

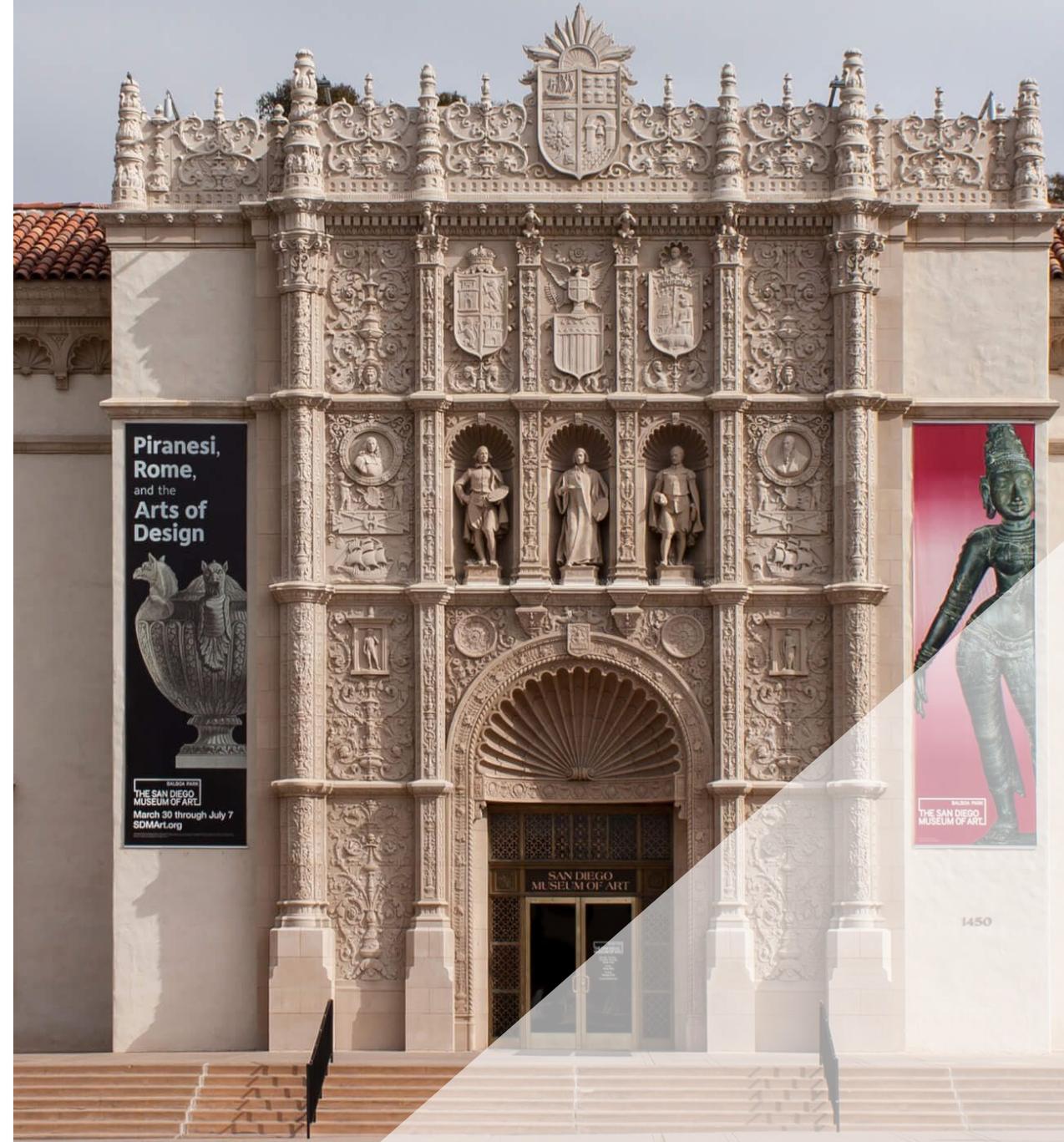


BALBOA PARK
THE SAN DIEGO
MUSEUM OF ART

How do you know you're ready for a campaign?

