

THE WESTMORELAND MUSEUM OF AMERICAN ART

FY 2022 FUNDRAISING PLAN

INTRODUCTION

The purpose of developing an annual giving development plan is to help the board and staff set revenue goals with respect to the annual budgeting process. The plan also outlines the strategic steps required to reach those goals, as well as board and staff responsibilities in accomplishing the plan. This proposed FY 2022 plan identifies targeted financial goals necessary to support the fiscal year operating budget recommended by the Finance and Executive Committee and approved by the Board on April 27, 2021.

I. FINANCIAL GOALS

PROJECTED FY 2022 OPERATING BUDGET: \$2,987,000

Income Categories	FY 2022 Income Projections	% of Total 2022 Income
Contributions/Grants		
Foundations/Family Trusts	\$1,267,000	42%
Government	338,000	11%
Individuals	265,000	9%
COVID-related grants	105,000	4%
Earned Revenue		
Earned Revenue		
Spring Event (former BAP)	150,000	5%
Outside Rentals	90,820	3%
Membership	90,000	3%
Museum Shop/Cafe	62,000	2%
Education/Special Events	22,700	.007%
Admission Donations	10,560	.003%
Endowment Distribution	435,000	15%
Other (release from restricted grants)	149,006	5%
Total Income	\$2,987,086	

II. STRATEGIC GOALS

From the Strategic Plan approved January 2019; fundraising plan most closely aligned with goal #5 detailed below:

- 1. We welcome and invite everyone.**
- 2. We share stories.**
- 3. We challenge, encourage, provoke thought, and spark curiosity.**
- 4. We strive to have positive impact.**
- 5. We are committed to financial, philanthropic and operational excellence:** our practices ensure sustainability for future generations.

C. Diversify Funding Sources

1. Increase endowment assets, restricted resources for acquisitions and conservation, programmatic support, and annual operating donations.
2. Strengthen government relations and public investments in arts and culture.
3. Increase earned revenue streams including expanded membership and individual donor base.

Metric of success: The budget will have at least a 3-month reserve at all times. A strategy for planned giving will be developed and the current endowment will increase by 25% over the next two years. Grants from state and federal sources will increase for restricted projects. Earned income in rentals, events and the Museum store will increase by 25% over the next two years. *COVID note: metric benchmarks reset once the Museum is fully open to the public and attendance resumes to historical levels.*

D. Provide Excellent Stewardship of Organizational Assets

1. Provide investment and financial oversight, and adherence to charitable laws.
2. Provide superior donor, member and customer experiences through the proper fulfillment of donor intentions, personalized gratitude, and excellent customer service and donor stewardship.

Metric of success: Achieve an individual donor retention rate of more than 75%. (Currently at 70%) and achieve individual donor growth rate of 5%.

COVID note: individual giving for both memberships and individual contributions static with pre-COVID levels; national decline of 7.5% to arts and culture in 2020 with more donations directed to Human Services and Public-Society Benefit organizations. Arts and culture the only sector to realize decline of more than 5% during COVID. (Giving USA 2021: The Annual report on Philanthropy for the year 2020).

- 6. We are nimble, proactive, and open to new opportunities.**

III. SOLICITATION STRATEGIES

A. Personal Solicitation Campaign

1. **Individual Solicitation** – Membership (\$90,000)

Time Frame: monthly membership renewals

Number 546

Goals:

WS Membership* Projection: 66 \$41,600/\$28,000

Partner [\$5,000 (\$4,200/\$800)]: 5 \$21,000/\$4,000

Inner Circle [\$2,000 (\$1,400/\$600)]: 5 \$7,000/\$3,600

True Blue [\$1,000 (\$400/\$600)]: 12 \$4,800/\$7,200

Best Friend Forever [\$500 (\$200/\$300)]: 44 \$8,800/\$13,200

*Trustees are asked to become Westmoreland Society members as part of their service. Portions of Westmoreland Society memberships are allocated to a restricted art acquisition fund. Totals above reflect portion of membership allocated to unrestricted operations/restricted art acquisition fund.

General Membership Projection: 480 \$48,547.5

Patron (\$250): 37 \$9,250

Best Friend (\$150): 103 \$15,450

Best Friend Senior/Military/Student (\$100): 131 \$13,100

Good Friend (\$75): 80 \$6,000

Good Friend Senior/Military (\$37.50): 125 \$4,687.5

Good Friend Student (\$15): 4 \$60

General membership totals are allocated in their entirety to unrestricted operations.

