



**School for Advanced Research
Development Committee Meeting
Thursday, August 2, 2018, 3:00-4:30 pm
Eric S. Dobkin Boardroom
Agenda**

1. Review and Approve Minutes from July 11, 2018
2. Discussion of Campaign Planning with Richard Moe, Former President of the National Trust for Historic Preservation (bio attached)
3. Review Phase I and Campaign Readiness Assessment for SAR
4. Review Development Committee Report in the Board Packet
 - Narrative report
 - Giving Summary
 - Comparison Charts
 - Alpha list of donors (with new *)
 - Business Sponsors
 - Grants Submission Calendar
5. Review FY19 Development Plan
6. New Business

Upcoming Development Committee Meetings (Second Tuesday of the Month):

- Tuesday, September 11, 3:00pm - 4:30pm
- Tuesday, October 9, 3:00pm - 4:30pm
- Tuesday, November 13, 3:00pm - 4:30pm



**School for Advanced Research
Development Committee Meeting**
July 11, 2018, 3:00-4:30 pm
Reception Center Meeting Room
Minutes

Attendees: Julie Rivers, Committee Chair; Louise Lamphere (via phone); Dorothy Bracey; Meg Lamme; Elizabeth Roghair (via phone), Lynne Withey (via phone)

Staff: Michael Brown, President; Laura Sullivan, Dir. of Development; Lindsay Archuleta, Donor Relations Manager; Suzanne Grayson, Executive Asst. to the President; Sharon Tison, VP for Finance and Administration.

Not in attendance: Jerry Sabloff, Joe Colvin, Angela Gonzales, Jim Robins

1. Review and Approve Minutes from June 12, 2018
Laura stated that a correction to the membership report, indicating a 15% percent increase, (not 30%), the minutes were approved as presented.
2. Summary:
 - a. Review EOY Appeals, Gift Subtype Report, Membership Report, Grants Report, and Business Sponsors
Laura stated that SAR met goal again this year and raised \$865,844 toward goal of \$850,000. The IARC 40th fundraiser netted about \$65K. Laura reviewed most of the grants in detail. Michael mentioned that the Anne Ray Foundation may change their support in the future. Michael also mentioned his meeting with the Paloheimo Foundation and possible Paloheimo Fellowship. Laura reviewed the *Gift Sub-Type report* which shows all giving has increased, except for field trips. There was a request to distribute the list of spring appeal donors to the committee. Laura reviewed membership, up 12%; and business sponsorships for FY19.
 - b. Review Reports for Board Packet
Laura and the committee discussed what would be included in the board packet; gift subtype report, business sponsors, NXT overview graphs.
3. Presentation of Development Plan for FY19
Laura acknowledged Lindsay Archuleta on all her work on the 40th event. Laura reviewed the eight new goals for 2018-19. Fundraising goal for 2018-19 is \$880K. There was a suggestion to revise Goal 4 to include verbiage "determine readiness...". There was a discussion about a June 2019 event. There was a question about when the timeline for "Phase I" of a possible campaign would be ready. Laura suggested that she collapse goal 5 into goal 2 (to include membership as part of the annual fund) and goal 6 into goal 3 (to include board fundraising in major gifts). Laura mentioned her meeting with Richard Moe who offered to share his advice on National Trust for Historic campaigns.
4. New Business
With no new business, the meeting was adjourned at 4:35pm.

Richard Moe Biography

Born: Duluth, Minnesota, November 27, 1936

Educated:

Williams College, BA, 1959

University of Minnesota Law School, J.D., 1966

Professional Activities:

Chairman, Minnesota Democratic Farmer Labor Party, 1969-1972

Chief of Staff to Senator Walter F. Mondale, 1972-1977

Chief of Staff to Vice President Walter F. Mondale and member of
President Carter's senior staff, 1977-1981.

Partner, Davis Polk and Wardwell, Washington, D.C., 1981-1992

President, National Trust for Historic Preservation, Washington, D.C.
1993-2010

Boards:

Ford Foundation, 1998-2010

Historic St. Mary's City Commission, chairman, 1999-2010.

Advisory Council on Historic Preservation (federal), 1993-2010

Conservation Lands Foundation, Durango, CO., 2007-present

Finca Vigia Foundation, Boston, 2010-present

Honors:

Honorary Degrees:

The University of Maryland

The University of Minnesota

St. Mary's College (Maryland)

The Vincent Scully Prize, The National Building Museum, 2007

The Louise DuPont Crowninshield Award – The National Trust for
Historic Preservation, 2013

The Theodore Roosevelt-Woodrow Wilson Award from the American
Historical Association as “an individual outside the historical profession who [has]
made a significant contribution to the study, teaching and understanding of history.”