Where do you start?

March 2024



TODAY'S PRESENTERS



**AASHIKA
PATEL**

Managing Director
CCS Fundraising



**LAUREN
EKMEKJIAN**

Senior Vice President
CCS Fundraising



**STACEY
LOOMIS**

Director of Development
& Membership
San Diego Museum of Art

ABOUT CCS



CCS Fundraising, founded in 1947, is a strategic consulting firm that partners with nonprofits for transformational change. Experts in campaign and development strategy, CCS plans and implements fundraising initiatives that help organizations make a bigger impact—locally, nationally, and globally.

75+ Years

Celebrating 75 years in 2022, we are the most widely recommended firm in the field.

Local Perspective

We have a long history of working with many of the leading non-profit organizations throughout the Pacific Northwest and across the U.S. We have worked to create campaign strategies and development plans to support billions in fundraising goals.

700 Partnerships Annually

We have worked closely with nearly 40% of the 100 best performing charities, across 44 states, and within 350+ cities.

Campaign Expertise

In 2022, CCS helped to plan and manage over 300 capital, endowment, and comprehensive campaigns while directly managing more than \$15 billion in cumulative goals each year.

Deep Experience

CCS has unparalleled experience working with nonprofit organizations to help plan and lead significant fundraising initiatives. We understand how fundraising differs across communities and constituencies.

90% Repeat or Referrals

Ninety percent of our business comes from repeat business or referrals.

500+ Professional Staff

Our accomplished, highly-motivated staff embody results-driven success, collaborative partnership, and an entrepreneurial growth mindset.

ABOUT SAN DIEGO MUSEUM OF ART

1926

Established

450,000+

Visitors annually

32,000+

Objects in permanent collection

460+

Volunteers (not including docents)



BALBOA PARK
THE SAN DIEGO MUSEUM OF ART

AGENDA

01

ELEMENTS OF A
SUCCESSFUL
CAMPAIGN

02

PRE-CAMPAIGN
ACTIVITIES

03

THE SAN DIEGO
MUSEUM OF ART
STORY

04

DISCUSSION +
Q&A



FUNDRAISING

AUDIENCE POLL QUESTION

Is your organization currently conducting a campaign effort?

- A. Yes, we are launching or in the middle of a campaign
- B. No, but we are considering a campaign
- C. No



01 ELEMENTS OF A SUCCESSFUL CAMPAIGN

TYPES OF CAMPAIGNS

COMPREHENSIVE

- Counts all gifts and pledges
- Inspirational case to expand and maintain mission
- Broad
- Seek one, best, multi-year commitment from each donor that includes annual giving
- Longer (3 - 5 years or more)
- Donors typically solicited one time

STANDALONE

- Counts only capital (as an example) pledges
- Extraordinary one-time investment in a capital project or program
- Targeted
- Seeks multi-year campaign commitments above and beyond annual giving
- Faster (18 months - 2.5 years)

ARC OF A SUCCESSFUL CAMPAIGN



The study and campaign planning stages consist of several key activities:



Draft and test a suite of materials and messaging that excites and draws in a philanthropic audience.



Screen and segment the donor base to prioritize activity and identify new prospects.



Instill ownership and knowledge in a cadre of donors and leaders who will likely provide the bedrock support to launch the campaign.

