



PLEASE NOTE: This Feasibility Study is not indicative of Board of Trustee decisions regarding a proposed Capital Campaign, nor its priority projects. This is an estimation of fundraising capacity; an analysis of people interested in our proposed projects, and a suggested strategy from the consultants at Campbell & Company based on their 2023-24 study. This research report will help inform the Board's deliberations and decisions in regards to a Capital Campaign. This study precedes the creation of a Campaign Plan, which would come after the Board has consensus on projects and goals and votes to proceed with a campaign.



CAMPAIGN PLANNING STUDY

FINAL REPORT
FEBRUARY 2024

PLEASE NOTE:



Hyperlinks are used throughout to support navigation of the report.



Unattributed quotations featured in the report are drawn from a variety of study interviews and represent opinions that were consistently expressed. Some are edited for length and clarity.



“TWC” is used interchangeably with the full name “The Wild Center” throughout the report.

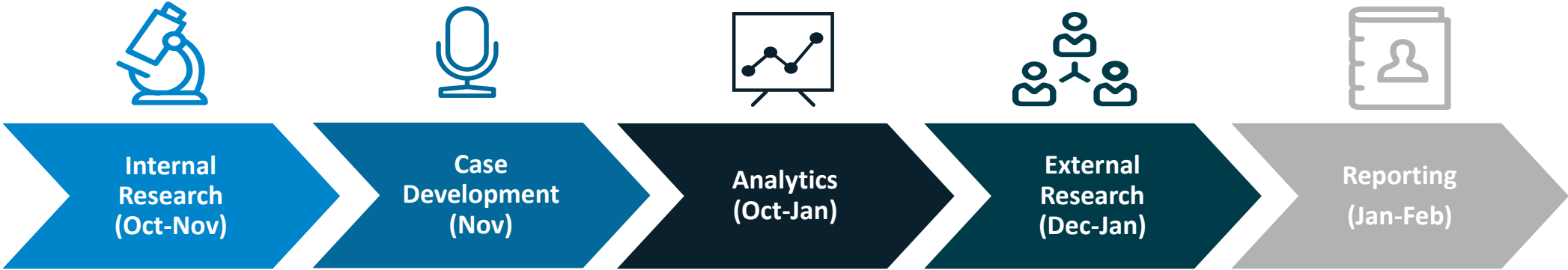
TABLE OF CONTENTS

<u>METHODOLOGY</u>	3
<u>CONTEXT TO INFORM STRATEGY</u>	9
<u>CAMPAIGN STRATEGY</u>	19
<u>CASE FOR SUPPORT</u>	27
<u>LEADERSHIP</u>	34
<u>DONOR ENGAGEMENT</u>	45
<u>STAFFING & SYSTEMS</u>	64
<u>NEXT STEPS</u>	74
<u>GRATITUDE</u>	75
<u>APPENDICES</u>	76



METHODOLOGY

PRE-CAMPAIGN PLANNING STUDY PROCESS



- ✓ Reviewed materials related to fundraising operations and plans
- ✓ Conducted internal interviews with staff and key leadership

- ✓ Conducted case interviews and workshop with TWC staff and leadership
- ✓ Created draft campaign case preview and incorporated TWC staff and Pre-Campaign Planning Committee feedback

- ✓ Conducted a capacity, pipeline, and portfolio analysis
- ✓ Assessed overall philanthropic capacity, identified a group of top prospects to prioritize, and identified gaps at various capacity levels

- ✓ Engaged current and prospective donors in in-depth, one-on-one conversations

- ✓ Analyzed all data and findings
- ✓ Developed a final report outlining a campaign strategy and recommending action steps and investments to achieve it

WHAT WE TESTED

A \$40M CAMPAIGN TO SUSTAIN AND GROW THE WILD CENTER



CAPITAL PROJECTS: A new Convening Center, a Facilities Building and renovation of the current Bio Building, and other capital investments including a Rainbow Bridge renovation, waterfront development, a perimeter road, animal enclosure upgrades, and infrastructure improvements



THE WILD CENTER FUND: Annual support for the “here and now” at The Wild Center, and a permanent endowment to support TWC’s financial sustainability and programming in the future

Campaign Vision* Proposed in the Study:

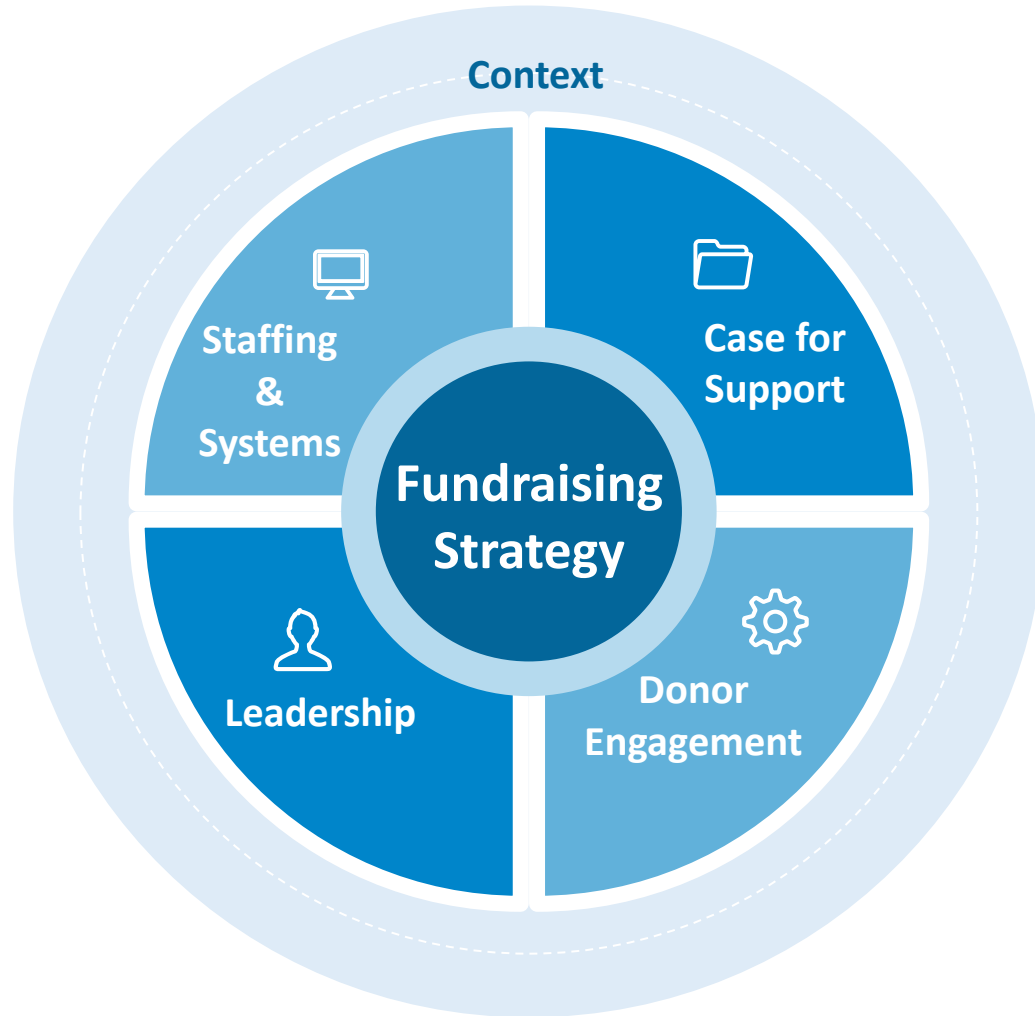
*By 2030, The Wild Center will be a trusted catalyst, redefining the role of museums in society and promoting people’s understanding of their role within the natural world. To expand our ability to steward, sustain, and grow the organization, **The Wild Center is preparing to embark on a \$40 million fundraising campaign.** Together, we will inspire support for the strategic investments that will fulfill our mission and realize our bold vision.*

**Some early study participants received the campaign preview as initially drafted. The majority were given an updated preview that aligned more closely with TWC’s strategic plan; as such, interviewees reacted to slightly different versions of the case for support.*

TESTED GIFT PROFILE: \$40 MILLION

Gift Level	Gifts Needed	Qualified Prospects Needed	Subtotal	Cumulative Total	Cumulative % of Goal
\$5,000,000	2	6	\$ 10,000,000	\$ 10,000,000	25%
\$2,500,000	3	9	\$ 7,500,000	\$ 17,500,000	44%
\$1,000,000	6	18	\$ 6,000,000	\$ 23,500,000	59%
\$500,000	10	30	\$ 5,000,000	\$ 28,500,000	71%
\$250,000	15	45	\$ 3,750,000	\$ 32,250,000	81%
\$100,000	30	90	\$ 3,000,000	\$ 35,250,000	88%
\$50,000	40	120	\$ 2,000,000	\$ 37,250,000	93%
\$25,000	50	150	\$ 1,250,000	\$ 38,500,000	96%
\$10,000	100	300	\$ 1,000,000	\$ 39,500,000	99%
Less than \$10,000	<i>Many</i>	<i>Many</i>	\$ 500,000	\$ 40,000,000	100%
Total	256	768			

CAMPAIGN PLANNING FRAMEWORK



1

CONTEXT

No campaign exists within a vacuum. Internal factors and the external climate set the context for the campaign and must be considered by The Wild Center when determining strategy.

2

CAMPAIGN STRATEGY

To be successful, a campaign needs an overarching strategy that details a feasible goal and timeline and articulates the investment necessary.

3

CASE FOR SUPPORT

The campaign's vision and impact must be clear and compelling and communicate a strong rationale for the funding priorities. The philanthropic case must be made for investing in TWC and its vision for the community.

4

LEADERSHIP

A campaign requires visible leaders willing to champion the effort, make connections, solicit gifts, and advise on strategy. Leadership comes from top staff and Board members, augmented by others committed to the campaign.

5

DONOR ENGAGEMENT

At all stages of the campaign, a commitment to relationship-based, donor-centered fundraising is essential. A strong base of donors must be ready to engage in and support the effort with leadership gifts.

6

STAFFING AND SYSTEMS

Staffing and systems must be in place to support volunteer leaders, manage donor relationships, and track and report on a higher level of development activity.





CONTEXT TO INFORM STRATEGY

No campaign exists within a vacuum. Internal factors and the external climate set the context for the campaign and must be considered by The Wild Center when determining strategy.