Publications:

Roosevelt's Second Act – The Election of 1940 and the Politics of War (Oxford University Press- Pivotal Moments in American History Series), 2013.

The Last Full Measure – The Life and Death of the First Minnesota Volunteers (Henry Holt, 1993; Minnesota Historical Society Press, 2001).

Changing Places – Rebuilding Community in the Age of Sprawl, co-author (Henry Holt, 1997).

Personal:

Married to Julia Neimeyer, 1964

Children: Eric (deceased), Andrew, Alexandra

Occupation: Writer

National Trust's chief retiring

By Philip Kennicott
Washington Post Staff Writer
Wednesday, November 4, 2009

There are few pulpits bullier than the one Richard Moe, president of the National Trust for Historic Preservation, has held for more than 16 years. But citing the need for generational change, and his own desire for retirement, Moe, 72, has announced he will step down from the group he helped make the most powerful voice for historic preservation in the country.

Moe, who also served as Walter Mondale's chief of staff in the Senate and when Mondale was vice president, will leave the trust as soon as a replacement can be found, probably in the spring. When he leaves, he will have been the longest-serving president in the trust's 60-year history, a tenure distinguished by organizational growth and dramatic victories.

When Moe came to the trust in 1993, it had an annual budget of \$29.2 million, a substantial portion of which came from the federal government. After watching the organization's time and resources consumed in regular battles to preserve that money -- Tom DeLay led a failed effort to zero out the trust's appropriation in 1995 -- Moe decided to wean his group from federal support. It was a bold move, and it signaled a larger cultural change.

"We are now much more creative, much more entrepreneurial," says Moe, who broke the news officially to his staff Tuesday afternoon. Despite the loss of \$7 million in annual government funding, the trust's budget grew, to \$55 million, and Moe spearheaded two capital campaigns that saw the trust's endowment rise from \$33 million to \$232 million at the height of the economic boom in 2007.

The organization also had a freer hand to advocate, and in many cases, directly oppose the government in battles to preserve important buildings and sites.

"We couldn't be an effective advocate in the Congress as long as we were up there doing our own special pleading," said Moe on Tuesday.

But it was a battle against the Mouse that showed the new focus and force Moe was marshaling at the trust. In 1993, the Walt Disney Co. announced plans to build a \$650 million theme park on a 3,000-acre tract near the small town of Haymarket, complete with two golf courses, a water park and campground, plus more than 1,000 hotel rooms and almost 2 million square feet of commercial space. There was strong support for the park at all levels of government, and among Virginia residents who anticipated significant economic benefits. But the park would have been only a few miles from Manassas National Battlefield Park, and its presence would have significantly changed the character of one of the most important historical grounds in the country.

"Nobody in the preservation movement saw this immediately as a preservation issue," Moe says. "That plot of ground at Haymarket had no historic structures, nor had anything historic occurred there. So why is this a historic preservation issue?"

Working with a group of well-connected Washington insiders, Moe built a powerful case against the park, for its larger environmental, historical and aesthetic impact. By 1994, Disney was in the middle of a public relations nightmare, with some of this country's most popular and recognized historians (David McCullough, James McPherson, Arthur Schlesinger Jr.) allied against the park. By September 1994, the Mouse blinked, and the park was never built.

"Dick saw that the real need was to save neighborhoods and communities, to save whole towns, and he transformed the preservation cause in America as much as any one person possibly could," says McCullough, who was the first person Moe invited to join the NTHP board after he became president.

That holistic approach to preservation has defined the trust's strategy during Moe's tenure. In the years since the Disney fight, the trust has helped shape the national dialogue not just on preserving historic buildings, but on suburban sprawl, environmental issues and sustainability, and urban design. After Hurricane Katrina devastated New Orleans in 2005, the trust moved quickly to direct resources into the region and it worked to prevent federal funds from being used for wholesale demolition.

Rep. Michael R. Turner (R-Ohio) cites Moe's response to Katrina as one the trust's signal accomplishments. He also worked with Moe during reauthorization of federal preservation legislation to prevent important historic review provisions from being stripped from the law.