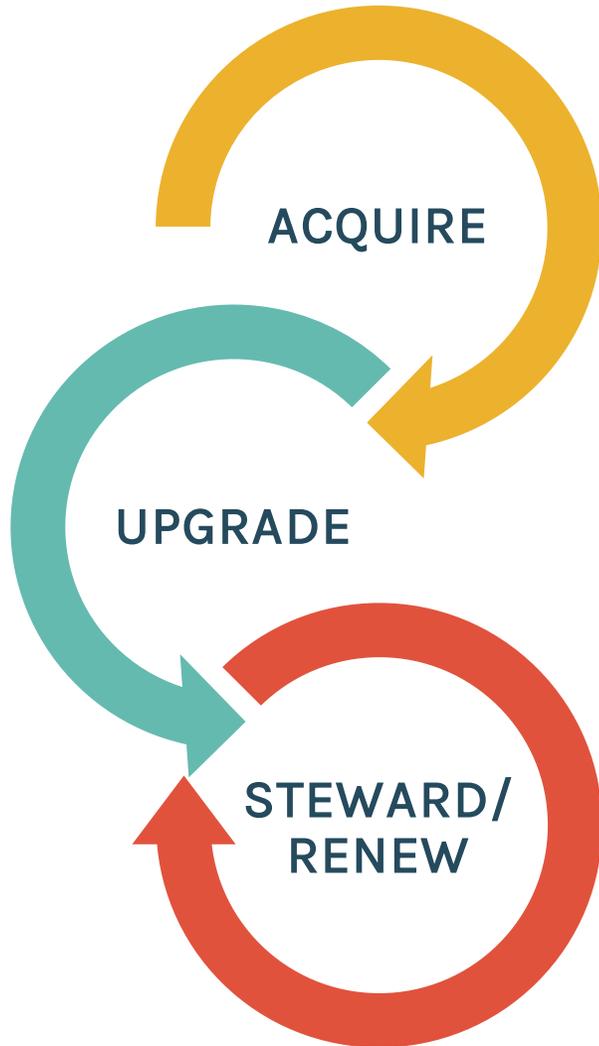
BALANCED FUNDRAISING MODEL

A balanced philanthropy program and prospect pipeline should meet the fundraising needs of your organization. **10% - 30% of secured funds should come from renewable gifts, or the Annual Fund. 70% - 90% should come from deferred and major gifts.**

Where appropriate, donors should be moved up the pyramid throughout their relationship with your organization to deepen their engagement and increase their giving.



FUNDRAISING OBJECTIVES



- Bring new donors to your donor base or re-acquire lapsed donors
- Generally more expensive than renewal or upgrading

- Secure gifts from existing donors
- Helps to stabilize your donor base

- Increase gift amounts from existing donors
- Moves donors through the donor lifecycle



02 PRE-CAMPAIGN ACTIVITIES

CAMPAIGN PILLARS

Planning for a successful campaign effort requires careful preparation of the following key elements



CASE

1. Communicate a donor-centric Case for Support anchored by strategic fundraising priorities
2. Position fundraising as a targeted investment opportunity



LEADERS

1. Deepen Board engagement and involvement in fundraising
2. Identify member leaders to be fundraising ambassadors



PROSPECTS

1. Identify prospects with philanthropic capacity and alignment to case priorities
2. Leverage established connections to develop engagement strategies



PLAN

1. Create and implement a timeline with activity benchmarks
2. Develop policies and procedures



ELEMENTS OF A COMPELLING CASE

WHO

Are you?

WHAT

Do you do in your
community?

HOW

Do you create positive
change?

WHY

Do you need support?

HOW

Much do you need?

WHEN

do you need it?