PROMISING INDICATORS

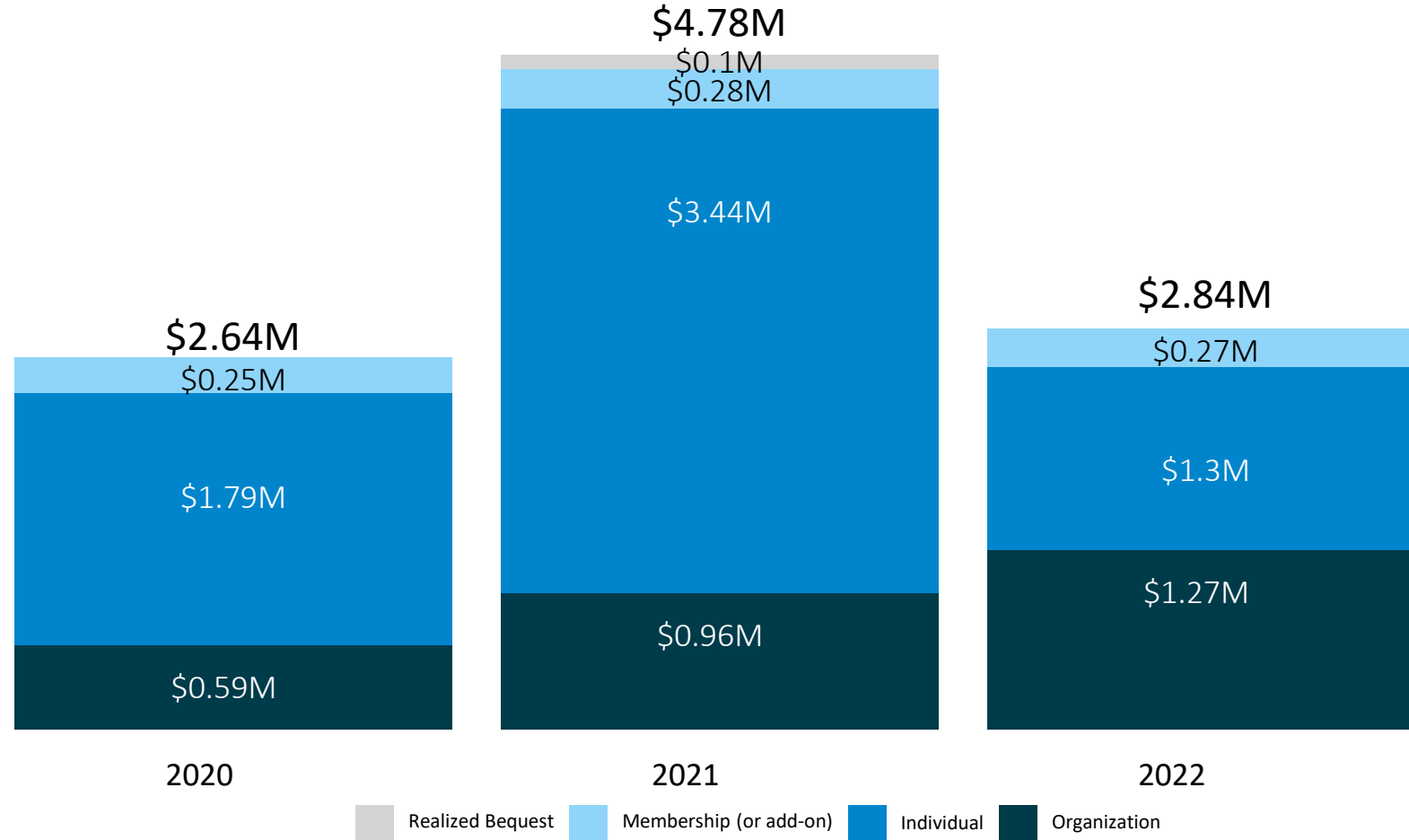
- **The Wild Center provides** innovative learning opportunities and experiences with nature, speaking to both local and, increasingly, global audiences.
- TWC has a special relationship with the Adirondacks, **making great use of the natural laboratory** it provides and serving as an **economic engine for the region**.
- The Wild Center is a **partner, connector, and convener of people who seek to learn about and find solutions to pressing environmental challenges collaboratively**—and seeks to level up in this capacity.
- The strong, unique, **impactful programming addresses critical issues** at a local, regional and national level.
- **Leadership and staff are responsive and trusted**—and ready to grow.
- TWC has achieved a **significant level of accomplishments** in a relatively short tenure.

POTENTIAL HEADWINDS & OPPORTUNITIES

- TWC seeks **to grow facilities, resources, and visibility**, and is driven to pursue this through a campaign.
- To achieve this growth through a campaign, **TWC needs to deepen and grow its donor base**, including by addressing the current gaps in mid-level giving and pipeline development.
- The remote and seasonally accessible **location is challenging but has potential to drive and shape creative outreach strategies**.
- The Board has been in a transitional period following the founding volunteer leadership **and is poised to redefine itself**.
- There are mixed perceptions of TWC's **work around climate change**, and whether the organization should **focus more on Adirondacks-based audiences or a broader landscape of potential supporters**.
- **TWC may encounter unavoidable outside factors**, including donor fatigue and competition with other initiatives in the Adirondacks, as well as economic and political uncertainties.

FUNDRAISING HISTORY

Fundraising Results Between FY20-FY22



Recent fundraising results (FY20-22) show a significant increase in individual (92%) and corporate giving (63%) from FY20 to FY21. Individual giving decreased by 62% from FY21-FY22, corporate giving moderately increased by 32%.



CAMPAIGN HISTORY

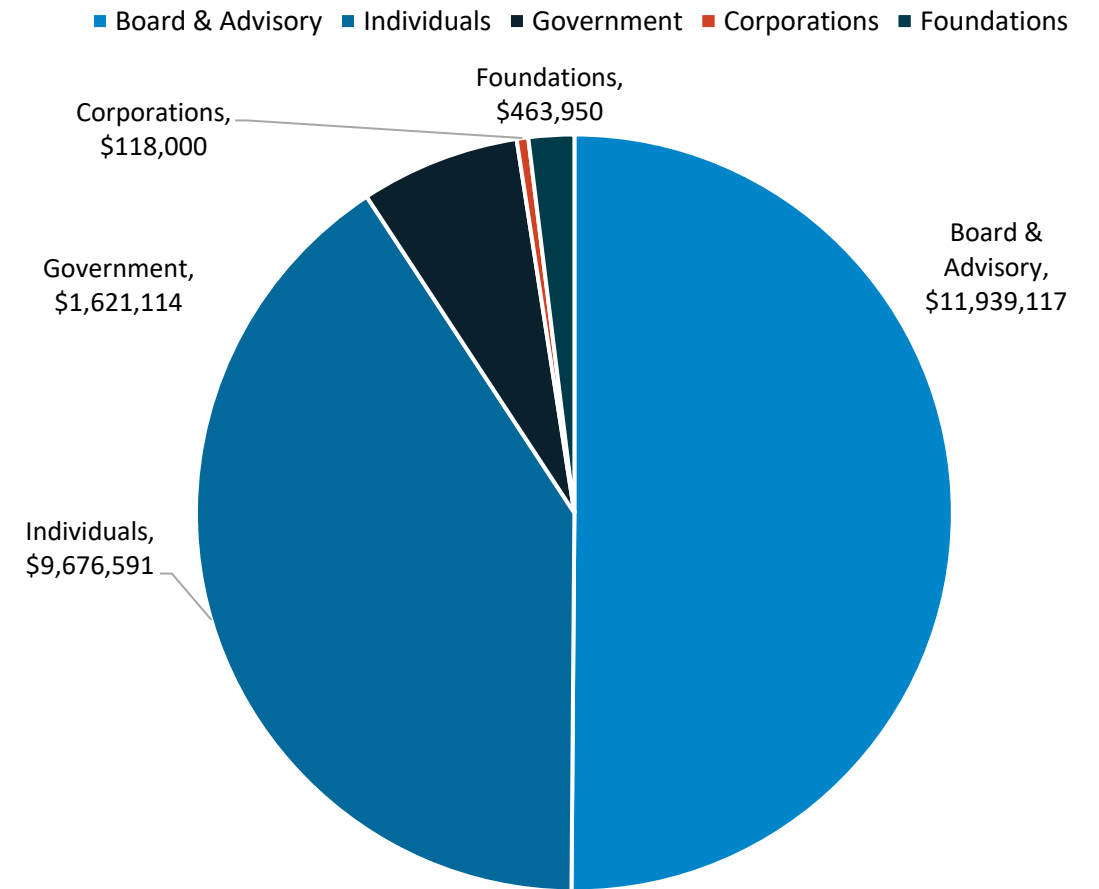
From Campaign for The Wild Center 2010 to 2016 Analysis Report

- The Campaign for The Wild Center exceeded it's \$20M Goal and raised \$23,697,333.
- In The Wild Center's last campaign, the Board and Advisory Board contributed ~\$12M, over half of the campaign's total fundraising goal.
- While overall fundraising surpassed expectations, The Wild Center saw fewer contributions between \$10k and \$500k than expected and saw more than 1.5 times the number of community gifts (<\$10,000) than planned.

**CAMPAIGN FOR THE WILD CENTER
GIFT TABLE**

Gift Level	Projected Number of Gifts	Number of Gifts Received	Total Gifts (\$)
\$2,500,000	1	1	\$2,819,282
\$1,000,000	3	4	\$6,333,814
\$500,000	6	2	\$1,581,681
\$250,000	12	4	\$1,338,676
\$100,000	20	16	\$2,279,477
\$50,000	40	15	\$966,062
\$25,000	80	44	\$1,523,555
\$10,000	160	72	\$1,078,213
<\$10,000	1,500	2,530	\$1,701,822