2. **Individual Solicitation** – Individual Contributions (\$265,000)

Time Frame: December and May targeted appeals; ongoing throughout the year

Number 467

Goals:

Major Gift Projection 32 (\$250,000)

\$100,000 or more: 2 \$200,000 (January and May)

\$10,000 or more: 1 \$10,000

\$5,000 - \$9,999: 4 \$20,000

\$2,500 - \$4,999: 2 \$5,000

\$1,000 - \$2,499: 15 \$15,000

Annual Appeal Projection: 435 (\$15,000)

\$500 to \$999: 10 \$5,000 (avg. \$500)

Up to \$499: 425 \$10,625 (avg. \$25)

Individual Membership and Contribution Methods:

Letter from Chair and Development Committee Chair sent to each Trustee in summer following July Board meeting to recognize fundraising efforts on behalf of Museum (i.e., corporate sponsorship, discretionary foundation fund recommendations) and in addition, request personal membership and annual appeal pledges for the fiscal year and preferred timing of giving.

Major Gift cultivation: personal cultivation and stewardship of \$100,000 donors; more rigorous engagement of board and senior staff in building relationships with prospects and donors \$1,000 and above through identification, strategy development, cultivation, solicitation and stewardship. The potential for organizational growth is greatest with more investment in major gift development. (See cultivation strategy below.)

Membership renewals (1st, 2nd, and 3rd) sent at the beginning of each month. Letters tailored to highlight benefits for each month (exhibition previews, NARM access to participating museums, early access registration for events, etc.) Westmoreland Society renewals highlight benefits of December dinner and number of votes for acquisition selection.

Direct annual appeal mailing: Story theme is chosen; coordination with marketing to send accompanying email appeal.

B. Government and Foundation Grants

Time Frame:	ongoing throughout the year
# government	25+
# of submissions	35 - 50 (Includes LOIs and proposals)
# of reports	50 (includes interim and final)
Goals:	\$300,000 DCED Tourism (\$500,000 ask); \$38,000 PCA \$1,267,000 Foundation grants

Method:

Government Relations: Legislative breakfast spring 2022; paid lobbying efforts; Advancement Director responsible for coordinating outreach efforts between CEO and lobbyist to more than 25 U.S. Senate, U.S. Congress; Federal agencies (NEA, NEH, IMLS); Westmoreland County Caucus; State Senate, State Representative, PA Department of Community and Economic Development/Tourism agency, Westmoreland County Commissioners, and municipal officials.

Foundation Relations:

Operations - \$965,000 out of total \$1,267,000 (75%) supported by 4 leadership funders supporting operations: Richard King Mellon Foundation (\$500K); Allegheny Foundation (\$250K); Katherine Mabis McKenna Foundation (\$115K) Eden Hall Foundation (\$150K with \$100K supporting curatorial salaries and \$50K restricted exhibition costs.)

Restricted grants to advance strategic initiatives – support for exhibitions (Fallingwater, Gatecrashers, exhibition fund plan and Hillman Foundation strategy); re-installation project; collections digitization/assessment; virtual production needs; Center 5th Ward/Spring Avenue Park; for Creative Connections; data collection/visitor intercept; accessibility upgrades; lighting and activating outdoor areas; DEAI.

Pennsylvania Council on the Arts PPA program - The Westmoreland is the PCA Pennsylvania Partners in the Arts regional partner to re-grant small PCA grants to art museums in Region 12 (Westmoreland, Bedford, Blair, Cambria, Fayette and Somerset Counties). The Westmoreland was awarded \$66,323 with \$36,000 allocated to be re-granted and \$30,323 for staffing costs and travel for Daria Jarani to administer the program. With 20% of the Grant-writer's time devoted to administer PPA activities (in addition to Finance staffing to account for re-granting), PCA funds are being used to contract with a grant-writing to provide staffing support to manage foundation reporting and submission requirements.

