WWF-US Advancement Team Structure

- The development shop is comprised of about 72 people. It includes the following teams:
  - Board/council relations
  - Foundations
  - Annual giving
  - Other support functions (development events, donor communications and stewardship)
  - Individual giving (major gifts and gift planning) – team with 25 people
- Director of Individual Giving Operations manages team of coordinators who support the gift officers so they can focus on donor cultivation and stewardship.
- We have a donor comms and stewardship team within development, and we have prospect research and management. Those two teams are very much about supporting the MGOs.
- The donor comms shop works closely with the program side to generate reports and collateral that's available to the MGOs to use. Donor comms also works with gift officers directly on proposals and reports
- 4 MGOs on the West coast, 3 in central region, 4 based in DC in addition to VP-Individual Giving. We also have two principal gift officers based in DC though they do not report to the Individual Giving VP.

Gift Officers supported by a pool of ambassadors

WWF has two levels of Gift Officers. Juniors ones have more prospects and suspects in their portfolios versus their senior colleagues with more established donors.

They also have a 125-person national council who work as program ambassadors and are often well connected to the donor pool. They are parsed out across different portfolios and tend to go support the senior portfolios with bigger donors.

Source: ABA Interviews

Appendix- World Wildlife Fund Fundraising Priorities & Meetings

WWF

Determining Fundraising Priorities

- Predominantly donor-based- connecting donors to their interests among WWF core conservation pillars (e.g., fresh water, oceans, climate, wildlife, food)
- Program side determines what the project portfolio would look for each core pillar with for example 10 things they aim to achieve
- Advancement then focuses on those objectives and creates a plan to connect donors most interested across all advancement sections.
- Staff from Individual giving, foundations and corporate teams and government come together to report on which donors they have in their portfolios and align them with the projects most interesting.
- For example, sometimes individual might not have a donor for a specific area, but corporate has companies interested in a particular topic

Diverse and Repeat Engagement with Programming

- WWF organizes large retreats bringing together all major goal teams with gift officers
- Each team gets 15 mins to rapid fire present their goals for the next few years
- They organize these retreats when program staff come from other countries and do development-specific brown bag lunches so gift officers can ask questions and get a better overview of the stories they should be sharing with donors
- They take program staff on donor visits.
- They also have salons around the country hosted by donors, and feature a program and a program expert.
- Very intentional about putting program staff in front of the gift officers when they can. Usually a big focus of their retreats.

Source: ABA Interviews