**CAMPAIGN FOR THE WILD CENTER:
GIFT BREAKDOWN**

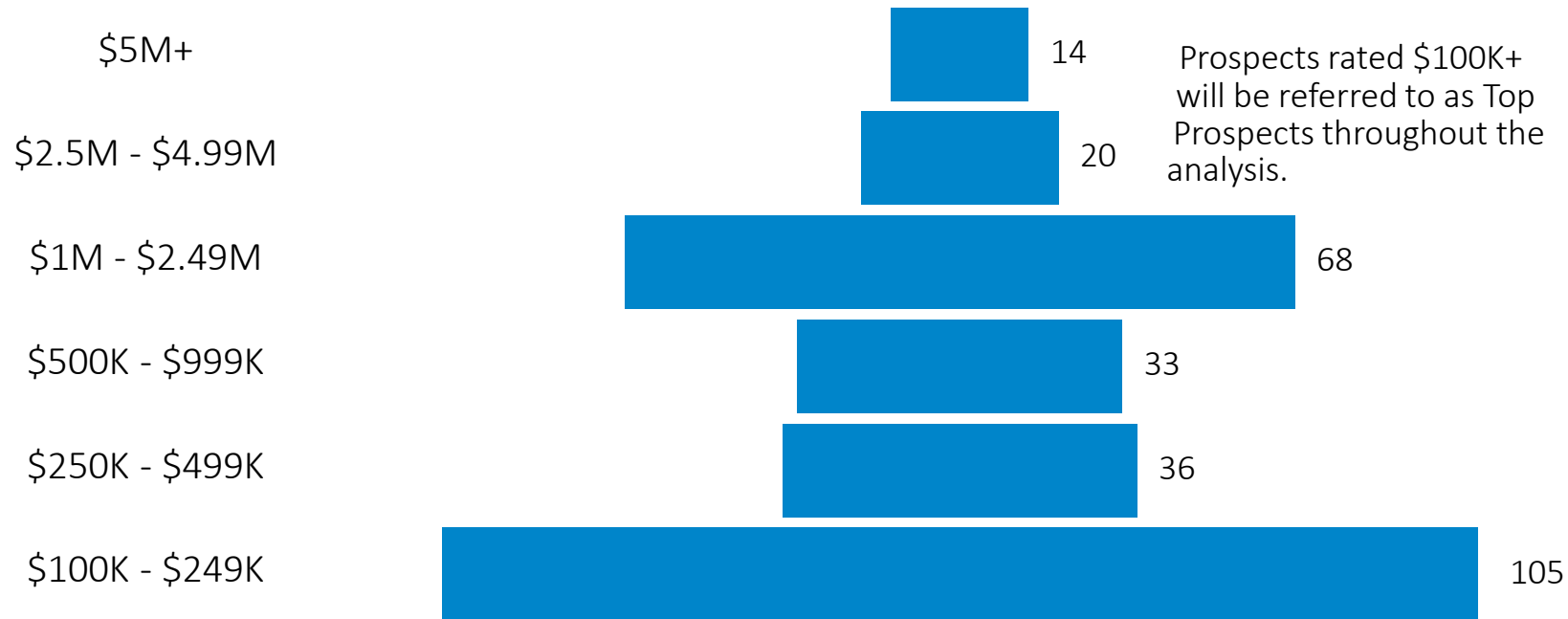


FINDINGS

Campaign Strategy

Capacity of Top Prospects

Campbell & Company found \$449M in capacity* from 276 Prospects rated \$100K+, as well as another \$1.1B in capacity from 755 Future Prospects rated \$100K+.



**Capacity is defined in terms of the BWI. BWI is the estimated amount a household or organization is able to give to all philanthropic interests over five years. See [Appendix E](#) for the quantification of capacity*

FINDINGS

Campaign Strategy

Giving self-identified by participants:

\$5.3 to \$6.6 million



The range of gifts we identified falls slightly below our preferred target (20% of the tested campaign goal), indicating that The Wild Center will need to **further cultivate current donors and strengthen relationships with prospects outside of the core donor pool** to reach the campaign goal.

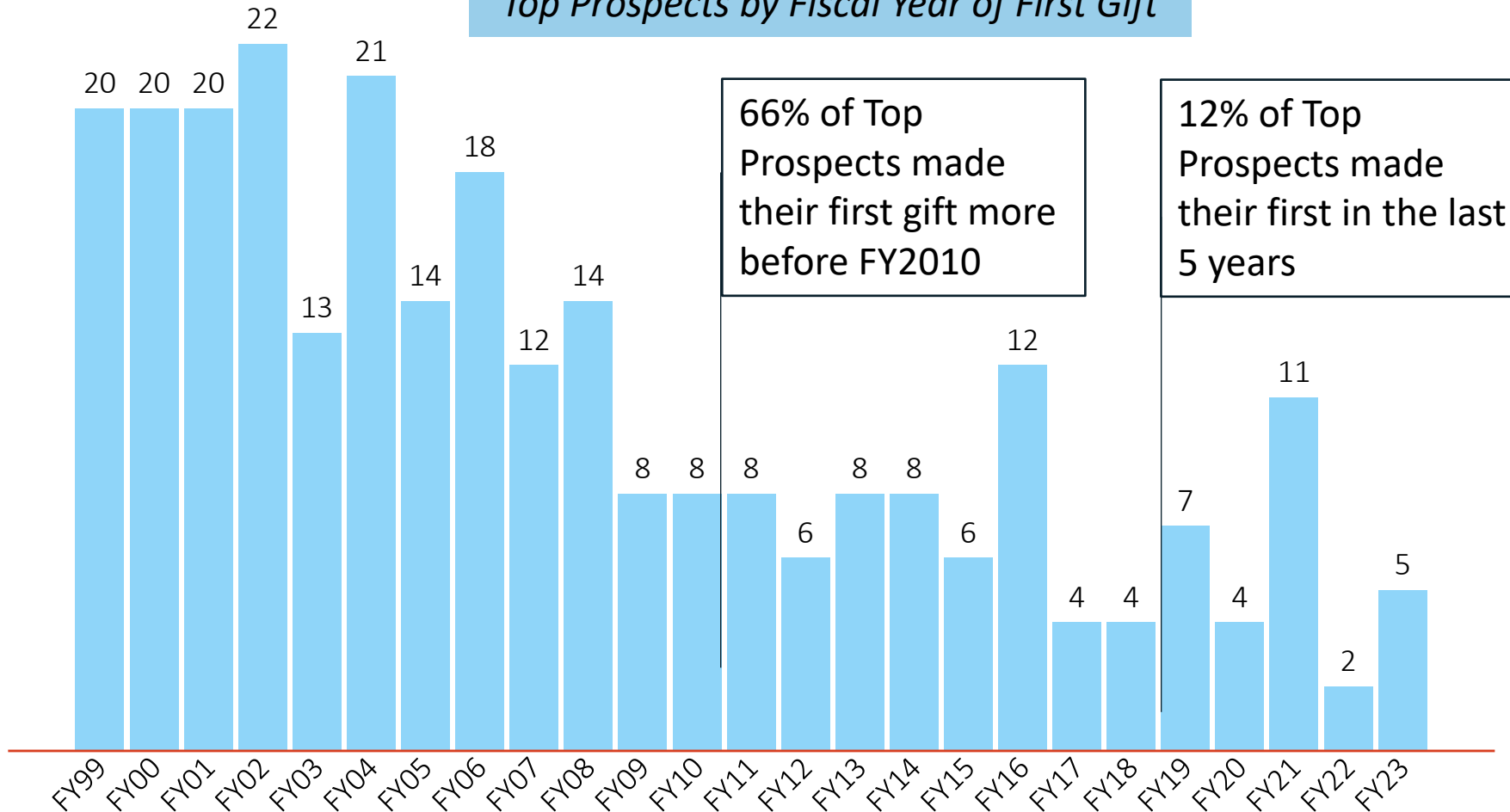
In the chart below, “interviewee stated” gifts are based on the estimates that interviewees directly shared, while “consultant estimated” gifts are based on interviewees’ capacity and known giving to other organizations, as well as conversational indications.

Potential Gifts: Interviewee Stated		
	Low	High
Individual Total:	\$5,317,000	\$6,575,000
Potential Gifts: Consultant Estimated		
	Low	High
Individual Total:	\$5,437,000	\$6,860,000

FINDINGS

Campaign Strategy

*Longevity of Prospects:
Top Prospects by Fiscal Year of First Gift*



Engagement of Top Prospects who are longtime donors may look different than those who made their first gift more recently.



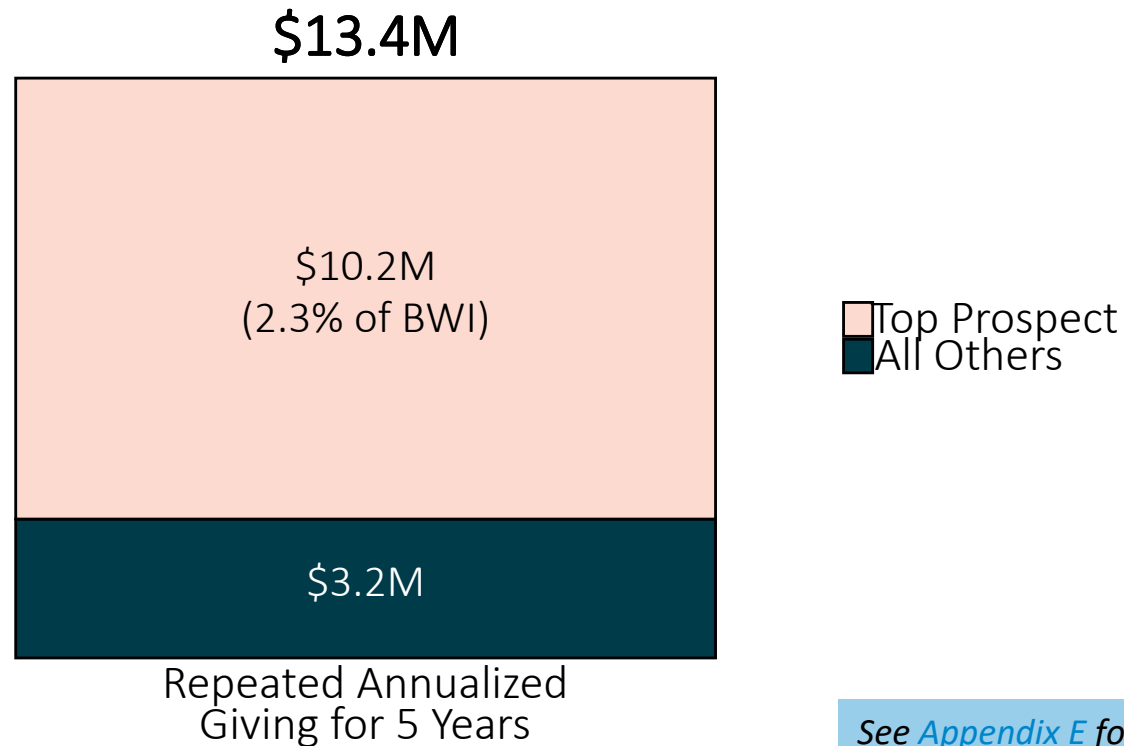
FINDINGS

Campaign Strategy

Campaign Baselines

The baseline assumes that anyone who is not a Top Prospect will continue to give, on average, what they have annually* for the next 5 years, which totals \$3.2M.

If Top Prospects repeated their annual gift for 5 years, they would give 2.3% of their BWI.



*Annual gift is based on the average of all gifts over the last five years.

See [Appendix E](#) for full Capacity Analysis report.



