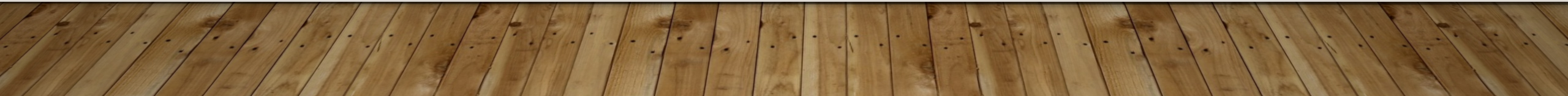


PLANNING LONG-TERM IN THE NON-PROFIT

BEYOND MISSION AND VISION



OVERVIEW

1. Building your “Team”
2. Building your network of stakeholders
3. Fundraising vs Capitalization

This is a conversation, so feel free to raise your hand and ask questions. You, may also put questions in the chat.

BUILDING YOUR TEAM

- Choose people with right expertise.
- From Good to Great
 - Getting the right people on the bus
 - Retain the right people *before* embarking on any specific program.
 - Complements and not equals:
 - Management should include people who care deeply about the company and will argue passionately for the decisions they believe are right.
- Assess and know the leadership styles within your management team.
 - Directors, Analyzers, Expressers, Harmonizers
- Equity, Diversity and Inclusion
 - How do you plan to make this part of your culture?

LEADERSHIP STYLES

- **Directors**
 - Goal oriented, make decisions quickly,, always on the go, tells it as it is.
 - Could be perceived as insensitive.
- **Analyzers (also called Thinkers)**
 - Data driven, task oriented, makes lists, process driven.
 - Could be perceived as procrastinator
- **Expressers**
 - People oriented, animated, entertaining, thinks out loud,
 - May be imprecise.
- **Harmonizers**
 - Relationship builders, sensitive to others, dedicated, loyal, avoid conflicts,
 - May overcommit.

BUILDING YOUR NETWORK OF STAKEHOLDERS

- Speak from purpose and passion.
- Everyone is a possible stakeholder.
- Have a strategy for first-time meetings with prospects.
 - Identify connectors within your network: Board, staff, stakeholders.
- Investing is personal: Identify personal connections with the prospect.
- The power of grassroots organizing:
 - Social media
 - Volunteers

FUNDRAISING VS CAPITALIZATION

- Two unique strategies for short-term and long-term sustainability.
- Importance of a two-pronged approach to sustainability.
- Both are important parts of your institutional relationship building process.