"He is incredibly knowledgeable and very persuasive, and he not only has positions, he has accomplishments," Turner says.

"Preservation is much more widely accepted now than it was 15 or 20 years ago," Moe says. "Developers don't look at demolition as the first option as a rule, they look at the possibility of adaptive reuse and renovation."

But it hasn't all been wins. Moe, who cites the renovation of President Abraham Lincoln's cottage in the District as one of his career highlights, also remembers the loss of the Mapes Hotel in Reno, Nev., a storied art-deco site that hosted a laundry list of celebrities in the 1950s and '60s. And despite working in New Orleans to help preserve and rebuild historic neighborhoods, the trust is currently fighting the U.S. government in court to prevent the demolition of substantial parts of the Mid-City Historic District, where two hospitals are to be built.

Beyond the high-profile battles, Moe was doing the nuts-and-bolts work of building the trust's national presence, including substantial assistance to a wide network of nonprofit organizations that do much of the local heavy lifting on preservation issues. John Nau, the chairman of the federal Advisory Council on Historic Preservation, says that among Moe's greatest legacies are the expansion of the trust's national network and its institutional health.

"Is it in good shape, does it have a good board, good staff and financial strength? Dick leaves it with all of those," Nau says. "He built a tremendous platform."

Moe says that after his replacement is found, he plans to spend more time in the West, where he has a house in the San Juan Mountains of Colorado. His book, "The Last Full Measure: The Life and Death of the First Minnesota Volunteers," was published in 1993, and he hopes to return to writing.

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SAR Appeals Report: FY2018 Summary

July 1, 2017 - June 30, 2018

Appeal Description	Goal: FY19 for FY20	Actuals Cash Paid & Pledged-FY17 for FY18	Goal: FY18 for FY19	YTD Total Raised	YTD to Goal (FY18 for FY19)	% YTD to FY19 Goal	Details	Audience	Increase/Decrease	Strategies/ Notes
CONTRIBUTED UNRESTRICTED FUNDS										
FY18 Unsolicited Gifts	\$ 5,000.00	\$ 27,606.71	\$ 5,000.00	\$ 197,928.88	\$ 43,716.86	874%	Unexpected bequests and gifts; \$22,500 in in-kind gifts and services; \$164,640.03 unexpected bequest from Overstreet, of which 80% is reserved for the endowment and 20% will be applied to operations for FY19		\$ (22,606.71)	Bequests
FY18 End of Year Direct Mail Appeal	\$ 45,000.00	\$ 44,459.13	\$ 45,000.00	\$ 45,370.25	\$ 45,370.25	101%	70 donors	LYBUNTS SYBUNTS and Prospects	\$ 540.87	Direct mail solicitations: Follow-up by phone calls.
FY18 End of Year Email Appeal	\$ 10,000.00	\$ 9,010.00	\$ 10,000.00	\$ 8,550.00	\$ 8,550.00	86%	21 donors	LYBUNTS SYBUNTS and Prospects	\$ 990.00	3 EOY e-appeals
FY18 End of Year Direct Mail Appeal Alumni	\$ 6,000.00	\$ 5,870.00	\$ 6,000.00	\$ 2,100.00	\$ 2,100.00	35%	8 donors		\$ 130.00	Targeted focus on alumni
FY18 End of Year Email Appeal Alumni	\$ 4,000.00	\$ 1,985.00	\$ 2,000.00	\$ 4,540.00	\$ 4,540.00	227%	18 donors		\$ 15.00	Targeted focus on alumni
FY18 Spring Direct Mail Appeal	\$ 15,000.00	\$ 15,100.00	\$ 12,000.00	\$ 12,131.00	\$ 12,131.00	101%	21 donors		\$ (3,100.00)	Focus on specific project
FY18 Spring Direct Mail Appeal Alumni	\$ 1,000.00	\$ 250.00	\$ 1,000.00	\$ -	\$ -	0%	0 donors		\$ 750.00	Targeted focus on alumni
FY18 Spring Email Appeal	\$ 1,000.00	\$ -	\$ 3,000.00	\$ 1,350.00	\$ 1,350.00	45%	4 donors		\$ 3,000.00	2 e-appeals in spring
FY18 Spring Email Appeal Alumni	\$ 1,000.00	\$ -	\$ 1,000.00	\$ 2,600.00	\$ 2,600.00	260%	2 donors		\$ 1,000.00	Targeted focus on alumni
FY18 Fundraising Events	\$ 15,000.00	\$ 46,800.00	\$ 25,000.00	\$ 62,145.95	\$ 61,345.95	245%	1 anchor event in early summer; 2-3 smaller events; \$800 in-kind donation for Balsaer's hosting Collections of Distinction; \$54,093.88 net from IARC 40th event including business sponsorships and \$32,752 in revenue from the board.	Past attendees, Major Gifts Prospects, Current Donors, and LYBUNTS/SYBUNTS of \$250+	\$ (21,800.00)	IARC 40th Anniversary event (net \$10,000); Collections of Distinction event (\$2,500)
FY18 Schwartz Memorial		\$ 4,790.00	\$ 20,000.00			0%	Goal to raise \$100,000 for Schwartz Memorial Fund (80% to endowment, 20% to operating)		\$ 15,210.00	Public Memorial on 8/27/16; welcome gifts in honor/memory of Doug Schwartz
FY18 Cultivation Events	\$ 2,500.00	\$ 1,650.00	\$ 2,500.00	\$ 1,000.00	\$ 1,000.00	40%	5 new donors	New Prospects (non-donors), Lapsed donors (more than 3+ years)	\$ 850.00	1-2 cultivation events. Special mailings with invitations; personal invitations by board.
FY18 Personal Solicitations	\$ 150,000.00	\$ 124,375.00	\$ 125,000.00	\$ 128,575.00	\$ 128,575.00	103%	5 additional new donors, average \$5,000 ea. Implement Founders' Society.	Target 25-50 Major Gifts Prospects	\$ 625.00	Personal cultivation and solicitations by Board and Staff Leadership (including asks of former board)