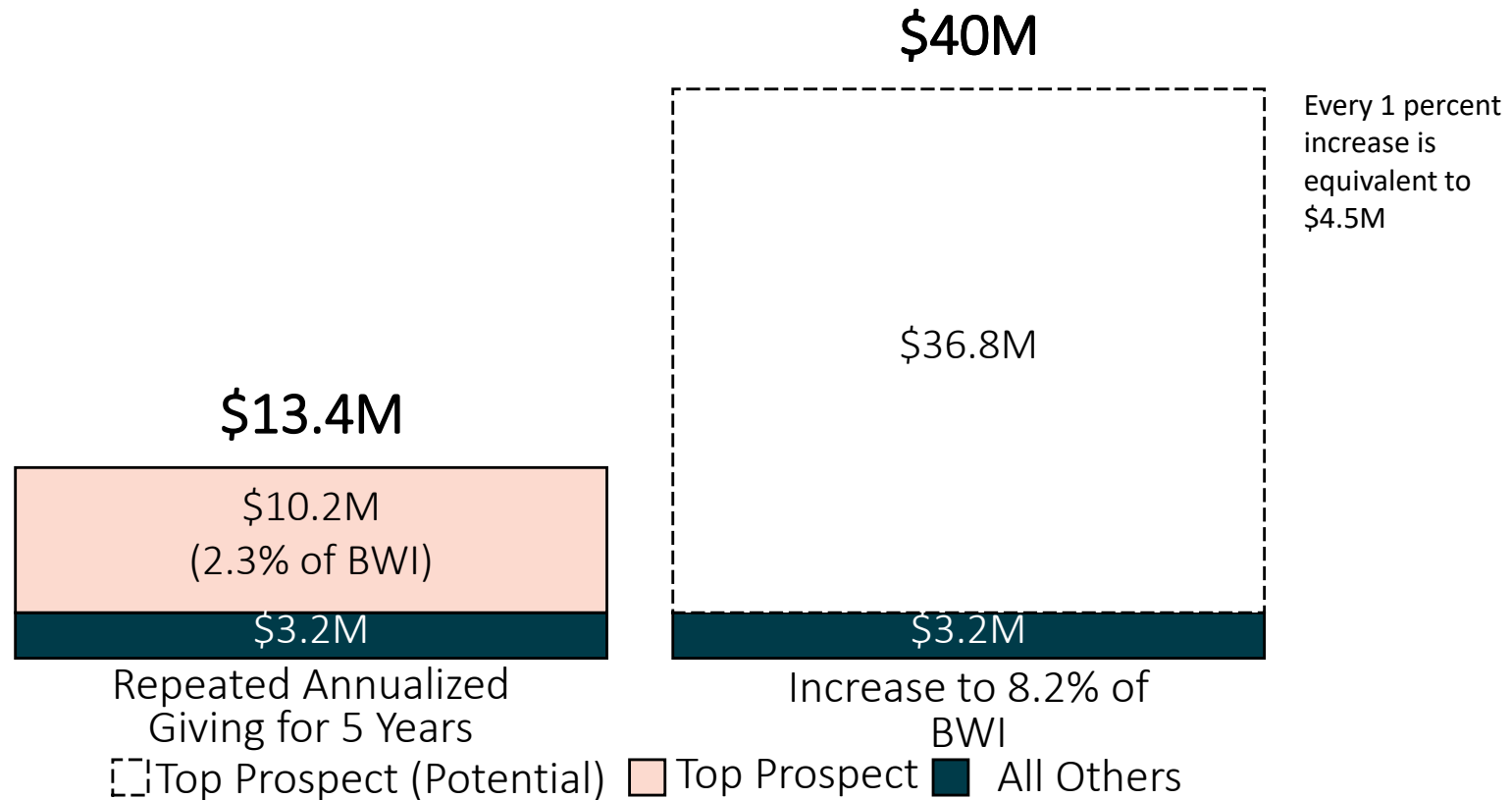
FINDINGS

Campaign Strategy

Campaign Potential

With additional attention from TWC's staff, we assume that Top Prospects will give a greater percentage of their BWI. In the scenario below, we show the increase in giving from Top Prospects that would be necessary for TWC to achieve its campaign goal.

Top Prospects will need to give, on average, 8.2% of BWI for TWC to achieve a \$40M campaign goal.





CAMPAIGN STRATEGY

To be successful, a campaign needs an overarching strategy that details a feasible goal and timeline and articulates the investment necessary.

STRATEGY OVERVIEW

Campbell & Company recommends launching a campaign with an initial focus on the Convening Center capital and programs, with a working goal of \$35M to be secured within five years.

As this campaign achieves predetermined benchmarked momentum, C&C recommends expanding the campaign to more explicitly include "The Wild Center Fund" for facility, program, and endowment goals, and highlight planned giving. The working goal for The Wild Center Fund is anticipated to be \$20M.

RATIONALE OVERVIEW

Our findings indicate that The Wild Center has the right "ingredients" to successfully achieve a \$50M campaign—following an investment in campaign “readiness”.

The initial \$35M campaign will attract new donors and the support needed to build the donor pipeline for this elevated effort.

We recognize that there are donors who are eager and ready for "blended" asks that include support for the Convening Center, as well as The Wild Center Fund – and these donors should be asked for gifts early in the campaign.

STRATEGY RECOMMENDATION & RATIONALE

Move forward with a campaign that is focused on the Convening Center over the course of five years, and prepare for a longer campaign focused on The Wild Center Fund and endowment.

- Our study uncovered **strong enthusiasm for The Wild Center’s mission, leadership, and potential.**
- The capacity analysis demonstrates that **The Wild Center has stakeholders with the ability to support a significant campaign goal (\$50M+).**
- At the same time, **the donor interviews and the current level of giving from this stakeholder group demonstrates that the donor base is not ready for a campaign above \$35M at this point in time.**
- A strong indicator of success is the donor readiness as evidenced by self-identified gifts at, or above, 20% of goal. **With \$6.6M in gifts identified, a goal of \$35M is recommended.** We also want to note that the \$6.6M represents a **small group of Board** members—another indicator of the need to grow the donor pipeline before pursuing a larger goal.
- **The Convening Center is a project that has the potential to attract new donors beyond the region**—including foundation and corporate support—in addition to individuals who will be inspired by the vision and impactful programming. **A focus on identifying and engaging new donors** will be important, and early momentum from current donors will be key to building this pipeline.



STRATEGY RECOMMENDATION & RATIONALE (continued)

Move forward with a campaign that is focused on the Convening Center over the course of five years, and prepare for a longer campaign focused on The Wild Center Fund and endowment.

- The donors we interviewed are believers in The Wild Center's mission and potential. **They are also concerned about the organization's ability to be successful in a significant campaign without growth in the donor pipeline.**
- As a result, there is a risk that they will hold back on their giving until they see momentum. Once new donors are engaged around the Convening Center, we **anticipate that those labeled as "current and future donors" in the capacity analysis will step forward with generous support** of The Wild Center Fund's facility, program, and endowment initiatives.
- Several **key elements of campaign planning** will benefit from this strategy and timeline:
 - Determining appropriate monetary goals for campaign priorities
 - Early execution of "blended" asks that include support for the capital projects along with a planned gift for the endowment
 - Accounting for other campaigns and competing priorities in the region that may result in donor fatigue
 - Building the major gift pipeline through qualification efforts
- These modifications would allow TWC to **focus the initial campaign on capital priorities and extend the timeline for a more focused effort on endowment gifts** from dedicated supporters.



RECOMENDATION

Campaign Strategy

For a \$35 million capital goal, pursue a strategic distribution of gifts informed by the capacity analysis.

\$35M GIFT TABLE

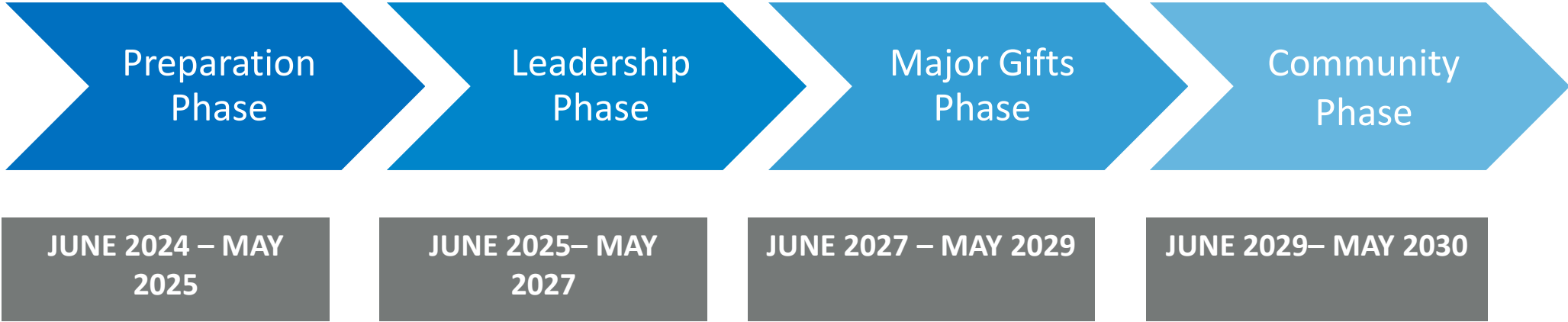
Gift/Pledge Level	Gifts Needed	Qualified Prospects Needed	Subtotal (\$)	Cumulative (%)	Identified Prospects	Surplus (Gap)	Future Prospects
\$5,000,000	2	6	\$ 10,000,000	\$ 10,000,000	14	8	32
\$2,500,000	3	9	\$ 7,500,000	\$ 17,500,000	20	11	22
\$1,000,000	5	15	\$ 5,000,000	\$ 22,500,000	68	53	267
\$500,000	8	24	\$ 4,000,000	\$ 26,500,000	33	9	102
\$250,000	12	36	\$ 3,000,000	\$ 29,500,000	36	0	59
\$100,000	20	60	\$ 2,000,000	\$ 31,500,000	105	45	273
\$50,000	30	90	\$ 1,500,000	\$ 33,000,000	69	(21)	259
\$25,000	40	120	\$ 1,000,000	\$ 34,000,000	93	(27)	605
\$10,000	50	150	\$ 500,000	\$ 34,500,000	81	(69)	694
Less than \$10,000	Many	Many	\$ 500,000	\$ 35,000,000	138		100,929
Total	170	510			657		103,242

RECOMENDATION

Campaign Strategy

Adopt the proposed campaign timeline for a \$35M capital-focused campaign.

\$35M CAPITAL-FOCUSED CAMPAIGN TIMELINE



RECOMMENDATION

Campaign Strategy

Adopt the following structure, key activities, and benchmarks for a \$35M campaign focused on funding the Convening Center.

PREPARATION PHASE

12 months: June 2024 – May 2025

- Refine the campaign case for support based on study recommendations.
- Build out messaging for The Wild Fund that can be used with blended asks and donors who prefer that to the Convening Center.
- Engage and evolve the Campaign Steering Committee (CSC).
- Conduct early leadership gift asks of \$100,000 and above.
- Develop campaign policies and procedures.
- Align staff roles to maximize major gift fundraising and begin to hire recommended staff.
- Offer workshops to staff, Board, and volunteers around campaign messaging, donor identification, and engagement strategies.

Benchmark: Secure 25% of the campaign goal

LEADERSHIP GIFTS PHASE

24 months: June 2025 – May 2027

- Continue to qualify, cultivate, and solicit leadership gift prospects.
- Solicit Board of Directors, Advisory Board, and Campaign Steering Committee members.
- Begin to qualify and cultivate major gift prospects at the \$25,000 level and above.
- Begin outreach to national foundations and corporations.
- Identify donors who are strong candidates for blended asks and begin to implement that strategy.
- Build out the infrastructure for planning giving for the endowment.
- Begin holding small cultivation events.