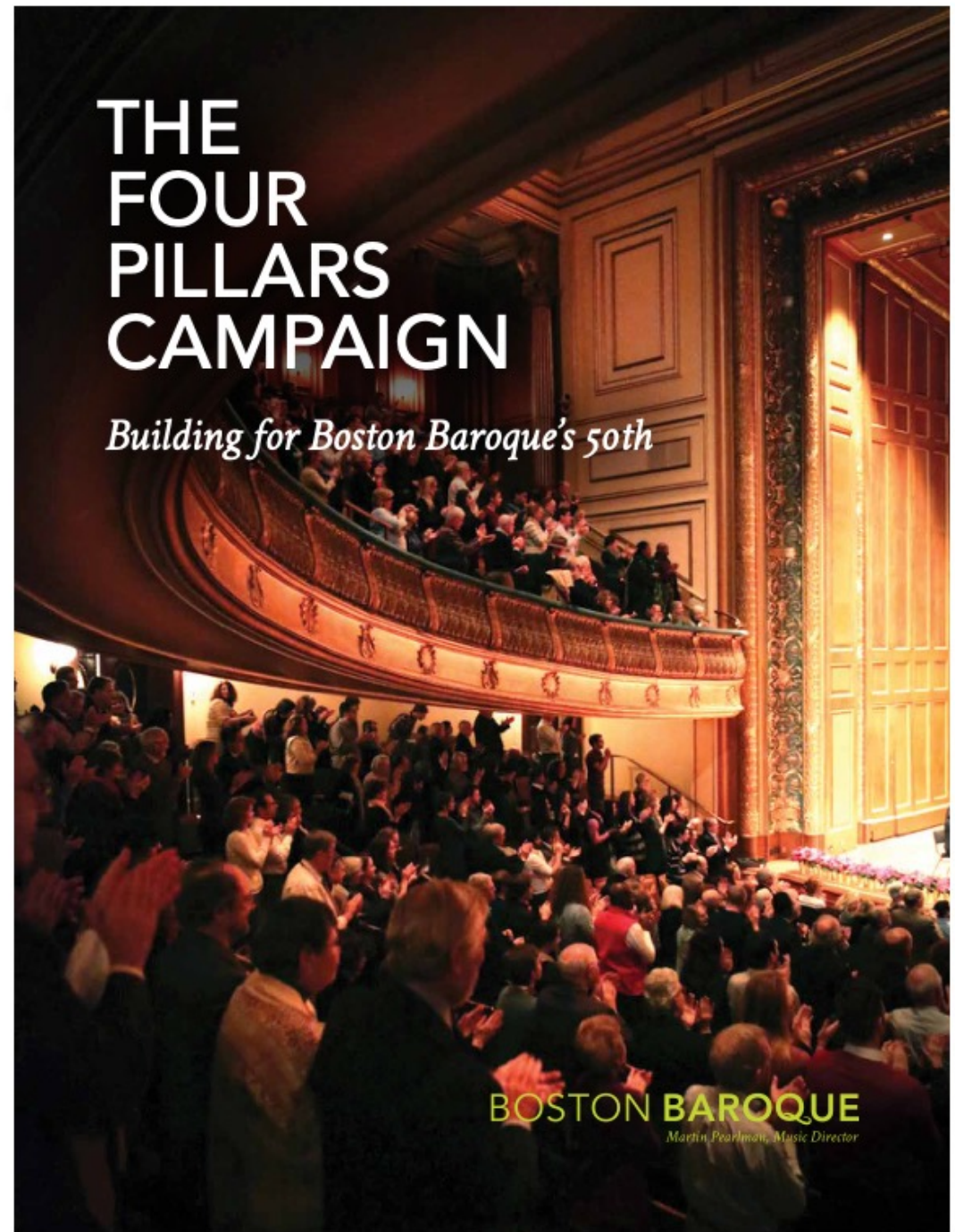
TRADITIONAL FUNDRAISING

- **Less Certain**
- FY to FY Traditional Strategies
 - Individual giving campaigns: Include direct mail, electronic solicitations, phone banks, etc.
 - Major Gifts - is personal: Can take years to develop, but greater yield!
 - Foundation and Corporations: Vary from region to region
 - Special Events and Affinity Groups: Opportunities for social networking, can be fun for the donor. Awareness of the many special events that happen every year. Opportunities to steward people into higher levels of participation.
- Can be transactional and/or one-time.
- Could be short-term relationships
- Require staff and continuous human and technical resources.

CAPITALIZATION CAMPAIGNS

- **More Certain**
- Not the same as Capital Campaign!
- Long-term in style, more institutional.
- Promote stabilization.
- They often are contracted commitments.
- Offers resources for innovation opportunities within your institution.
- Engages stakeholders in longer-term relationships.
- Donors and stakeholders want to know that you are going to make it!

Sample of a capitalization strategy:
Boston Baroque's Four Pillars Campaign
Case Statement Preparation



Four Pillars Campaign:

Building for Boston Baroque's 50th

BOSTON BAROQUE

Martin Pearlman, Music Director

Mission and Programs

Artistic
Excellence

Financial
Stability

Community
Outreach and
Education

Institutional
Visibility

FIVE-YEAR INVESTMENT

ARTISTIC INVESTMENT

Opera Productions	\$ 175,000
Guest Soloists	\$ 175,000
Additonal Orchestra Expenses	\$ 250,000
Artistic Investment Total	\$ 600,000

FINANCIAL STABILITY

Capacity Building (two-year Investment)	\$ 150,000
Campaign Manager and Dev. Associate	
Cash Reserve Fund	\$ 350,000
Financial Stability Totals	\$ 500,000

COMMUNITY OUTREACH AND EDUCATION

Free Community Concerts Residency	\$ 100,000
<i>Classics for Kids</i> Commission and Concerts	\$ 100,000
Community Outreach and Education Total	\$ 200,000

INSTITUTIONAL VISIBILITY

Recording Projects	
Monteverdi, <i>L'incoronazione di Poppea</i>	\$ 100,000
Two More Recordings	\$ 250,000
Boston Baroque Radio	
Radio Content Addition and Enhancement	\$ 50,000
Tours	
Establish a New York Presence	\$ 200,000
Runouts: e.g., Tanglewood, Ravinia, others	\$ 100,000
Institutional Visibility Total	\$ 700,000

CAMPAIGN TOTAL **\$ 2,000,000**



From top: Scenes from Boston Baroque's 2017 semi-staged opera presentation, Handel's *Giulio Cesare*, at NEC's Jordan Hall.

													50TH ANNIVERSARY				
# OF DONORS	GIFT	IMPACT	GIFT PER YEAR	Y1	DONORS PER YEAR				CAMPAIGN YEARS					LINGERING EFFECT			TOTALS
					Y2	Y3	Y4	Y5	FY17	FY18	FY19	FY20	FY21	FY22	FY23	FY24	
0	\$500,000		\$100,000														
1	\$350,000	\$350,000	\$175,000	1					\$175,000	\$175,000							\$350,000
2	\$250,000	\$500,000	\$50,000	1		1			\$50,000	\$50,000	\$100,000	\$100,000	\$100,000	\$50,000	\$50,000		\$500,000
2	\$150,000	\$300,000	\$30,000		1	1				\$30,000	\$60,000	\$60,000	\$60,000	\$60,000	\$30,000		\$300,000
3	\$100,000	\$300,000	\$20,000	1	1	1			\$20,000	\$40,000	\$60,000	\$60,000	\$60,000	\$40,000	\$20,000		\$300,000
6	\$50,000	\$300,000	\$10,000	2	2	2			\$20,000	\$40,000	\$60,000	\$60,000	\$60,000	\$40,000	\$20,000		\$300,000
6	\$25,000	\$150,000	\$5,000	2	2	2			\$10,000	\$20,000	\$30,000	\$30,000	\$30,000	\$20,000	\$10,000		\$150,000
8	\$10,000	\$80,000	\$2,000	2	3	3			\$4,000	\$10,000	\$16,000	\$16,000	\$16,000	\$12,000	\$6,000		\$80,000
10	\$5,000	\$50,000	\$1,000	2	4	4			\$2,000	\$6,000	\$10,000	\$10,000	\$10,000	\$8,000	\$4,000		\$50,000
12	\$2,500	\$30,000	\$500	6	3	3			\$3,000	\$4,500	\$6,000	\$6,000	\$6,000	\$3,000	\$1,500		\$30,000
25	\$1,000	\$25,000	\$200	10	15				\$2,000	\$5,000	\$5,000	\$5,000	\$5,000	\$3,000			\$25,000
100	\$500	\$50,000	\$100	25	25	25	25		\$2,500	\$5,000	\$7,500	\$10,000	\$10,000	\$7,500	\$5,000	\$2,500	\$50,000
175	TOTAL: \$2,135,000			52	56	42	25	0	\$288,500	\$385,500	\$354,500	\$357,000	\$357,000	\$243,500	\$146,500	\$2,500	\$2,135,000

QUESTIONS