ROLE OF A VOLUNTEER LEADER



ADVOCATE

Respected community leader
and strong communicator



DONOR

A generous stakeholder who
is personally philanthropic



PARTNER

Collaborative and passionate
about the mission



CONNECTOR

Has access and is willing to
make introductions to
potential supporters



RESOURCE

Has an inspiring personal
story

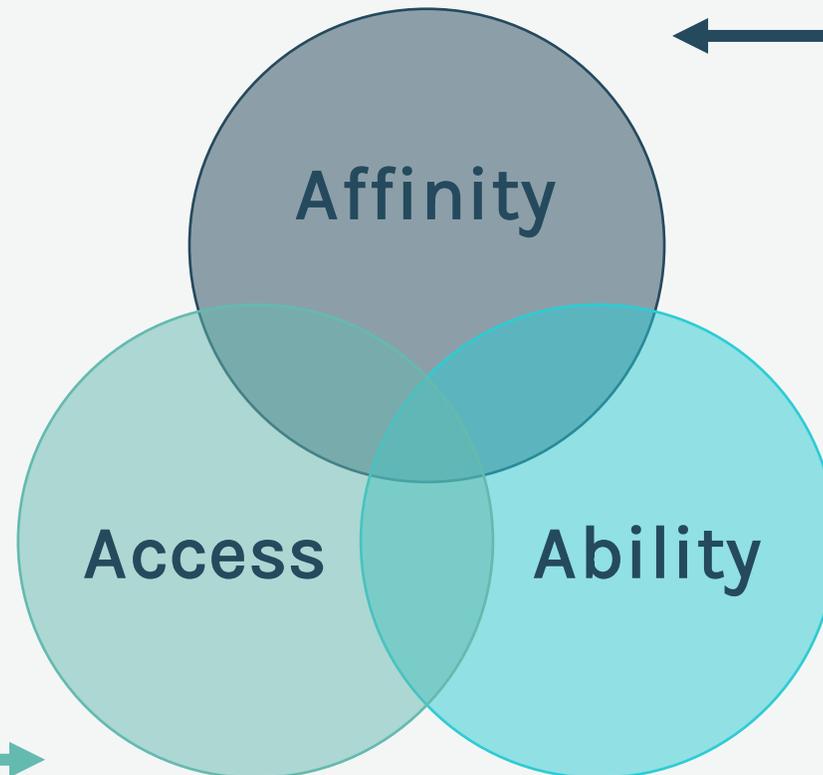


STEWARD

Can commit time to
maintaining relationships

GUIDING PRINCIPLES FOR PROSPECTING

Prospecting is the process of identifying potential new donors



- Does the prospect have an existing relationship with your organization or leadership?

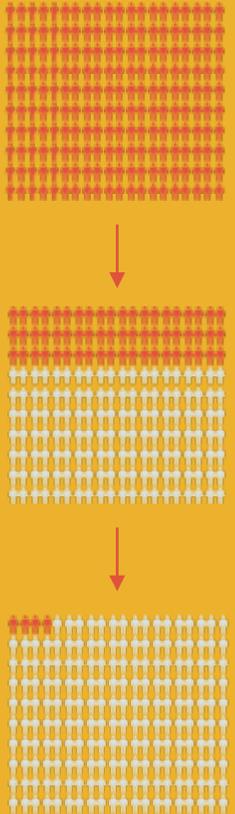
- Is the prospect aligned with your organization?
- Does the prospect support similar organizations or causes?

- Does the prospect have assets to consider a gift of this size?
- Has the prospect made gifts of similar size before?

TOOLS FOR IDENTIFYING MG PROSPECTS

Wealth screening, predictive modeling and RFM analysis can help identify your best prospects