Benchmark: Secure 60 – 70% of the campaign goal

RECOMMENDATION

Campaign Strategy

Adopt the following structure, key activities, and benchmarks for a \$35M campaign focused on funding the Convening Center.
(continued)

MAJOR GIFTS PHASE

24 months: June 2027 – May 2029

- Solicit all remaining leadership gift donors.
- Qualify, cultivate, and solicit major gift prospects.
- Engage donors who are motivated by the goals of The Wild Center Fund.
- Continue small cultivation events.
- Refine benchmarks and goals for The Wild Center Fund.
- Develop a public communications strategy.
- Begin preparing for community phase.
- Confirm public campaign goal.

Benchmark: Secure 80 – 85% of the campaign goal

COMMUNITY PHASE

12 months: June 2029 – May 2030

- Solicit all remaining leadership gift and major gift donors.
- Solicit gifts from the entire community.
- Communicate the campaign case and messaging broadly using the full range of The Wild Center’s communications channels.
- Thank and steward all leadership and major gift donors.
- Hold campaign celebration events.
- Roll into expanded campaign timeline if needed.

Benchmark: Secure 100% of the campaign goal and celebrate success!



CASE FOR SUPPORT

The campaign's vision and impact must be clear and compelling and communicate a strong rationale for the funding priorities. The philanthropic case must be made for investing in The Wild Center and its vision for the future.

FINDINGS

Case for Support

- Interviewees are supportive of The Wild Center’s **strategic plan and the idea of a campaign.**
- Study participants noted that **climate change is potentially a controversial topic** – while some cautioned TWC around leading with this, others wanted a stronger stance on this area of TWC’s programming and vision.
- The current TWC digital presence is **an opportunity to more clearly tell the compelling story** of what The Wild Center does and what it aims to do.
- Communications are generally **written for a wide audience, rather than tailored for distinct groups.**

“I am really excited about the [campaign’s] ambition. I hope that everyone else can help back the ambition with dollars.”

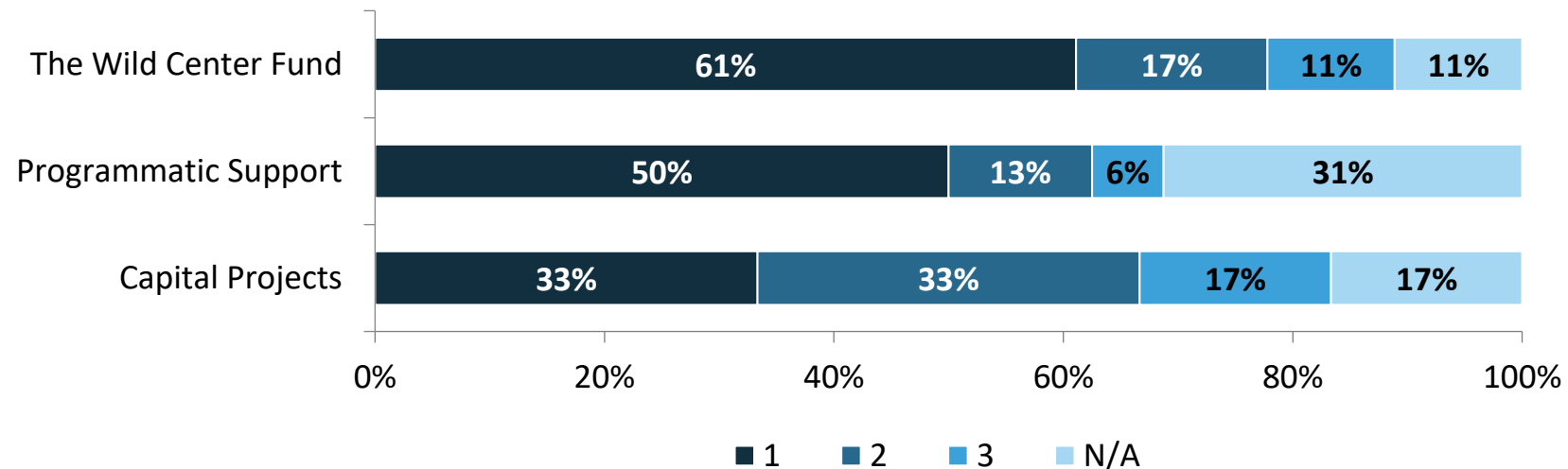
“The Youth Climate piece is an area of personal passion, and an area that could attract large donors.”

“[TWC] might be moving too far in the direction of climate change, to the exclusion of other topics.”

FINDINGS

Case for Support

“Please rank the following proposed campaign priorities with 1 (the top) indicating the priority you feel is most important for advancing The Wild Center’s mission and 3 (the bottom) indicating the priority you feel is least important.”



- Study findings show endowment and annual support, presented as target areas of The Wild Center Fund, resonate strongly with interviewees.
- In general, interviewees believe that **endowment, annual, and capital priorities should be included in the campaign.** However, they believe the future campaign case for support would strongly benefit from greater details on the campaign priorities.

RECOMMENDATION

Case for Support

To capitalize on donor enthusiasm for The Wild Center's programs, create a campaign brand and case for support that clearly connects capital priorities to programmatic growth and impact.

Establish a **clear connection and projected impact on programs for the Convening Center and other capital priorities** included in the first phase of the campaign.

- For example, reframe maintenance and upkeep costs as necessary to maintain the quality of programming, and creation of the Convening Center as necessary for ongoing growth of high-impact programs.

The idea is great, but it doesn't have a deep enough strategy around it. What will it do for the Youth Summit? [How will it be] truly impactful? It needs to be fleshed out and then it could be great."

"I'm not sure what 'Convening Center' means...but space is needed for expanded programming. They're making great use of their existing facilities and are tapped out."

"With the Convening Center, they would be able to offer more workshops and programs for kids and families, and activities they can't do because of lack of space."

"A larger space for programs is important...and could grow and expand partnerships and internships and deepen understanding of The Wild Center."



RECOMMENDATION

Case for Support

Use donor segments and personas to implement a tailored, personalized approach to donor communications.

- In our work, we discovered **these key audiences** who The Wild Center can engage at the major gift level:
 - Local year-round residents
 - Summer population
 - People involved in programming who live outside the area
 - Current and recently lapsed donors
 - Linda Vaughan Society members and prospects
 - People who connect to the mission but aren't familiar with TWC itself
- As a part of continued case development and communication work, complement core messaging about The Wild Center's mission and plans with language and giving opportunities that **speak in a more personalized way to individual donor interests**:
 - Develop segments and/or personas based on the key audiences identified.
 - Prioritize materials that support personalization: slides, microsites, inserts, etc.
 - As The Wild Center moves toward a community phase and works to build its donor pipeline, use personas as a critical tool to assist with communications strategy and planning as well as cross-team collaboration.



RECOMMENDATION

Case for Support

Ensure that the case for support speaks to donors who value The Wild Center's local, place-based value proposition *and* those who are more motivated by broader issues such as climate change.

- Craft messaging that allows TWC to **speak to various donor subsets in ways that stay true to the core TWC vision but are tailored to their audiences.** For example, different approaches to messaging may include:
 - Focusing on the bigger picture of how TWC can interest and benefit the world outside of the Adirondacks, and appeal to people who may not have a connection to its physical location.
 - Speaking directly about climate change in a way that brings people in rather than leaving them out, and tying this into the Adirondacks' status as a unique natural laboratory with an important history of interconnection between nature and humans.
 - Emphasizing the benefits TWC provides (educational, economic, inspirational, etc.) to its Adirondacks home.
- Point to the **impacts of specific programs that may appeal to different types of donors.** For example:
 - TWC's relationship with local schools
 - The on-campus animal ambassadors and exhibits
 - The global footprint of the Youth Climate Program
 - The Convening Center's potential to level up programming for both locals and visitors



RECOMMENDATION

Case for Support

Building upon TWC's success with community donors in the previous campaign, plan for a robust Community Phase to engage even more community support.

Based on the high level of community support for the last effort, and The Wild Center's ongoing need to build awareness and the pipeline for future major gifts, we recommend a case development and communications planning process that positions The Wild Center for a robust, successful community phase.

- **Near term:**
 - In immediate case development work, prioritize community voices through inclusive methods such as focus groups.
 - Create a compelling campaign brand, messaging, and collateral to support donor engagement for campaign cultivation and asks.
- **Mid-term:**
 - Throughout the quiet phase of the effort, prioritize communications that are cultivation and impact focused, as well as engagement opportunities that deepen engagement without a "hard ask."
 - Begin the process of refreshing TWC's website to effectively and consistently share the case for support digitally ([see detailed recommendation in donor engagement section](#)).
- **Long term:**
 - During the Community Phase, strive for maximum participation and maximum visibility by prioritizing channels, messages, and events that ask and thank the broadest group of constituents. We recommend that planning for the Community Phase begin approximately 12 months before The Wild Center is ready for an official launch.





LEADERSHIP

A campaign requires visible leaders willing to champion the effort, make connections, solicit gifts, and advise on strategy. Leadership comes from top staff and Board members, augmented by others committed to the campaign.

FINDINGS

Leadership

- The leadership staff, specifically **Executive Director Stephanie Ratcliffe and Deputy Director Hillarie Logan-Dechene, are well respected.**
 - Interviewees particularly admire **Stephanie’s vision for the future and her ability to adapt and weather changes.**
 - Participants shared that **Hillarie is a tremendous relationship builder** – both as a fundraiser and as a staff manager.
- Some study participants expressed an awareness of the eventual need for transition and asked **about succession planning.**

“Stephanie and Hillarie are remarkable and tireless and relentless...they’ve done miracles.”

“Is there a succession plan? [The TWC team is] so devoted but they need to prepare for the next generation.”

“If you talk to Stephanie and don’t walk away [inspired], you probably haven’t really talked to her. She’s incredible.”

“It’s already a lifestyle to live up there...hard to attract people. Finding another Stephanie and Hillarie would be very hard.”

FINDINGS

Leadership

- Participants have **tremendous confidence in the volunteer leadership of Campaign Co-Chairs Lynn Fox and Lee Bailey, and Board Chair Karen Thomas.**
 - **Lynn and Lee are trusted to run a successful campaign,** and many noted their strong relationships with constituents and the community.
 - **Karen is a respected Board Chair,** both well liked and admired for her resolve.
- While study participants shared reverence for the founding volunteer leadership, they also see **an opportunity to evolve and define the present Board.**
 - Several interviewees reflected on the visionary leadership of Obie Clifford, while looking forward to the unique value current and future leaders can bring to The Wild Center.
- **Building and maintaining relationships can be challenging** for a Board comprised of those with a local focus but less connections as the demographics of the area change.
- The Board **participates in fundraising efforts** through The Wild Center’s “Take Five” initiative – soliciting renewals and extending stewardship efforts to a personal list of donors.

“Karen has amazing experience and runs a really great program for the Board.”

“I trust Lee and Lynn completely.”

“Obie was amazing and attracted a lot of the original support...but the Board and staff are dedicated and doing a great job.”