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FY18 Unrestricted Individual Giving	\$ 10,000.00	\$ 22,076.25	\$ 25,000.00	\$ 11,989.65	\$ 11,989.65	48%			\$ 2,923.75	
FY18 Field Trips				\$ 2,200.00	\$ 2,200.00		Donation portion of field trips. \$250 is from current board members.			
FY18 Board Giving	\$ 400,000.00	\$ 371,240.00	\$ 375,000.00	\$ 369,545.27	\$ 354,545.27	95%	Includes pledges and outright cash gifts received YTD. Includes John Camp's gift of \$15,000 for the President's Lecture (Kolbert) not reflected in budget for FY19.	Current Board and Advisory Board	\$ 3,760.00	Current Board giving at same levels as last year + new board members giving each at least \$10k, as well as targeted additional asks
FY18 Annual Report	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 50.00	\$ 50.00	2%			\$ -	
FY18 Membership	\$ 87,000.00	\$ 73,435.00	\$ 80,000.00	\$ 78,145.00	\$ 78,145.00	98%	9% increase over last year	Current and new prospects	\$ 6,565.00	Collect names at events and tours and follow up with to invite to join, includes business memberships (not sponsorships)
FY18 President's Circle	\$ 80,000.00	\$ 60,156.38	\$ 70,000.00	\$ 72,800.00	\$ 72,800.00	104%	Net 5 new PC members	Board contacts; new prospects; renew current	\$ 9,843.62	Invite new potential members to PC events; recruit during year at other receptions and cultivation events
FY18 Unrestricted Grants	\$ 20,000.00	\$ 18,500.00	\$ 20,000.00	\$ 10,602.45	\$ 10,602.45	53%	2-3 new family foundations; Includes \$502.45 from the SAR endowment/Baebler Fund at SFCF, Newman's Own Foundation, Sydney Stern Memorial Trust, Bunting	New Prospects or lapsed donors (need to reestablish relationship)	\$ 1,500.00	Research prospects, make personal calls/ visits, write proposals, follow up
FY18 Business Sponsorships	\$ 25,000.00	\$ 19,250.00	\$ 20,000.00	\$ 38,115.67	\$ 24,233.08	121%	2-3 new business sponsors (\$1,000+); In-kind sponsors include: Santa Fe Dining for \$2,500; Inn on the Alameda for \$1,320; Ink & Images for \$483, Santa Fe Spirits for \$232. Does not include IARC event sponsors.	Businesses in Santa Fe and ABQ (include event sponsors)	\$ 750.00	Prepare business sponsor packets, compile list of top prospects, make personal calls to solicit gift; attend Chamber of Commerce events and offer After Hours Reception to recruit new members
TOTAL UNRESTRICTED	\$ 880,000.00	\$ 849,053.47	\$ 850,000.00	\$ 1,049,739.12	\$ 865,844.51	102%			\$ 946.53	

