

CELEBRATING 25 YEARS

MADE WITH
**100%
PASSION**



THE FABRIC OF FUNDRAISING

FUNDRAISING DAY
MAY 30, 2019

**METRO TORONTO
CONVENTION CENTRE**

Fundraisers are from Mars, Marketers are from Venus

Presented by:

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The Art of *Miscommunication*....

Fundraiser

- It's just a quick proof!
- I need it by end of the week
- We should have a big media announcement about this
- Do you really need me to fill out a creative brief?

Marketer

- It's a *total* rewrite
- Your meeting is next month
- Why is this newsworthy?





Today's Learning Goals

- Share tips for enhancing communication and collaboration between revenue-generating programs and marketing teams
- Understand how to develop a solid proposal development process for your organization
- Learn tools for managing multiple competing priorities related to donor approaches



How to Amplify Cross-Departmental Collaboration

- Set intentional and regular meetings
- Strike cross-team taskforces for special projects
- Brainstorm together and workshop ideas
- Cultivate a dynamic between groups that functions as a strategic partnership, not a service centre

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The Sales Team will "Sell the
Dream" and then
Customer Support
will "Service the
Nightmare."



someecards
user card

Pipeline Development Meeting Agenda

Meeting Purpose: Proactive pipeline management and support

Frequency: Bi-weekly

Duration: 1 hour

Attendees: All Relationship Managers, Research, Communications

Chair: VP, Philanthropy

Meeting support: Philanthropy Administrator

Agenda Item	Discussion Lead	Resource
Review of 'decisions pending' for likelihood of success and where assistance is required;	All	Proposals to Close Report – current quarter in decisions pending
Review of next up prospects – each asked to discuss the next 3-5 prospects they are focused on cultivating. Prospect only, no projects;	All	Activity Report (each RM to bring their own)
Prospect push – limit to 1-3 high quality prospects with round-table discussion on strategy for prospect engagement, connectors, etc.	Research	As presented
Prospect Clearance – to coordinate assignments and reassignments, seek input from others on strategy	Research	Prospect Clearance spreadsheet
Reports – new and upcoming business processes, data management tips	Research/Operations	As presented

Relationship Management Meeting Agenda

Meeting Purpose: A comprehensive and collaborative approach to maximizing and leveraging all ROM Governors activity for revenue generation.

Frequency: Monthly

Duration: 1 hour

Attendees: All Relationship Managers, Research, Events, Stewardship, Communications (at least one representative from each enabling team – delegate as needed).

Chair: VP, Philanthropy

Meeting support: Philanthropy Administrator

Agenda Item	Lead	Resource
Review of financial targets and funds raised to date;	Finance	Financial Report (latest)
Discuss upcoming ROM and ROM Governors events and identify opportunities for cultivation and stewardship;	Events	Events Calendar
Share new assets that have been developed that can be leveraged (proposals, briefs, messaging, etc)	Comms	Assets Lists Communications Calendar
Review of prospects nearing solicitation stage to identify communications needs;	All	Proposals to Close – current quarter in cultivation and solicitation
Review of all confirmed gifts (this fiscal and multi-year) to consider stewardship opportunities;	All	Gifts closed in the past month



Tools to Enhance Communication & Collaboration

- Creative briefs and proposal request forms
- Categorized project updates and run sheets
- Weekly meetings, status emails or calendar reminders
- Standardized templates, brand guidelines and key messages
- Clarity of language, roles and responsibilities

PROPOSAL BRIEF FORM

PROJECT TITLE		
Target Audience or Stakeholder Group(s)		
PROJECT OVERVIEW	Purpose:	
	Request:	
	Description:	
Relationship Manager:		
ROM Project Manager:		
REQUESTED DEADLINES	Materials:	
	First Draft:	
	Design:	
	Final:	
Follow-Up Briefing:	<input type="checkbox"/> Required <input type="checkbox"/> Unrequired	
Approvals Required:	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Approving Manager(s):		
Donor Meeting:	<input type="checkbox"/> Scheduled <input type="checkbox"/> Unscheduled	
Date of Meeting:		
KEY MESSAGES AND OBJECTIVES		
Length / Format:	<input type="checkbox"/> Proposal <input type="checkbox"/> Presentation <input type="checkbox"/> Report <input type="checkbox"/> Letter <input type="checkbox"/> Backgrounder	
Style / Tone:	<input type="checkbox"/> Public <input type="checkbox"/> Corporate <input type="checkbox"/> Government <input type="checkbox"/> Academic	
Donor Priorities:		
DESIGN CONSIDERATIONS		
Logos / Crediting:		
Imagery:		
ADDITIONAL INFORMATION		