FINDINGS

Leadership

- **Most current Board members are Prospects** (72% of current Board members), many of which have \$100K+ capacity (54% of current Board members). The breakdown can be seen below.

Board Giving

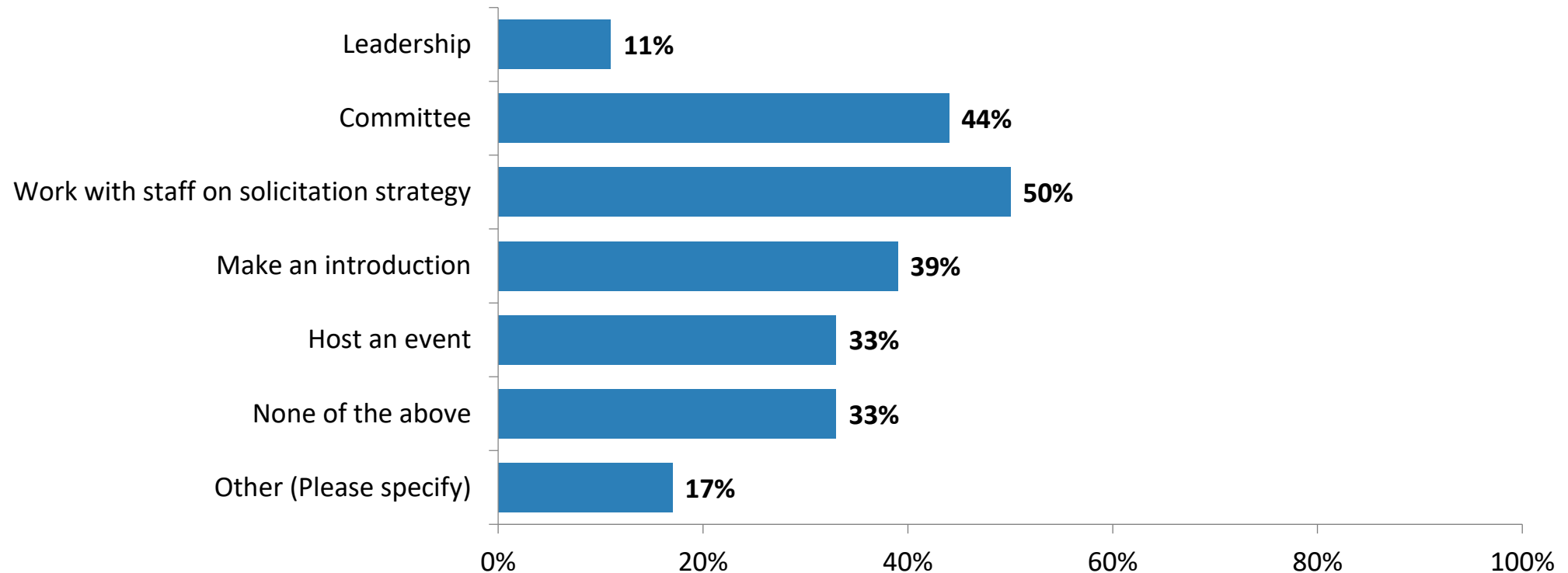
Board	\$100K+ Prospects	<\$100K Prospects	\$100K+ Future Prospects	<\$100K Future Prospects
Advisory Board Member	14	4	2	12
Trustee	14	12	1	1
Emeritus Trustee	3	0	1	0
Total	29*	15*	4	13

* Constituents within the same household are on multiple TWC Boards

FINDINGS

Leadership

“How do you see your own level of involvement in this campaign?”



- Many study participants indicated their **willingness to donate their time and talents to the campaign**. Notably, half of respondents were willing to work with staff to develop prospect strategies and 44% shared their interest in joining a campaign committee.

RECOMMENDATION

Leadership

Position Stephanie Ratcliffe as the face of the campaign, with support from staff and volunteer leadership.

- Leverage the respect people have for Stephanie to **place her as the face of the campaign and shift her role** more toward fundraising and campaign duties.
 - Ideally, Stephanie will spend **30% of her time on the campaign**, both fundraising for major gifts and serving as a central point of knowledge and campaign vision.
 - Stephanie's **campaign responsibilities** will include:
 - Developing and sharing a vision for TWC's future to develop an inspiring campaign case
 - Communicating a sense of urgency and need for the campaign priorities
 - Coordinating with the Board and committees on campaign activities and investments
 - Building and reinforcing a culture of philanthropy around TWC
 - Cultivating and soliciting key leadership prospects in partnership with other key staff
 - Elevating, advocating for, and supporting Hillarie's work as Campaign Director
- Strategize how Stephanie can **delegate some current duties to make time for the campaign** and equip the staff to take these on during the campaign and potentially after.



RECOMMENDATION

Leadership

Position Hillarie Logan-Dechene as Campaign Director.

- Elevate Hillarie's role to **Deputy Director and Campaign Director**, and transition some of the relationships Stephanie manages to Hillarie.
- **Campaign responsibilities** include:
 - Spending 45% of time on major gifts and campaign efforts
 - Managing a portfolio of 35-50 leadership and major gift prospects
 - Developing a campaign strategy and coordinating the Development team's campaign efforts
 - Supporting Stephanie in her campaign-related duties
 - Facilitating Campaign Steering Committee meetings and coordinating volunteer assignments
 - Monitoring campaign progress and reporting to the Campaign Steering Committee and Board
 - Serving as a spokesperson and ambassador for the campaign in a variety of contexts

See [Appendix B](#) for full Campaign Director role description.



RECOMMENDATION

Leadership

Officially launch a Campaign Steering Committee to provide volunteer leadership for the campaign.

- The Campaign Steering Committee will be the primary volunteer entity governing campaign strategy and execution, with a critical role in building community consensus, ownership, and investment in the campaign.
- Leadership:
 - As The Wild Center has **already recruited Lee Bailey and Lynn Fox to serve as Co-Chairs**, leverage their relationships and networks to identify and recruit others with essential community perspectives and a willingness to participate actively in fundraising.
- Membership should include:
 - 8-10 volunteer leaders with **giving and fundraising capacity**
 - Representation from a range of constituencies:
 - Recruit **philanthropic leaders** capable of making leadership gifts that set a high standard of giving for other prospects of similar capacity.
 - Follow-up with individuals who **shared campaign leadership interest during the study**.
 - Include (but do not limit membership to) **Board members**.
 - Seek representation of multiple donor and community perspectives and **give TWC reach and connections** to prospective significant donors.
 - Prioritize a **meaningful diversity** of backgrounds and perspectives.



RECOMMENDATION

Leadership

Assemble a Campaign Steering Committee to provide volunteer leadership for the campaign. (continued)

- Roles of the Campaign Steering Committee*:
 - Make gifts at **personally significant levels that set a high standard** for other prospects.
 - **Advise** on campaign and donor-specific strategies.
 - Help **identify, qualify, and open doors** to prospects.
 - Play active roles in the **cultivation and solicitation** of campaign gifts, with appropriate staff support.
 - Serve as **spokespersons and champions** for the campaign in their personal networks.
 - **Liaise with and report to the Board** throughout the campaign.
- Staff Support
 - Campaign Director Hillarie Logan-Dechene will **provide primary support** to Committee members in their roles.
 - **Training and coaching will be essential** to support members in active fundraising.

*See [Appendix C](#) for full Campaign Steering Committee member role description.



RECOMMENDATION

Leadership

Grow the partnerships between staff leadership and Board members to craft and implement solicitations.

- **Secure 100% Board participation through personal stretch gifts including planned gifts.**
 - The Board serves as important credentials and connector, and early investment in the campaign helps build momentum.
- **Staff and Board coordination and collaboration is key.**
 - Board leadership through this initiative will signal confidence and excitement in the planning process and campaign to The Wild Center's larger community.
- While 100% participation is important, **giving is not the only way for Board members to indicate their support** and help drive early campaign momentum:
 - Encourage Board participation on and leadership of key giving task forces or committees.
 - Seek opportunities to help Board members leverage their networks in support of the campaign.
 - Consider asking key members to help own and lead specific project-based focused efforts about aspects of the campaign



RECOMMENDATION

Leadership

Clarify and differentiate the various roles and responsibilities of volunteer leaders related to the campaign to maximize the input of all Board and Committee members.

- Establish **written role descriptions**, with tactical activities included.
- Include **regular prospect strategy meetings** that are structured by staff and where Board and staff can review lists of potential donors to discuss engagement strategy and advance next steps.
- Implement frequent "**practice**" sessions with activities such as role playing and messaging that helps illustrate how to recognize, engage and steward donors.
- As a strategy to continue to add new Board members, and build out and implement a focused donor strategy—**consider including ad-hoc members** with specific networks and connections that can include:
 - Mega donors
 - Corporate connections
 - Foundation connections
 - Donors in specific geographic regions
 - Donors connected through industry and businesses
- The Wild Center **may elect to establish formal sub-committees** under the Campaign Steering Committee.





DONOR ENGAGEMENT

At all stages of the campaign, a commitment to relationship-based, donor-centered fundraising is essential. A strong base of donors must be ready to engage in and support the effort with leadership gifts.

FINDINGS

Donor Engagement

- The Wild Center’s programming reaches many audiences at different levels, and they will likely require **tailored cultivation strategies** to effectively engage the necessary pipeline of donors.
 - The Wild Center has current annual and mid-level donors, members, and planned giving donors who fall below the threshold for the "top prospect" ranking and deserve attention.
- Donor **events can evolve to be stronger vehicles** to lay the groundwork for cultivation and asks.
 - Historically, TWC has not focused its time or resources on establishing an event fundraising program.
 - Investment of resources and time may be required to implement an asset-based approach to donor events
There is opportunity to leverage volunteers to host gatherings at their homes or use already established programming for donor cultivation.
- Study participants expressed **concerns that longtime TWC donors may be tapped out or feeling donor fatigue**, and several are hopeful that as-yet-unidentified major donors may be key to campaign success.
 - Many long-time donors have supported The Wild Center since the beginning. While still supportive of TWC’s mission, longstanding donors are looking to pass the baton to a new generation of supporters.

“Every day we get asked for money in the mail...how you approach people is so important.”