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CONTRIBUTED RESTRICTED FUNDS										
FY18 Restricted Grants: ARF	\$ 307,000.00	\$ 506,095.00	\$ 527,000.00	\$ 506,000.00	\$ 506,000.00	96%	\$246,000 for conservation and collections for FY19; \$260,000 for intellectual training for FY19		\$ 20,905.00	FY2019 grant proposal ideas to be submitted September 2017; to be reviewed by ARF representatives.
FY18 Restricted Grants: Margaret A. Cargill Foundation- Directed CEO	TBD	\$ 74,144.00	\$ -				Special grant for Campus Master Plan and MFB to attend CEO non-profit management training program		\$ (74,144.00)	
FY18 Restricted Grants: Paloheimo- Annual Report	TBD	\$ 35,600.00	\$ 35,600.00	\$ 35,600.00	\$ 35,600.00	100%	Committed- Year 3 of AR funding		\$ -	Submit request for FY18 in March 2017
FY18 Restricted Grants: Paloheimo- Enhanced Communications	TBD	\$ 50,423.00	\$ 75,198.00	\$ 75,198.00	\$ 75,198.00	100%	Verbal commitment for communications enhancements and PR counsel.			
FY18 Restricted Grants: Mill Foundation	\$ 30,000.00	\$ 30,000.00	\$ 30,000.00	\$ 30,000.00	\$ 30,000.00	100%	Need to request additional amount for Scholar Programs for FY19		\$ -	For Scholar Programs
FY18 Restricted Grants: Lannan Foundation	\$ 15,000.00	\$ 14,080.00	\$ 15,000.00	\$ 14,200.00	\$ 14,200.00	95%	Need to request additional amount for Scholar Programs for FY19		\$ 920.00	For Indigenous Writer-in-Residence
FY18 Restricted Grants: Frost Foundation	\$ 15,000.00	\$ 15,000.00	\$ 25,575.00	\$ 15,000.00	\$ 15,000.00	59%	For IARC education programs/ staff		\$ 10,575.00	Preliminary proposal for FY2018 submitted; pending invitation for full proposal October 1, 2017
FY18 Restricted Grants: NM Humanities Council	TBD	\$ -		\$ 5,500.00	\$ 5,500.00		To implement a new program in collaboration with NM MoA to highlight our shared history and to honor our anniversaries.			
FY18 Individual Restricted special projects	TBD	\$ 20,000.00	\$ 5,000.00	\$ 42,500.00	\$ 12,500.00	250%	\$7,500 from Betty and Luke Vortman Endowment Fund for public lecture series and IARC; \$5,000 from the Flora Crichton Endowment Fund; \$10,000 for the Bosavi Digital Archive Project		\$ (15,000.00)	Restricted- Specific according to project division
Cordell Prize	TBD	\$ -	\$ -						\$ -	
TOTAL RESTRICTED		\$ 745,342.00	\$ 713,373.00	\$ 723,998.00	\$ 693,998.00	97%			\$ (31,969.00)	
TOTAL CONTRIBUTED UNRESTRICTED + RESTRICTED		\$ 1,594,395.47	\$ 1,563,373.00	\$ 1,773,737.12	\$ 1,559,842.51	100%			\$ (31,022.47)	
CREATIVE THOUGHT FORUM-FY19 ESTIMATED COSTS- ADDITIONAL TO RAISE										
FY18 Creative Thought Forum	\$ 120,000.00		\$ 150,000.00	\$ 250,000.00	\$ -	0%	Grant from the Betty and Luke Vortman Endowment Fund at the ABQ Community Foundation to establish an endowment fund		\$ 150,000.00	Need to find donors/ investors to hire staff, implement programs



**DEVELOPMENT PLAN
FY 2018-2019
(7/18/18)**

	Goals
Goal 1	Build capacity for maximum fundraising success.
Goal 2	Increase revenue from annual fund and membership.
Goal 3	Strengthen major gifts and planned giving programs.
Goal 4	Determine readiness for a comprehensive campaign.
Goal 5	Heighten the profile and public awareness of SAR and its importance (work with Dir. of Public Programs and Communications)
Goal 6	Increase grant support from foundations and corporations (work with VP of Administration and Finance/ Grants Manager)