PREDICTIVE MODELING
Forecasts future giving behavior

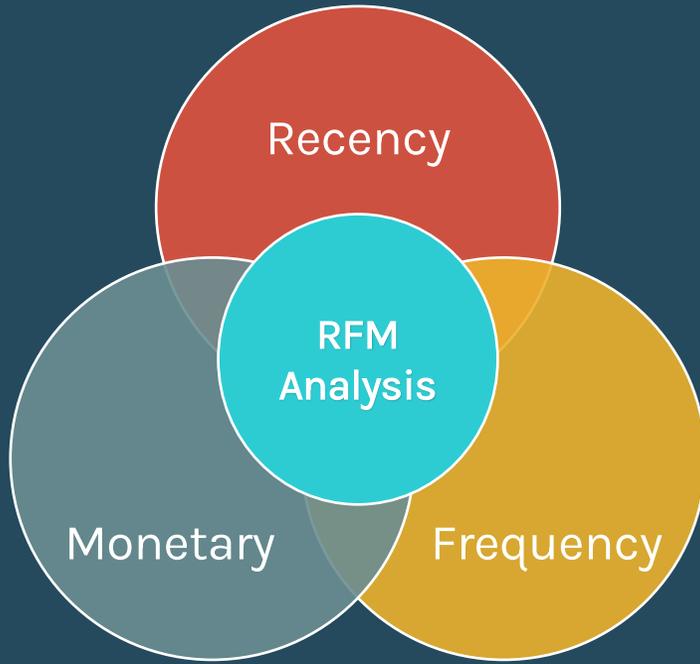


Full donor database:
10,000 constituents

Apply multiple filters:
4,000 constituents

Add additional criteria:
250 constituents

RFM ANALYSIS
Segment donors based on giving



Recency

Monetary

Frequency

RFM Analysis

SAMPLE TIMELINE AND ACTIVITY TRACKER

Donor Strategy Builder

	Discovery	Cultivate	Brief	Ask
Action to be taken				
The meeting setup				
Who will be involved				
Materials to be developed				
Follow-up plan				
Completion date				

- Create a plan**
- Personal goal
 - Portfolio of prospects
 - Available time
- Set goals and benchmarks**
- Activity goals
 - Measurable and quantifiable
 - Financial goals
 - Need and potential
 - Table of gifts
- Determine timing and pace of activity**
- Prospect readiness
 - Solicitation dates
- Regularly analyze progress and results – and adjust!**

CAMPAIGN READINESS GUIDING QUESTIONS

You should be able to answer these questions prior to starting a campaign.

- 

1 GOAL & TIMING

What is the right goal for the campaign? How should the campaign be phased?
- 

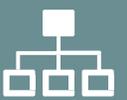
2 CASE

What core messages and priorities will inspire existing and new supporters?
- 

3 LEADERSHIP

How can your organization leverage current, and gain new, volunteer leadership to champion the case?
- 

4 PROSPECTS

How robust is the pipeline of potential supporters? What is the profile of a top prospect?
- 

5 INFRASTRUCTURE

What resources and support will the organization need to accelerate its fundraising activity in a campaign setting?