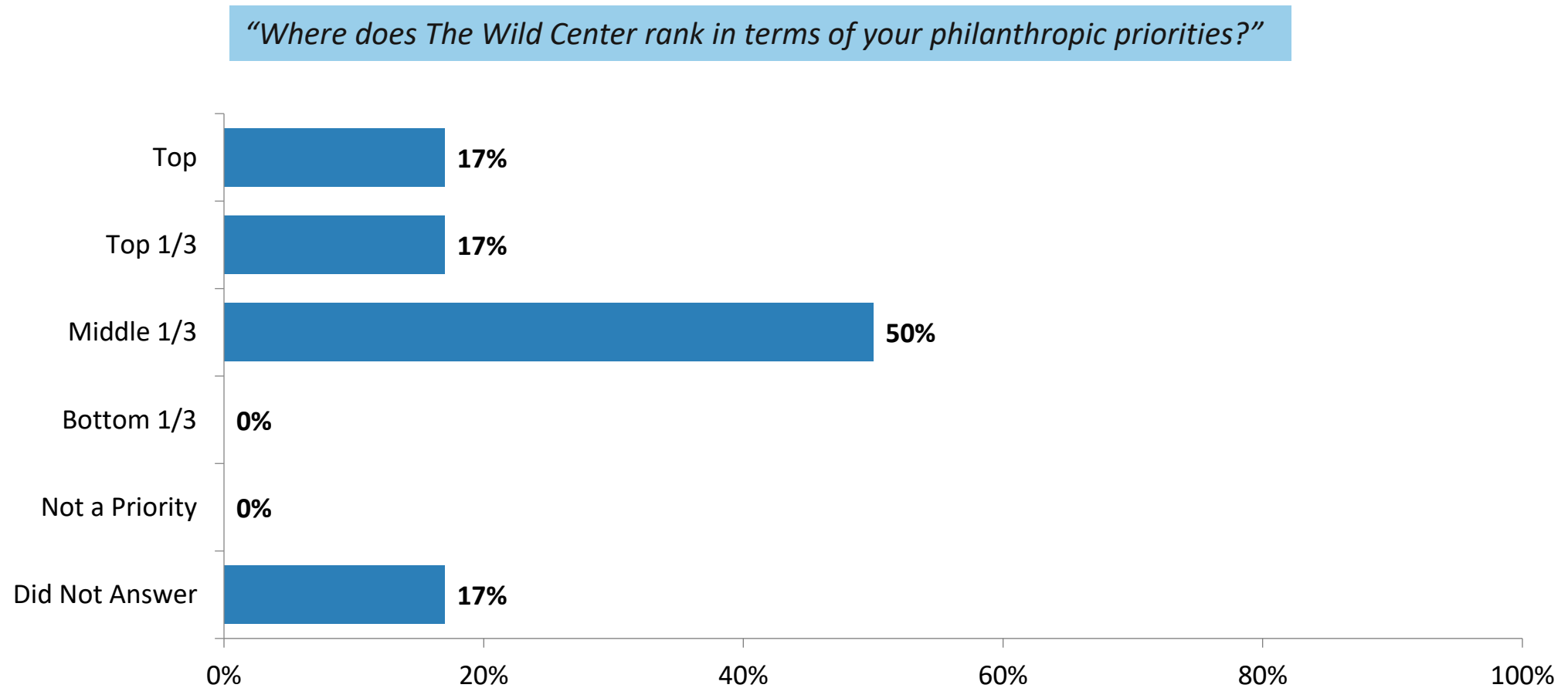
“[TWC] has only done small events...this could be something we’re missing right now, and [bigger] events give people something to look forward to.”

“There’s potential that there’s some big money out there. Who are the celebrities that go to climate summits? Go to Al Gore.”

FINDINGS

Donor Engagement

- A third of study participants ranked The Wild Center in their **top three philanthropic priorities**. Half of all participants ranked The Wild Center in the middle of their philanthropic priorities.

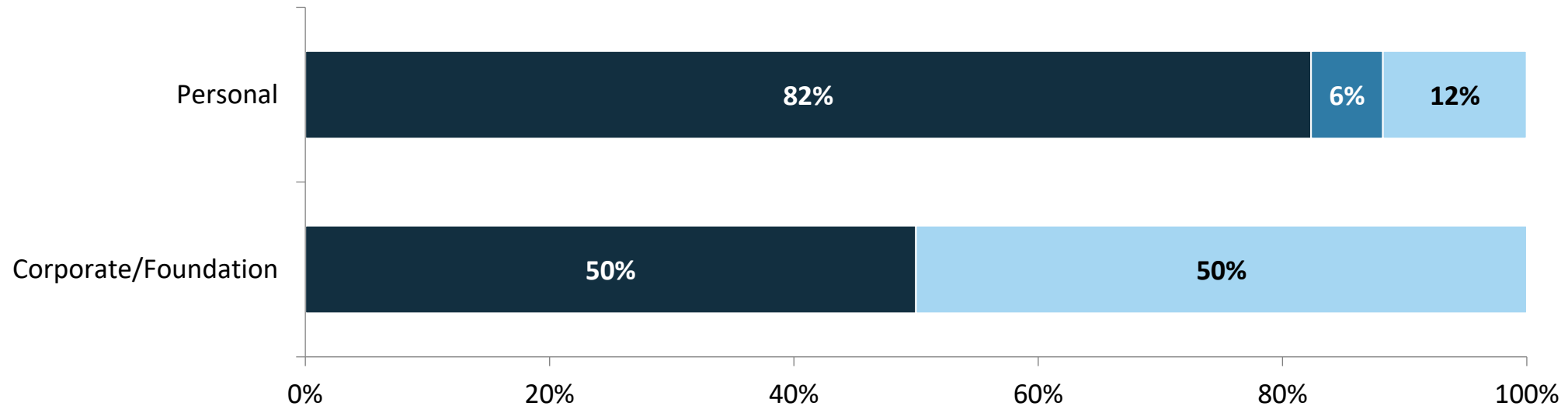


FINDINGS

Donor Engagement

- The majority of participants **82% indicated that they would personally contribute** to The Wild Center's campaign.
- While the data shows 50% individuals shared that their corporation or foundation would donate to the campaign, this data may be misleading, as only two individuals answered this question.

"While we are not asking you for a commitment at this time, if The Wild Center were to ask you for a gift or pledge today, would you and/or your company/foundation support the campaign above and beyond what you typically donate in a given year?"