Goals, Objectives, and Strategies	
Goal 1	Build capacity for maximum fundraising success.
Objective	1.1 Work with current staff to optimize team performance.
Strategies	<ul style="list-style-type: none"> • Review annual goals for each team member to help accomplish overall department goals. • Work to maximize strengths of each staff member for the benefit of the team. • Continue to implement planning tools and systems to help team stay on track and on deadlines.
Objective	1.2 Increase the efficiency of RE database (RE NXT) and work to maximize its capabilities.
Strategies	<ul style="list-style-type: none"> • Work on training modules to develop our skills with RE NXT and its functionalities. • Implement best practices when utilizing RE NXT for donor relations management, annual fund appeals, and other fundraising strategies. • Continue to improve procedures for gift processing, database management, and clean up. • Focus on building infrastructure for RE wealth screen, including utilizing DonorSearch for more targeted prospect research.
Goal 2	Increase revenue from annual fund and membership.
Objective	2.1 Create and implement integrated plan for both mail and e-mail appeals for end of year as well as for spring campaigns to reach diverse constituencies and increase numbers of donors as well as amount of donations (8.5% increase).
Strategies	<ul style="list-style-type: none"> • Develop print materials for mailings including fundraising letters, reply forms and brochures utilizing new messaging strategies to communicate the importance of SAR. • Design effective e-mail campaigns to increase on-line giving. • Create brief videos to enhance the “storytelling” aspect of SAR and the impact of SAR on scholars, artists, and members. • Adapt website to reflect new annual giving campaign. • Review levels of giving and giving opportunities. • Coordinate annual giving campaign with membership drive(s). • Segment constituencies and target appeals according to interests and relationships to SAR. • Generate targeted mailing lists customized to each identified constituent. • Develop and implement ideas to increase alumni engagement and giving. • Create new strategies to increase monthly giving. • Respond to changes in new tax laws to encourage alternative ways of giving.

Objective	2.2 Expand alumni giving program by 30%.
Strategies	<ul style="list-style-type: none"> • Enlist help from Dir. of Scholar Programs and IARC to work on strategies to engage alumni in supporting SAR. • Involve scholars/artists while they are at SAR to consider ways of supporting SAR. • Clean up database and update contact information and accomplishments of alumni. • Communicate with alumni on a more regular basis with targeted messaging. • Determine benefits for alumni giving and ways to keep alumni engaged in SAR activities. • Create area on website and/or use social media channels to report alumni successes and achievements. • Form alumni leadership group to help with planning alumni engagement and strategies to keep alumni involved with SAR.
Objective	2.3 Improve offerings for members including lectures, field trips, classes, campus tours, etc.
Strategies	<ul style="list-style-type: none"> • Work in coordination with Dir. of Public Programs and Communication to support the implementation of lecture and class promotion and registration of members. • Continue to work on field trip improvements- with a variety of offerings and pricing structures. • Work as liaison to trip operators by coordinating planning, marketing, and logistics for member field trips. • Refine training materials and strategies for campus tours. • Help to promote and recruit members to participate in Scholar Salons as a component of the Public Lecture series to give members (\$500+) an opportunity to participate in more in-depth conversations and experiences with SAR scholars and artists.
Objective	2.4 Improve recruitment strategies and attract new members, increase by 11%.
Strategies	<ul style="list-style-type: none"> • Maintain lists and attendance records of those who attend SAR events and tours. • Send follow up correspondence to attendees to thank current members and to invite non-members to join. • Add names of prospects from staff and Board to database as appropriate. • Develop and implement strategies to recruit new members, including open houses and presentations to targeted interest groups. • Use peer to peer strategies to encourage new and prospective members to take tours of the SAR campus and IARC collections. • Start "ambassador" program to broaden circle of supporters. • Update membership collateral in conjunction with Dir. of Public Programs and Communication.