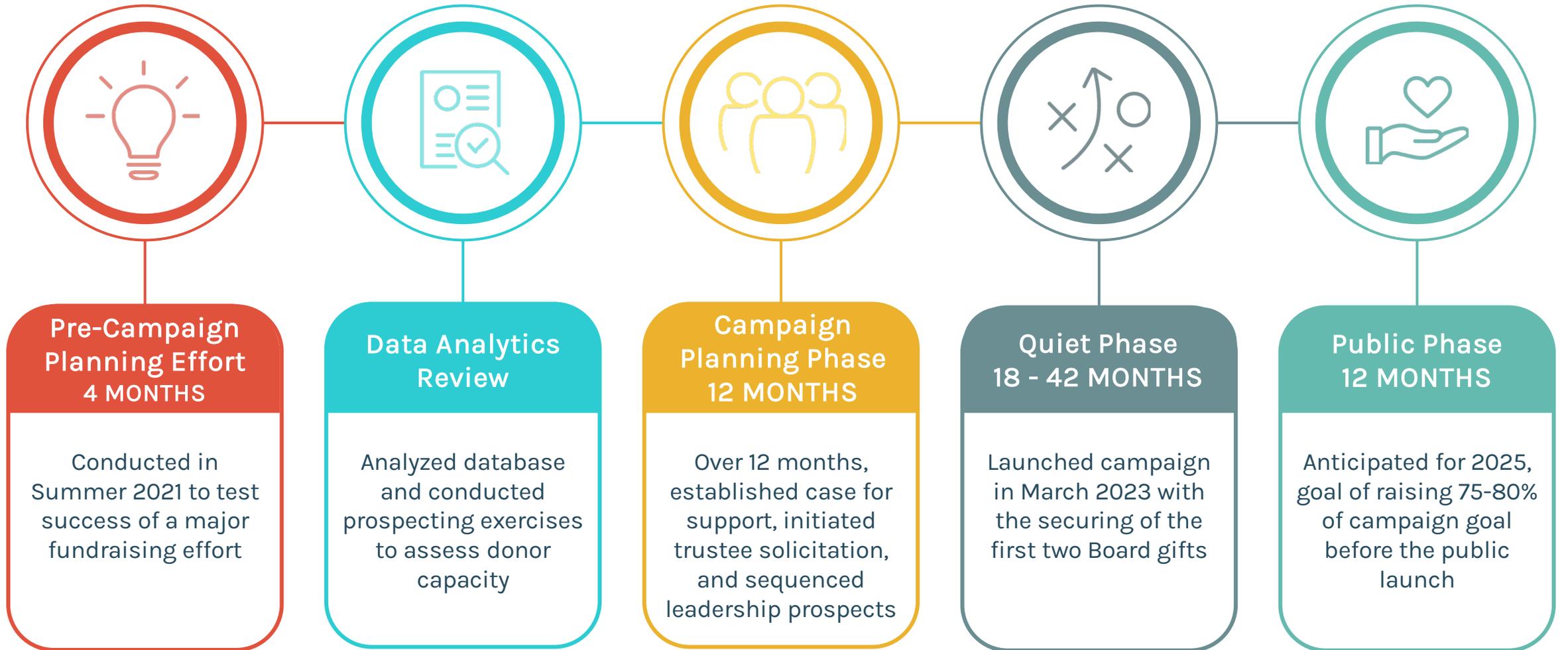


03 THE SAN DIEGO MUSEUM OF ART STORY

MORE THAN TEN YEARS IN THE MAKING



SDMA CAMPAIGN TIMELINE



BUILDING A COMPELLING CASE



Our vision is to inspire, educate, and cultivate curiosity for the next century.

Now is the time to make a transformational investment in the Museum's facilities to ensure that we can continue to:

- Serve a diverse and growing community
- Care for our collection
- Build modern technological and environmental infrastructure
- Ensure a stronger financial future for the Museum

This campaign makes the beginning of a new era to inspire, educate, and cultivate curiosity for the next 100 years.



A \$100 - \$150 Million campaign will include four investment areas:

Design a new pavilion, rooftop terrace and sculpture garden

Build a new home for the Arts Education Program

Provide for the Museum's collection and programs

Fortify the Museum's endowment

INSPIRING LEADERSHIP



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THE SAN DIEGO
MUSEUM OF ART



PREDICTIVE MODELING



Collect & process data

Vet and process data files containing constituent records.



Predictive modeling

Develop 2 customized predictive models, scoring constituents on a scale of 1-100 using demographic, giving, and interaction-based data.



Wealth assessment

Screen top households for estimated wealth and giving capacity.