Q1 Communications Requests from Philanthropy

Principal & Major Gifts Proposals	Request Pending	In Development	In Review/Approvals	On Hold	Complete
Biodiversity and Environmental			X		
Earth Sciences					X
Cultivation Event Invitation: Dutch Paintings					X
Thank you Letters and Pledge Reminders templates					X
Modern Design Installation			X		
Greek Learning and Engagement		X			
Cultivation Event Invitation: Meet the New Curators	X				
Corporate Engagement Proposals	Request Pending	In Development	In Review/Approvals	On Hold	Complete
Wi-fi Provider			X		
Jade proposal		X			
Corporate Partnership Overview		X			
Paleo Exhibition		X			
Tightrope exhibition		X			
Legacy and Estates	Request Pending	In Development	In Review/Approvals	On Hold	Complete
DMP Invitation					X
Updating CLS letters		X			
CLS Summer lecture on Aug 12		X			
CLS Fall Luncheon	X				
Legacy New Member Tour evite	X				
Redesign of Legacy Commitment Forms	X				
Donor Circles & Annual Giving	Request Pending	In Development	In Review/Approvals	On Hold	Complete
Patrons Newsletter					X
YPC New Member Event Invite		X			
It's Alive Invite		X			
YPC FNL Pride Invite		X			
Promotional postcards for RPC and YPC	X				
Revised YPC and new RPC e-renewal templates	X				
Sub-cases for Support	Request Pending	In Development	In Review/Approvals	On Hold	Complete
Inclusion		X			
Exhibitions Strategy	X				
ROM Programs	X				
Collections Care	X				
School Visits	X				
Indigenous	X				



Share the Goal

- Collaborative business planning process
- Regular strategic planning sessions
- Annual objectives and performance assessments
- Fostering an organization-wide culture of philanthropy
- Relentless ROI filter on activity and new ideas



Evaluate Activity and Progress to Goal

- Start the practice of an annual Onsite Analysis
- Track activity and pull data regularly
- Have fearless and vulnerable conversations
- Change what isn't working

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**WITHOUT DATA
YOU'RE JUST
ANOTHER PERSON
WITH AN OPINION.**



Celebrate Success Together

- Acknowledgement from leadership and peers
- Start a fun tradition to share good news or wins
- Post-event debrief and therapy session
- Block time in calendars for reflection and action



Grazie!

Merci!!!

Thank
you

Щиро дякую!

תודה

THANK
YOU

متشكرم

Obrigada!

THANK YOU

Hvala vam

謝謝

DANKE!

Cam'ou
ban

HVALA

Dziekuję

Merci!
R-M

Gracias!

Diolch

مرسی

Thanks
y'all!

MERCI

DEKUJI

RC



A CASE STUDY OF SUCCESS

**Willner Madge Gallery, Dawn of Life
Gift Strategy & Announcement**



The Challenges

- Ambitious fundraising targets (\$10M+)
- Small prospect pool
- Dense subject matter
- Difficult assets to animate

THE FASCINATING STORY OF EARLY LIFE ON EARTH

Transformative gifts to the Royal Ontario Museum enable plans for the much-anticipated Willner Madge Dawn of Life Gallery to move ahead

BEFORE TOO LONG, DR. JEAN-BERNARD CARON, RICHARD M. IVEY CURATOR OF INVERTEBRATE PALAEONTOLOGY AT THE ROYAL ONTARIO MUSEUM (ROM), hopes names of fossils like *Tiktaalik*, *Fractodus* and *Anomalocaris* will roll off young visitors' tongues as easily as those of their favourite dinosaurs *Tyrannosaurus*, *Bachosaurus* and *Triceratops*.

Hundreds of specimens from the ROM's early life collections – one of the world's largest and most significant representing close to 3.5 billion years of time, from the origin of life itself to the origin of dinosaurs and mammals about 200 million years ago – will be showcased in the new 10,000-square-foot Willner Madge Dawn of Life Gallery on the museum's second level.

The new gallery will connect the ROM's natural history collections by bridging the Tech Suite of Galleries, Earth's Treasures and the James and Louise Temerty Galleries of the Age of Dinosaurs.

While the Dawn of Life Gallery has been anticipated for some time, a recent \$5-million gift from Toronto philanthropist and ROM governor Jeff Willner is enabling the project to move ahead, and plans are underway to create interactive displays using the latest multimedia technology to give visitors an immersive experience as they look back in time.

"Jeff Willner and other donors like the key family, the Salamander Foundation and Elinor Radcliffe recognize the importance of this story, the narrative of early life on Earth. They understand that with their transformational philanthropy they are making a difference both in the ROM and in the world," says Josh Basechies, ROM director and CEO.

Ms. Radcliffe first became intrigued with the concept of the gallery when she discovered that Mistaken Point, a UNESCO World Heritage site in her home province of Newfoundland and Labrador, is one of four major Canadian sites to be represented in the gallery. At 570 million years, Mistaken Point preserves the first large and complex multicellular organisms and is the world's oldest known Ediacaran fossil beds.