	<ul style="list-style-type: none"> • Develop new recruiting and referral strategies. • Promote membership at all SAR events and programs. • Work with SAR staff, volunteers, and existing members to be ambassadors and help expand our networks.
Objective	2.5 Improve retention strategies of existing members.
Strategies	<ul style="list-style-type: none"> • Start a loyalty program for members. • Continue to survey members to meet their needs and interests. • Revisit the benefits offered at different member levels to see what changes can be made to accommodate both in-town and out-of-town members.
Objective	2.6 Increase level of support from business sponsors to support public programs and sponsor events.
Strategies	<ul style="list-style-type: none"> • Consult and work with the Development Committee/ Board of Directors to help identify top prospects for sponsorships and solicit new business sponsors. • Provide solicitors with appropriate materials and training to request sponsorships. • Record activities of the solicitors in RE so that activities can be tracked and managed. • Review with VP of Finance and Administration list of vendors. Approach vendor representatives as individual prospects. • Be more active in the SF Chamber of Commerce events to meet and recruit new business sponsors. • Host Business After Hours event in spring 2019 to attract new business sponsors.
Objective	2.7 Expand annual giving through fundraising events.
Strategies	<ul style="list-style-type: none"> • Plan and implement event in conjunction with "Voices of the Rainforest" premiere at the Violet Crown with Steve Feld and Mickey Hart (tbd). • Plan and implement 4th Collections of Distinction event for July 2019 (this also serves as a cultivation event for major gifts).
Goal 3	Strengthen major gifts program and planned giving program.
Objective	3.1 Identify top prospects and develop individualized strategies to cultivate and solicit major gifts (\$2,500+).
Strategies	<ul style="list-style-type: none"> • Work with President, Board Chair, and Development Committee to identify and solicit new and current prospects, including 5 new President's Circle members. • Solicit support for Founders' Society to support Creative Thought Forum, 5 new donors @ \$5,000 ea.; encourage multi-year giving going forward. • Review lists and make assignments for solicitations, involving both staff and board members.

	<ul style="list-style-type: none"> • Research prospects to determine projected levels of giving and prepare background information for solicitors. • Conduct training as needed for solicitors. • Conduct the asks and report back on results to Director of Development. • Record results and next steps in RE database- track “moves management” • Solicit gifts in one on one solicitations, including donations from cultivation events.
Objective	3.2 Continue to increase membership in El Delirio Legacy Circle.
Strategies	<ul style="list-style-type: none"> • Review El Delirio program and review list of current members. • Develop and implement ideas to enlist new participants in the program, starting with board and former board members. Consider volunteers, docents, retirees as well as current donors. • Review current print materials and develop new materials as needed. • Make sure that all current members of El Delirio are invited to all President’s Circle events. • Enlist at least 10 strong prospects and 2-3 new members. • Provide a variety of options for donors to include SAR in their estate plans, including bequests, life income gifts, life insurance, and IRA distributions.
Objective	3.3 Plan events to help steward current major donors and cultivate new major gift and board prospects.
Strategies	<ul style="list-style-type: none"> • Work with Chair of President’s Circle, Board Chair, and other interested Board members to plan and implement compelling and intimate events that engage major donors and entice new donors to give at leadership levels, including joining the newly formed Founders’ Society for the Creative Thought Forum. • Offer exclusive invitations for major donors to intimate events at SAR and at private homes that give prospects and donors an “insiders” view and special access to scholars and Native American artists. • Enlist Board and current donors to invite prospects to join them at those exclusive events and to give at leadership levels. • Follow up on events to assure for maximum opportunities for prospects to give at leadership levels and for current donors to increase their levels of support. • Continue to work with Director of IARC and Scholar Programs to identify individual [and/or business] prospects and work on strategies for cultivation and stewardship. • Plan and implement annual Collections of Distinction event for July 2019.
Objective	3.4 Continue to involve Board in major and planned giving/ legacy program.
Strategies	<ul style="list-style-type: none"> • Conduct Board solicitation as part of major gift program, including planned giving. Obtain board commitments for following year budget by December 2018 to be received by 6/30/19.