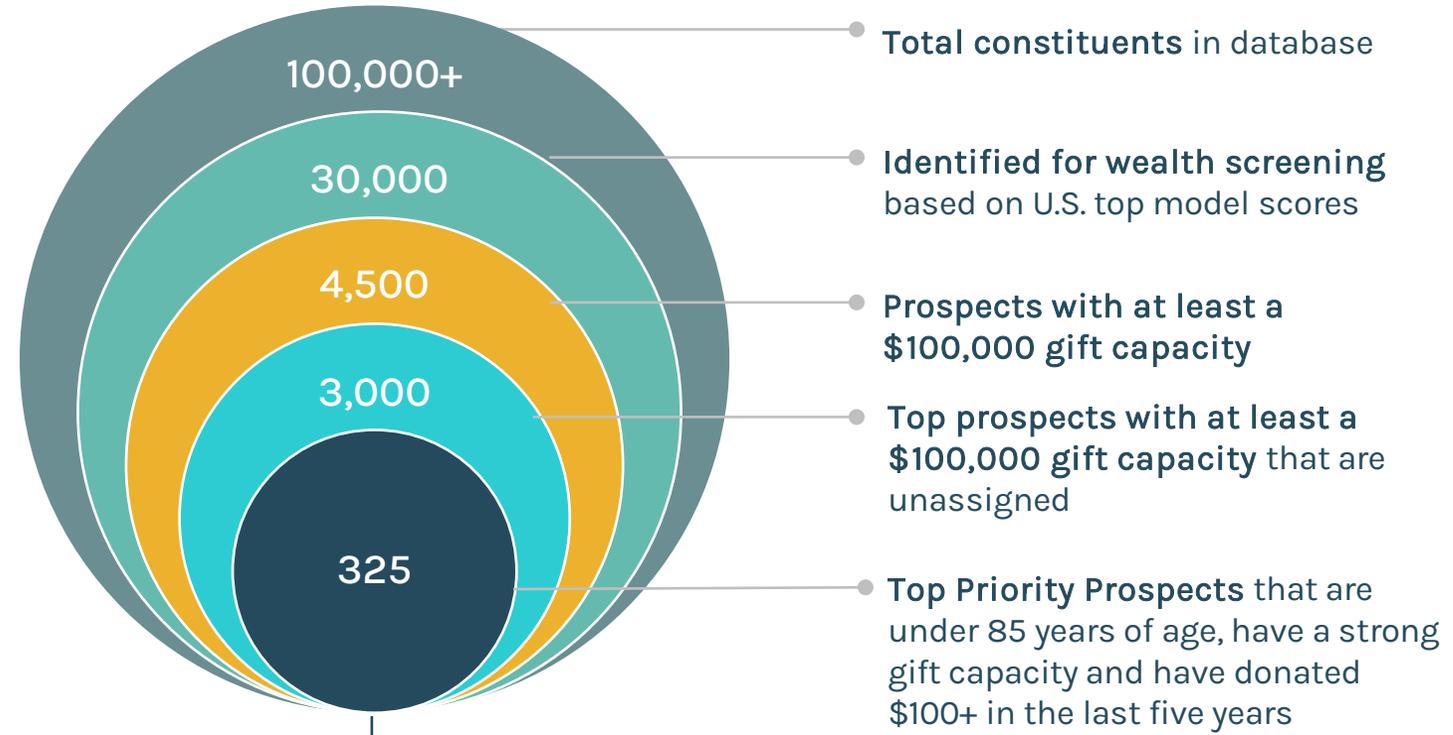
Assess results

Explore the results to identify, segment, and prioritize current and new households.



Segment and prioritize top households.

PROSPECT PRIORITIZATION



Tier 1

75

- Have a gift capacity of \$200K+ and have given at least \$100 in the last five years

Tier 2

250

- Have a gift capacity of \$100K-\$200K and have given at least \$100 in the last five years

**Numbers are representative and not actual*

FACILITY TOURS AS CULTIVATION TOOL



Facility tours provided an opportunity to share more deeply about the museum's needs while getting prospective donors excited about the prospect of supporting the campaign.

LEVERAGING PIVOTAL MOMENTS IN EARLY PROJECT TIMELINE



Pre-Announcement Communications



Announcement of Project Architect



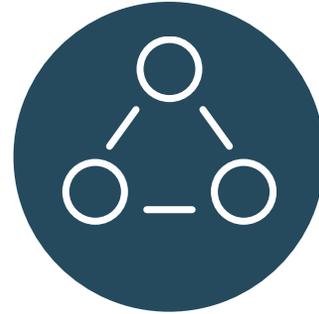
Architectural Design and Planning Process

PLANNING FOR UNIQUE CHALLENGES



SETTING A NEW PRECEDENT

Consider how a bold vision can encourage innovation and expand what is possible for your organization and community



ENGAGING A DIVERSE ARRAY OF STAKEHOLDERS

Consider the various needs and priorities of stakeholders

Carefully evaluate how and when to best share information with key constituents

Communicate transparently and openly



ADAPTING TO A CHANGING LANDSCAPE

Stay nimble in response to unanticipated changes

Adapt plans and find a path to keep momentum and continue moving forward



04 AUDIENCE DISCUSSION + Q&A

THANK YOU

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