"I went to the ROM to meet with Dr. Caron, intending to tour all the galleries to see the context of the Dawn of Life Gallery. But I was so fascinated by his stories about the fossils and seeing the 3-D images that I didn't get any further," she says. After going home and doing some research, she followed up the visit with a donation to help make the gallery a reality.

Canada has a very rich geological history, and Dr. Caron says much of the story of early life on Earth will be told thanks to fossils found in Canada.

In addition to Mistaken Point, the gallery will feature fossils from three other Canadian UNESCO World Heritage sites: The 508-million-year-old Canadian Rocky Mountain Parks' Burgess Shale in British Columbia yields one of the oldest and best-preserved marine animal communities on our planet dating back to the Cambrian period, the 275-million-year-old Miguasha National Park site in Quebec is the most diverse fossil fish locality in the world during the Devonian period, and the 320-million-year-old Jogjins Fossil DFRs in Nova Scotia is an area that contains the world's best example of a Carboniferous coal swamp, with rare remains of the earliest land-dwelling, egg-laying reptiles.



This is a story for all people, told from a uniquely Canadian perspective. It's going to be an amazing journey, and I'm so glad to be a part of it."

Jeff Willner
Toronto philanthropist and ROM governor



Top: Conceptual renderings of the future Willner Madge Dawn of Life. Above left: *Fractodus* fossil, found at Lake Simcoe, Ontario; above right: *Tiktaalik* fossil, found at Mistaken Point in Newfoundland and Labrador. (ROM)

Dr. Caron, who studies the origin of animals, is particularly excited by the prospect of seeing many Burgess Shale fossils on exhibit for the first time in this new gallery, many of which he collected and published with the rest of his team.

The ROM holds the world's largest and most extensive collection of Burgess Shale fossils (about 150,000 specimens) on behalf of Paris, Canada, and most specimens selected for this new gallery, including the Burgess Shale, have never been seen by the public.

Dr. Caron will continue his research trips to the Burgess Shale and, along with other scientific studies in paleontology that advance our understanding of early life, the gallery will be continuously updated with new information and specimens.

"While the gallery will be a dream come true for Dr. Caron, he believes it will inspire others to dream too. "It will be like a time machine, visitors will travel through time," he says, adding that this new gallery will put the other ROM fossil galleries, including the James and Louise Temerty Galleries of the Age of Dinosaurs, into a broader evolutionary perspective.

"The story of life on Earth is a long one – I think it's going to be a vehicle for dreams. After people have seen the deatrees, the myriad forms we are going to display and the changes

that have happened on Earth over time, I'm pretty sure they're going to dream about it. People will see the world in a new light," says Dr. Caron.

Mr. Basechies says in addition to its presence in Toronto, ROM experts carry out research across the country and around the world. "What we are aspiring to do is something crucial for the people of Canada, but also to break new ground in how the story of early life is told for a global audience and a global research community," he adds.

"This is a story for all people, told from a uniquely Canadian perspective," says Mr. Willner. "It's going to be an amazing journey, and I'm so glad to be a part of it."





Philanthropy Comes to Life

The Royal Ontario Museum (ROM) is grateful to Jeff Willner for his generous gift of \$5 million to establish the future **Willner Gallery, Dawn of Life**—a new permanent palaeontology gallery at the Museum that will tell the fascinating story of how life began on Earth.

Jeff joins a dedicated group of leadership donors and community supporters that are enabling the ROM to share one of the world's greatest collections of early life fossils with the public.

THANK YOU FOR YOUR GENEROUS SUPPORT: JEFF WILLNER, RICHARD M. IVEY, JENNIFER IVEY BANNOCK, ELINOR GILL RATCLIFFE, THE SALAMANDER FOUNDATION, THE LOUISE HAWLEY STONE CHARITABLE TRUST, THE DOROTHY STRELSIN FOUNDATION, W. ROBERT FARQUHARSON & FAMILY, ROSAMOND IVEY, ALBERT AND BARBARA MILSTEIN AND THE POLK FAMILY FUNDS, ROBERT J. DICKINSON PYNE, AND DR. MAUREEN TRUDEAU & JONATHAN, JASON & DR. SANDRA MERGLER.



rom.on.ca/support

ROM GOVERNORS CHARITABLE REGISTRATION NO. 1362 82126 RR0001

Photo: Josh Basseches, ROM Director & CEO, Jeff Willner, and Susan Horvath, President & CEO, ROM Governors.



Summary of Learnings

- Tips for enhancing communication and collaboration
- How to develop and track proposals
- Ways to manage multiple competing priorities

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A low-angle, upward-looking photograph of a modern skyscraper with a glass facade, reflecting the sky and surrounding buildings. The building's sharp angles and reflective surface create a dynamic, geometric pattern. In the background, other city buildings are visible under a clear blue sky.

THANK YOU



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