

School for Advanced Research  
Development Committee Annual Report – 2015 (Revised)

The members of the board development committee for 2014-2015 were Elizabeth Roghair, Chair, Dorothy Bracey, Susan Foote, Michael Brown, Angela Gonzales, Tim Evans, Carl Trinca and Wes Cowan. Lorraine Cleveland has provided fine staff support to the committee.

At the start of the 2016 fiscal year, we expected to be working with a new Vice President for Development, working together to create and begin to implement a comprehensive development plan for SAR. This expectation did not turn into reality, and the Vice President left SAR in February 2015. Several months later an interim director was appointed. A search process for a Director of Development was launched in May, and candidates have been interviewed.

To generate momentum and provide continuity of leadership the committee met monthly throughout the year, first with just its local members and later with out-of-town members calling in. Board members took on tasks such as creating collateral for the 2015 spring appeal, arranging and hosting events, thanking donors, developing new relationships, and taking part in cultivation and stewardship events for the President's Council and El Delirio Legacy Circle members.

#### Fundraising results

Fundraising results on the Summary Financial Data report for the year ended June 30 were \$2.78 million, down \$1.24 million from the prior year's \$4.02 million. The FY14 "restricted gifts for future operations received or committed" amounts include \$1.3 million in funds that are committed but not guaranteed. Management chose to exclude such amounts in the FY15 report because their receipt is not assured. Excluding this amount, FY15 results are up \$65 thousand over FY14.

Gifts for operational support from board members totaled \$548 thousand of which \$228 thousand was received and \$320 thousand pledged. In addition, \$94 thousand for unrestricted support was received from non-board members and \$3,100 for campus maintenance. Restricted gifts totaled \$725 thousand, the majority of which was from the Anne Ray Charitable Trusts for the Howell property, IARC intern program and conservation/consultant program.

An all-out effort during June 2015 motivated by a challenge grant from Eric Dobkin resulted in enough funds being raised to support the FY 2016 budget.

#### Highlights of committee efforts:

*President's Council Membership* has been boosted considerably through the exceptional efforts of Susan Foote, who recruited at least five new members. Two successful PC events were held – a Fireside Chat in December and a Gardenside Chat in June. El Delirio members were invited to both events. PC president Ken Stilwell continues to lead the council with enthusiasm and energy.

*Introducing residents of Las Campanas to SAR:* Carl Trinca arranged several lectures, receptions and a dinner at which many Las Campanas residents learned about SAR. Special campus tours were also offered to Las Campanas residents, and some have become members.

*Spring appeal:* Dorothy Bracey and Susan Foote put together a very successful appeal letter asking for gifts to meet the needs of SAR's historic campus. Results exceeded those of the year-end appeal; some new donors were recruited and we learned that we have a constituency that will help us sustain our remarkable property.

*Membership and Presidential lectures:* With the energetic and thoughtful work of Lorraine Cleveland, events have been arranged around lectures to attract and cultivate donors – dinners, book signings etc. We now have a platform for ticketing major lectures as a result of the Nick Bostrom presidential lecture in June.

*SAR presence at the Whitehawk Antiques Show* before the 2015 Indian Market: Wes Cowan arranged to offer show participants private tours of the SAR vault and for a table at the show; IARC Brian Vallo has made the arrangements. This will introduce a new audience to SAR.

*Cultivation of relationships with former scholars:* Angela Gonzales has connected with many former Lemon scholars, offering them updates on SAR and preparing them for an invitation to contribute.

*The Santa Fe Garden Club* was invited to meet on campus and visit SAR's gardens and is preparing a plan to refurbish the President's Garden. Carl Trinca was instrumental in developing this relationship.

*Launching the Linda Cordell Book Prize:* Elizabeth Roghair and Tim Evans assisted in developing documentation for use in recording pledges to the endowment fund that will sustain this bi-annual gift over the long term.

*A Hispanic Scholar Fellowship proposal* invited by the Mellon Foundation is in the last stages of review; Michael Brown's relationship with Foundation staff was instrumental in attracting this invitation.

*Field trips*, a mainstay of the membership program and a pipeline for upgrading members and cultivating future board members, have been put on hold after the retirement of manager Janie Miller; this function is likely to be outsourced.

*Volunteer public relations services* were arranged with Kelly Koepke, a talented writer who was identified by a business colleague of Elizabeth Roghair.

*Retired anthropologists* living in Santa Fe are becoming better connected to SAR through the efforts of Michael Brown and Dick Ford (the "Ford 100"). Michael's paper making the case for supporting the anthropology profession will be published in *Anthropology Today* in the fall.

#### Summary:

Looking forward, with the hiring of a Director of Development, the committee should be able to focus more on policy and strategy. Carl Trinca, whose outreach efforts have been so very fruitful, will be taking on the chairmanship. The committee wishes to express its appreciation to the other board members who have stepped p to assist through personal gifts, hosting and sponsoring events, and introducing new members.

Elizabeth B. Roghair, Chair

August 6, 2015