C. Special Events

1. Spring 2022 Event (\$150,000 gross; \$100,000 net)

Time Frame: May 14, 2022
Number 168
Goals: Sponsorships (\$100,000; tickets \$20,075; auction \$10,000)

Method:

Wine Tasting Reception; 10 tasting stations throughout the upstairs galleries; welcome reception in Center for Creative Connections; groups of 10 guided by a staff host; guests enter at side door near Community Room and are led up the stairs immediately to welcome reception and gallery stations. Total capacity wine reception: 125

Seated dinner (tables of 8); capacity for 112 in Community Room (14 tables of 8); 24 in Robertshaw Gallery (3 tables of 8); 32 in Lobby (4 tables of 8). Total capacity for seated dinner: 168 (guests; room for required servers)

Guest Sommelier(s) [Wine/Bourbon/Whiskey]/Chef
Dessert and Dessert Wines
Gift shop cleared for Silent Auction
Musicians from The Westmoreland Symphony
Garden attire

Projected Budget: \$175 pp for reception and dinner / \$125 pp dinner only

Sponsors: Sponsor packets mailed in August

1 @ \$25,000 – benefit of 16 \$175 tickets (2 tables); estimated 16 tickets

2 @ \$10,000 – benefit of 8 \$175 tickets (1 table); estimated 16 tickets

6 @ \$5,000 – benefit of 4 \$175 tickets; estimated 24 tickets

10 @ \$2,500 – benefit of 2 \$175 tickets; estimated 20 tickets

\$100,000 – 76 reception and dinner tickets

125 reception capacity less 76 sponsor reception/dinner tickets equals 49 tickets @ \$175

168 dinner capacity less 76 sponsor reception/dinner tickets equals 92 tickets @ \$125

Tickets: Save the date/press release in summer 2021; invitation in March 2022

Reception/dinner – 49 x \$175 totals \$8,575

Dinner only – 92 x \$125 totals \$11,500

\$20,075 - Total non-sponsor ticket sales

Auction: \$10,000

Projected Revenue: \$130,075

Projected Expenses: \$50,000

Net: \$80,075

2. Art After Hours/Art in Focus (Art on Tap re-imagined)

Time Frame: October 15, December 10, February 25, April 15, May 6, June 17

Number 600

Goals: \$3,000 - 6 \$500 business sponsorships

Method: Send out sponsor packet to past and prospective local businesses in August highlighting new formatting for event focused on local artists exhibiting in the Robertshaw Gallery and local makers/vendors in the Museum Shop.

3. Westmoreland Society Dinner

Time Frame: December 3, 2021

Number 66 current members (~125 people accounting for singles)

Goals: Cover cost of the dinner and secure \$28,000 in art acquisition funds

Method: Build Westmoreland Society membership through more engagement with Curatorial/Collection department activities including Doris Lee lender reception in September. Coordinate collector interaction between Curatorial/Collections and Advancement department.

D. Planned Giving

Time Frame: ongoing throughout the year
Number being determined

Method: Reactivate planned giving outreach; determine number of known Legacy Society members; update planned giving brochure in September; provide support to trustees in the area of gift planning; review and update gift policy; agreements (naming/promise to give/deed of gift); update planned giving brochure and planned giving site on re-designed website; host spring planned giving informational session for trustees, Committee members and select list targeting repeat donors with a giving history of 10+ years.

Feature Thompson bequest in Fall Perspectives to highlight impact of this kind of giving to the Museum.

IV. CULTIVATION STRATEGIES

The purpose of cultivation is:

- 1) To add prospects to our donor base and develop them to become active supporters and regular donors;
- 2) To improve relationships with current board members, donors, volunteers, and other WMAA friends to build a greater understanding of how they can help our agency achieve its mission;
- 3) Engage the next generation of donors.

Donor and volunteer recognition are critical to the cultivation process. Cultivation needs to be discussed regularly at board meetings to encourage each board member to become part of the cultivation process.

A standard portfolio for fundraisers should consist of up to 75 prospects to whom fundraisers are assigned as Prospect Manager. This limit includes PM assignment to prospects in active and stewardship statuses. Current Advancement staffing is stretched to manage current portfolio. Additional investment in staffing to focus on individual cultivation would accelerate individual donor growth. Responsibilities include:

- Engaging prospects by connecting them with appropriate Museum partners, areas, and activities;
- Being knowledgeable about prospect interests and Museum priorities;
- Developing and executing thoughtful plans with strategic steps that result in successful solicitations;
- Documenting interactions, plans, and outcomes in Salsa Cultivation Tool

- Communicating regularly with assigned prospects and university partners and coordinating efforts of a prospect team comprised of additional Trustees, fundraising volunteers, CEO, Director of Advancement, Senior Team, and Advancement staff.