GROWING INDIVIDUAL CONTRIBUTIONS TO SCIENCE CENTERS

OVERVIEW

- The importance of individual giving in the contributor mix
- Meaningful connections based on donor motivations
- Moves management
- Creating a culture in support of individual giving
- Q&A

PANELISTS

Erin Graham, VP Development, Oregon Museum of Science and Industry
- Operating budget: $20M – Annual attendance: 1,000,000

Kristin Priscella, Chief Development Officer, Arizona Science Center
- Operating budget: $12M – Annual attendance: 500,000

Jennifer McMenamin, Sr. Director of Development & Marketing, Sci-Port
- Operating budget: $3.4M – Annual attendance: 200,000
WHY FOCUS ON INDIVIDUAL CONTRIBUTIONS?
- Individuals give more than companies and foundations
- Part of healthy organizational funding mix
- Faster growth and resiliency in downturns
- Individuals are the decision makers even in corporate and foundation
- Planned gifts and future changes in retirement savings plans
- Campaign capacity and readiness

GIVING INSTITUTE 2013: $335.17 BILLION

HOW CAN YOU CONNECT WITH YOUR DONORS IN A MEANINGFUL WAY?
- Focus on how your organization helps solve community problems (case messaging)
- Identify their interests and motivations
- Engage them in the ways they prefer
- Create the underlying systems to manage the relationship
7 FACES OF PHILANTHROPY

- The Communitarian: Doing Good Makes Sense
- The Devout: Doing Good is God’s Will
- The Investor: Doing Good is Good Business
- The Socialite: Doing Good is Fun
- The Altruist: Doing Good Feels Right
- The Repayer: Doing Good in Return
- The Dynast: Doing Good is a Family Tradition

From The Seven Faces of Philanthropy: A New Approach to Cultivating Major Donors (Jossey-Bass Nonprofit & Public Management Series)

CHANGING DONOR DEMOGRAPHICS AND HOW THEY LIKE TO BE ENGAGED

- Donor replacement, wealth transfer to younger generations
- Desire of younger generations to be more hands on
- Behaving more like corporate/foundational partners with respect to data & metrics

OMSI DONOR ENGAGEMENT

- Events vs. individual meetings
- Compelling general case messaging (versus restricted projects)
- Asking for advice
- Longer cultivation timelines
- Honoring the past for the sake of the future
OMSI DONOR ENGAGEMENT

- Coordinating communications and events

ASC DONOR ENGAGEMENT

- Board
  - Trustee Roles and Responsibilities
  - Opportunities for volunteer leadership
  - Leverage their rolodex

ASC DONOR ENGAGEMENT

- Staff
- Volunteers
- Current Donors
- Prospects
ASC DONOR ENGAGEMENT

- Staff
  - Development Training & Modeling
  - Employee Giving Program
  - Accolades

- Volunteers
  - Opportunities for volunteer leadership
  - Know your volunteers

ASC DONOR ENGAGEMENT

- Current Donors
  - Opportunities to engage their employees
  - Testimonials

SCI-PORT DONOR ENGAGEMENT - A SMALL SCIENCE CENTER APPROACH

- DNA Society
  - “Rolling calendar” annual fund
  - Spring cocktail party
  - Annual dinner
  - Highly personalized written contacts and calls
  - Small base allows for shorter cultivation cycles
SCI-PORT DONOR ENGAGEMENT - A SMALL SCIENCE CENTER APPROACH

- Board and Committees
  - Alumni board
  - Board connections
  - Multi-generational

HOW CAN YOU LEVERAGE DONOR MOTIVATIONS IN MOVES MANAGEMENT?

- Portfolio size and approach
- Number and types of contacts per year
- Segmentation and solicitation
- Research and qualification

OMSI MOVES MANAGEMENT

- Planning with gift pyramids and long-term goals
- 150 donors per prospect manager (50/50/50)
- Focusing on the “Top 25”
- Weekly major donor strategy meetings
- Moving donors to the annual fund
- Formalized research process
- Data tracking and accountability
MAJOR DONOR STRATEGY MEETINGS

<table>
<thead>
<tr>
<th>Meeting Date</th>
<th>Meeting Time</th>
<th>Meeting Location</th>
<th>Meeting Owner</th>
<th>Invited Attendees</th>
<th>Additional Attendees</th>
<th>Grants</th>
<th>Individual</th>
<th>Corporate</th>
<th>Gala</th>
<th>Other</th>
</tr>
</thead>
</table>

FORMALIZED RESEARCH PROCESS

- Prospect Identification Date: ________________
- Form Originator: ____________________________
- Prospect Manager: ____________________________
- Prospect Source (staff/board/news): ________________

- Name: ____________________________
- RE#: ____________________________
- Business Address: ____________________________________________
- Personal Address: ____________________________________________
- Business/Organization: ________________________________________
- Profession/Title: ____________________________________________
- Spouse/Partner Name: ________________________________________
- Spouse/Partner's Business/Organization/Affiliations: ________________
- Children: [Names if known, son or daughter, born or deceased dd/mm/yyyy]

- Known Friends, Close Associates, Board Member: ____________________________

- OMSI Involvement: ________________________________________________
- OMSI Giving History: $_______________________

MATCHING SOLICITORS TO DONORS

- Process of matching people
- Team approach to individual goal
- Portfolio assignments
- Relationship mapping – how does it work
- Research without a big research team
- Good data
- Getting others engaged across museum
SCI-PORT MOVES MANAGEMENT - A SMALL SCIENCE CENTER APPROACH

- Organization’s strategic plan
- Bite-sized planning
- Monthly development committee meeting
- Use what you have to its fullest
- Create unique opportunities (moves)

HOW CAN YOU CREATE A CULTURE OF PHILANTHROPY TO SUPPORT INDIVIDUAL GIVING?

- Most people in the organization (across positions) act as ambassadors and engage in relationship building
- Everyone promotes philanthropy and can articulate a case for giving
- Fund development is viewed and valued as a mission-aligned program of the organization
- Organizational systems are established to support donors
- The executive director is committed and personally involved in fundraising

Definition from UNDERDEVELOPED; A National Study of Challenges Facing Nonprofit Fundraising by CompassPoint

SCI-PORT CULTURE OF PHILANTHROPY

- Board
- CEO
- Development staff; senior management
- Celebrate successes at all levels
- Eliminate negativity; create positive perception
ARIZONA SCIENCE CENTER CULTURE OF PHILANTHROPY

- Top Down Approach
- Inter-departmental engagement and training at all levels
- Testimonials
- Make it easy to give

OMSI CULTURE OF PHILANTHROPY

- Staff giving – time and money
- Visibility for accomplishments
- Alignment and relationship building across the museum
- Executive Director attends all donor strategy meetings
- Board and committee participation
  - Board toolkit: case messaging, staff contact
  - Statement of Intent
  - Board champions
  - Deep engagement through meaningful feedback

WHERE DO YOU START?

- Identify a board or leadership champion
- Organize so gift officers do not feel overwhelmed by their portfolios
- Create gift pyramid of today and where you want to go
- Create a sense of shared ownership for the staff and board for fundraising goals
- Eliminate “one size fits all” approach to individuals – personalize strategies
- Devote resources to research and planning ways to engage individuals leading up to the ask
- Ask for advice from previous supporters