	<ul style="list-style-type: none">• Invite select Board members to make additional targeted gifts over and above their basic annual gift and join the Founders’ Society to provide additional support for the Creative Thought Forum initiative.• Involve Board in planned giving program by inviting their participation as well as their inviting friends and colleagues to events and providing pertinent information for prospects to consider.• Invite Board to continue to provide names of prospects to approach for major gifts.• Involve Board members as ambassadors when asking prospects for a gift.• Communicate regularly with former board members and invite their participation and continued/resumed giving.
Objective	3.5 Work with Board Nominating Committee to identify new Board prospects.
Strategies	<ul style="list-style-type: none">• Make lists of potential new Board members based on a set of established criteria.• Work with Governance Committee to conduct Board asset mapping to determine strengths of current Board members and to help identify needs of the organization and the Board.• Cultivate Board prospects as major gift donors and involve them in SAR related activities.• Prepare orientation for new Board members with a focus on the importance of fundraising as one of their primary areas of responsibility.
Goal 4	Determine readiness for a comprehensive campaign.
Objective	4.1 Conduct a pre-campaign readiness assessment for implementation of the campus master plan.
Strategies	<ul style="list-style-type: none">• Contract with Capital Campaign Masters (or other firm) as coaches.• Assemble a core committee (working group of 6 members) to work with Campaign consultants to develop a timeline and strategies for campaign readiness.• Clarify goals for the campaign that relate to elements of the campus master plan and for all programmatic and endowment needs.• Create a realistic gift pyramid that reflects gifts needed at different levels and possible naming opportunities.• Draft a preliminary case for support (see below).• Starting with our board, create a list of potential 20-30 lead donors.• Engage potential lead donors in visioning conversations about the project to get them on board.• Issue an RFP for campaign consultants to conduct a feasibility study, if we feel we are ready to move forward.• Interview possible firms.• Conduct board retreat to get ready for a campaign (August).

Objective	4.2 Develop a draft case for support for the comprehensive campaign.
	<ul style="list-style-type: none"> • Utilize the recommendations and guidance of 66&Co. to establish the main messaging and language for the case. • Identify tangible results and impact of SAR to use as case studies. • Work with a contract writer, as well as Dir. of Public Programs and Communications, and graphic designer to develop the language and look for the case for support. • Integrate efforts across departments, so all staff are involved in developing the case for support and helping people understand the goals of the campaign.
Goal 5	Heighten the profile and public awareness of SAR and its importance. (work with Dir. of Public Programs and Communications)
Objective	5.1 Communicate the importance of SAR to current and prospective donors/ members.
Strategies	<ul style="list-style-type: none"> • Work with 66&Co. to improve our messaging to reach new and existing audiences. • Segment and customize communications to suit the diverse audiences of SAR, including scholars, artists, donors, and adult learners. • Develop strategic partnerships that broaden our circle of supporters. • Continue to attract donors through promotion and involvement in the Creative Thought Forum. • Work with IARC and Program staff on ideas for open houses, including presentations/ receptions on campus, artist demonstrations, tours, etc. focused on various audiences (local community, business community, Native American communities, etc.). • Integrate donor related stories into SAR NOW and the monthly e-news how they relate to SAR programs.
Objective	5.2 Continue to offer high quality programs for the general public to attract new audiences/ donors/ members to SAR.
Strategies	<ul style="list-style-type: none"> • Help execute events in coordination with Dir. of Public Programs and Communication, involving planning, registration, set up, and clean up. • Follow up with event attendees to invite them to become members and get involved with SAR activities.
Objective	5.3 Better understand audience(s) and impact of SAR.
Strategies	<ul style="list-style-type: none"> • Conduct survey of members/constituents in database to determine their level of interest in SAR and the types of programs they enjoy as well as communications and content they appreciate receiving. • Collect data at SAR events/ tours when possible to capture demographic information.

	<ul style="list-style-type: none"> • Continue to collect anecdotal information on SAR alumni and work on documenting the impact SAR has had on their careers and communities. • Use information collected to inform our decision-making about programs going forward.
Objective	5.4 Maximize use of website for more effective communications and online fundraising.
Strategies	<ul style="list-style-type: none"> • Utilize new website for enhanced communications and fundraising effectiveness. • Utilize best practices when adding content to the web to make sure it is communicating our mission and messaging and is addressing the needs of our donors/members. • Assure that online giving and signing up for e-news is easy and accessible. • Consider calls to action on the website to involve our constituents. • Work with Dir. of Public Programs and Communication to keep content fresh and engaging.
Goal 6	Increase grant support from foundations and corporations.
Objectives	6.1 Assess current grant procedures and establish a new Grants Management System with management tools (2 Excel spreadsheets: 1 for active grants and 1 for planning & monitoring new & renewal grant submissions for the fiscal year) by May 16, 2018.
	6.2 Identify and connect with ten new funders and develop and submit two proposals by June 30, 2019, with an emphasis on securing unrestricted funding.
	6.2 Determine the most appropriate and cost-effective grant searching tool by evaluating our current Foundation Source and Grant Station databases and comparing them with the free Foundation Center Database at the Santa Fe Community Foundation by December 3, 2018.
	6.4 Assist the VPFA with developing and submitting a Federal government Indirect Cost Rate proposal by November 1, 2018.