Personal: n = 17

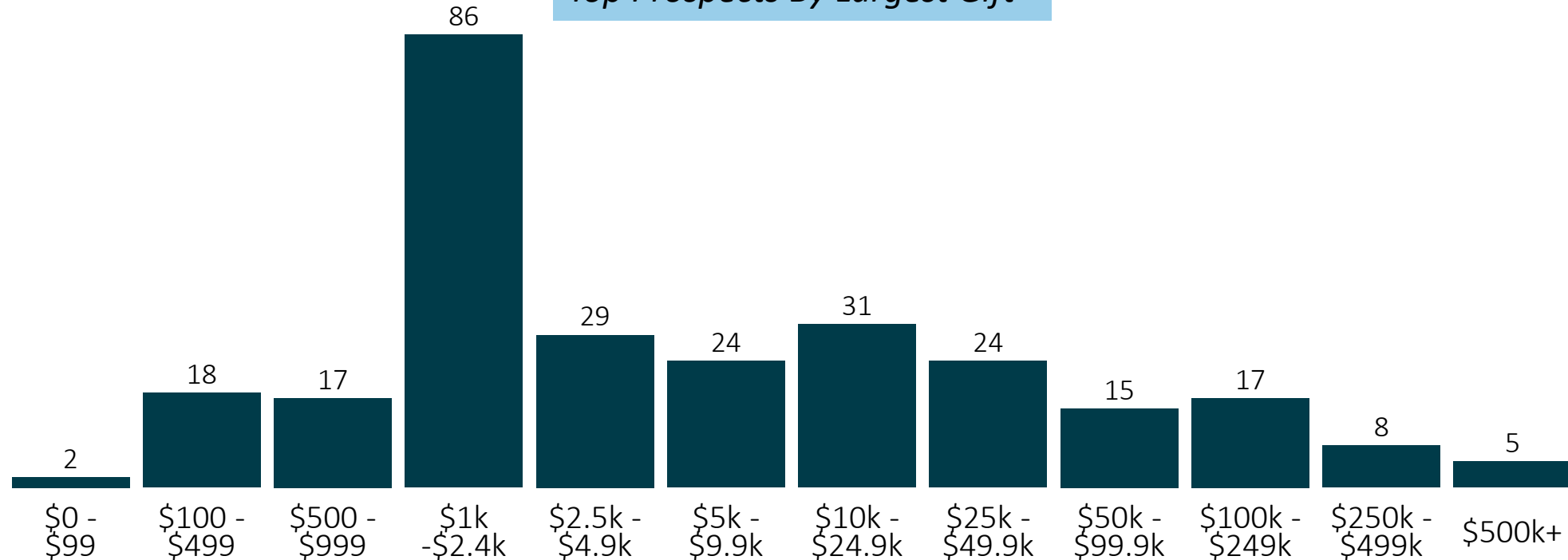
Corporate/Foundation: n = 2

■ Yes ■ No ■ Don't know / Can't answer

FINDINGS

Donor Engagement

Top Prospects By Largest Gift

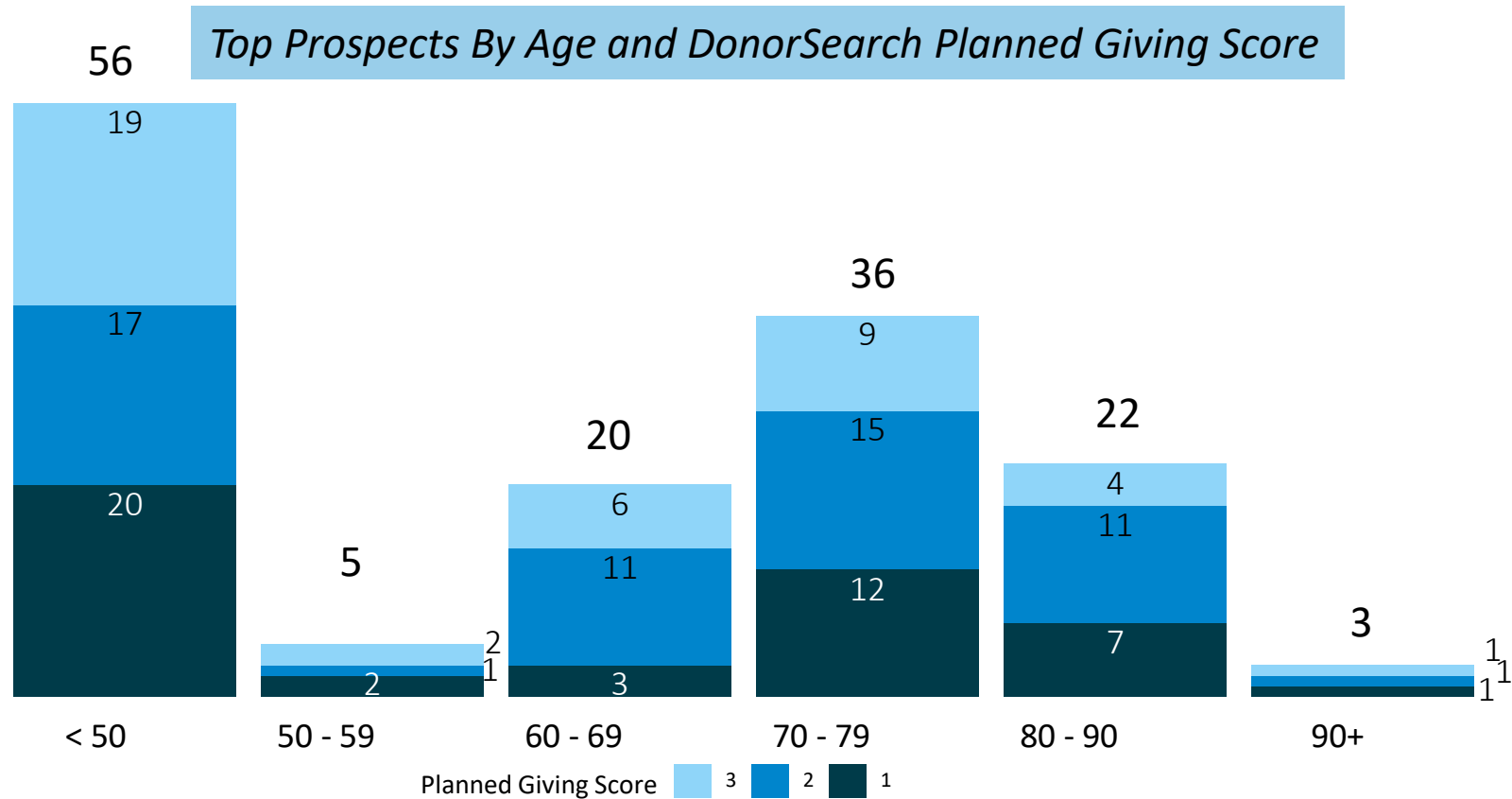


- **Most Top Prospects are not giving commensurate with their capacity.** This marks a significant opportunity to increase giving.
- 55% of Top Prospects have not given a gift of \$5,000 or more, and 75% have not given a gift of \$25,000 or more.

FINDINGS

Donor Engagement

- 24 Top Prospects are already part of The Wild Center's planned giving program, the Linda Vaughan Society.
- There may be a great deal of **untapped potential for planned giving**, as 142 Top Prospects with \$248M in capacity were rated with a PG ID score of 1-3*.



* A PG ID score of 1-3 is considered a good planned gift prospect. Lower scores indicate better planned giving prospects. Scores are based on giving history and not on age.

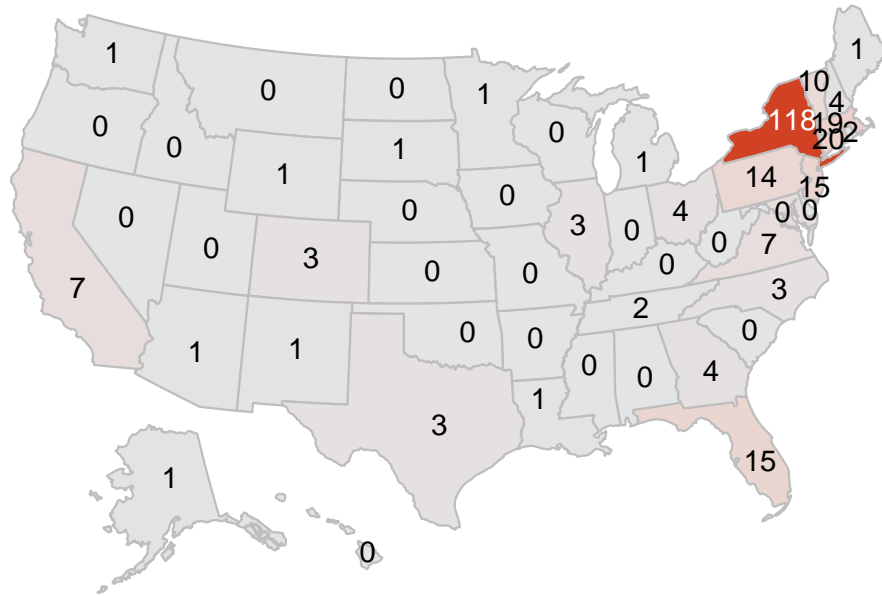


FINDINGS

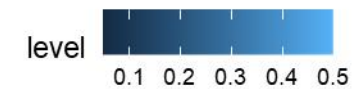
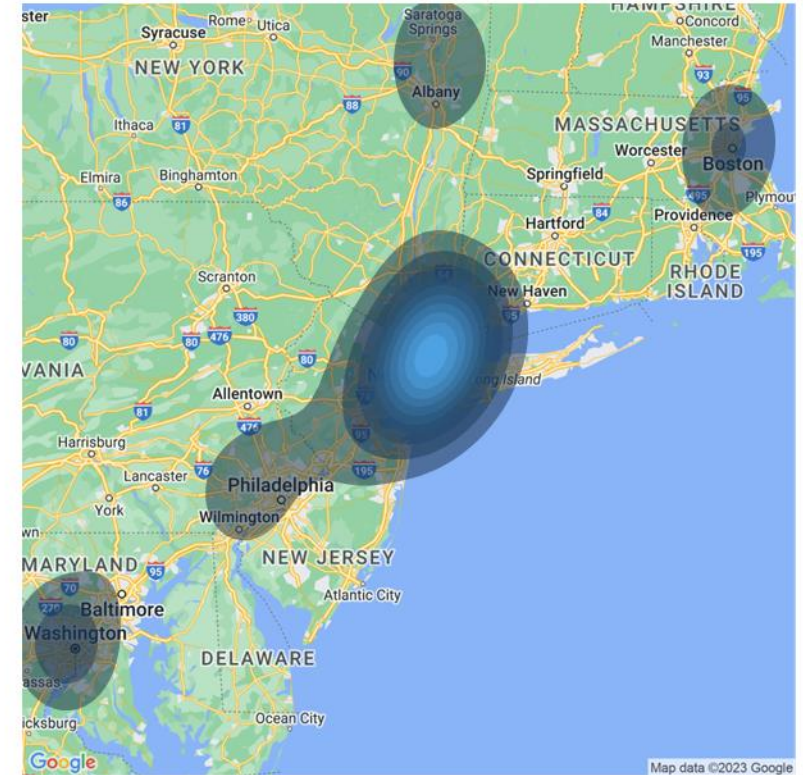
Donor Engagement

Top Prospects by Primary Home Address

- 42.8% of Top Prospects live in NY, which represents 42.6% of capacity.



- Top Prospects are geographically dispersed** and can be found in the states above.
- Due to The Wild Center's location, many donors and prospects currently do not have a year-round relationship with TWC, which limits fundraising possibilities outside of the summer months.

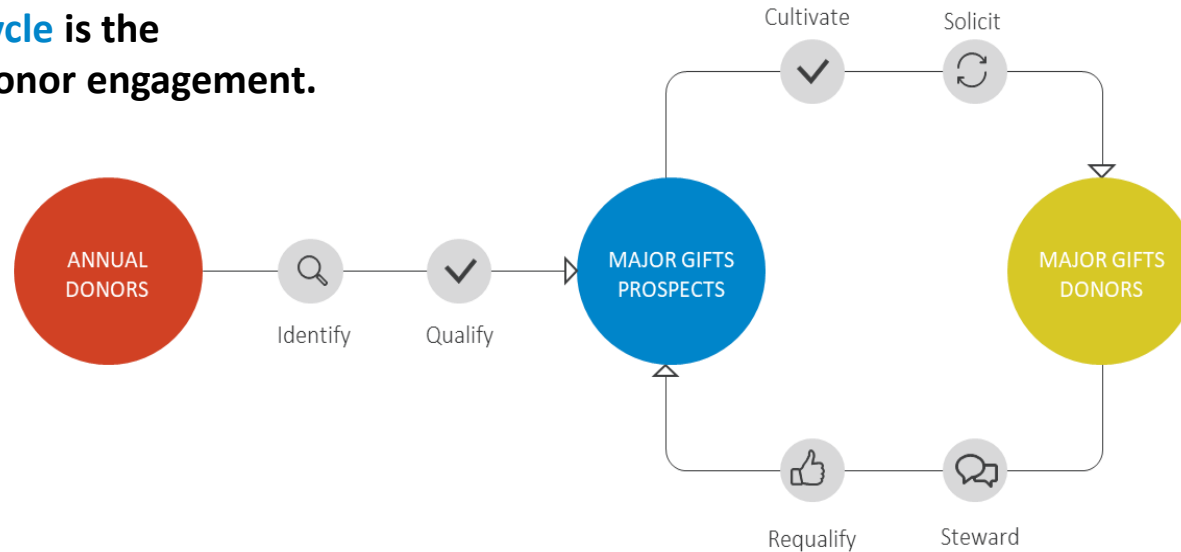


RECOMMENDATION

Donor Engagement

Structure all leadership and major donor engagement around the relationship management cycle.

The **relationship management cycle** is the foundation for systemic major donor engagement.



- **Identifying potential donors** who may have the capacity to make major gifts.
- **Qualifying these prospects** to determine whether they have the propensity to support The Wild Center at a major gift level (\$25k+).
- **Cultivating prospects** through personal outreach and donor-centered strategies.

- **Soliciting gifts for specific amounts** and specific purposes that reflect The Wild Center's cultivation strategy and represent personally significant or stretch commitments.
- **Stewarding donors** through continued personal interaction that demonstrates the impact of their gifts and ultimately prepares them to make subsequent gifts.



RECOMMENDATION

Donor Engagement

**Structure all leadership and major donor engagement around the relationship management cycle.
(continued)**

- **Identification:** Identify a universe of potential donors who may have the capacity and propensity to make major outright and/or planned gifts. This will include, among other tactics, drawing on the results of the capacity analysis, researching and analyzing annual donors, and holding active sourcing discussions with Board and campaign leaders.
- **Qualification:** Further refine the list of prospective campaign donors to **prioritize those most-promising for cultivation**. This includes reviewing lists with select volunteers and using early engagement (including small events) to identify legitimate major gift prospects for active cultivation.
- **Cultivation:** Develop and implement individualized cultivation plans for each prospect; include a designated cultivation team (staff and volunteers) and a strategy for engaging the prospect through multiple individual contacts. Document each strategy in The Wild Center's donor database.
- **Solicitation:** Use a combination of staff and volunteer leadership to **solicit each prospect** (as they are ready, following substantive cultivation) for a specific amount with a specific purpose.
- **Stewardship:** Sustain the relationship with each donor through enthusiastic recognition, continued contacts and engagement, and reporting on their gifts' impact. Ensure stewardship is highly personalized and aim to sustain deep engagement over time and opportunities to secure additional major gifts in the future.



RECOMMENDATION

Donor Engagement

Begin qualification of Top Prospects immediately.

Maintain a focus on qualification of Future Prospects throughout the life of the capital campaign.

- Dedicate focus and resources to implementing a **formalized prospect qualification process**.
- Qualification is essential to fundraising success and is a priority during campaign planning and preparation, determining the depth and penetration of the campaign pipeline and identifying and prioritizing prospects for a major gift solicitation during the campaign.
- While the qualification process should be focused on one-on-one visits and calls to deepen relationships (see following slide), other strategies such as peer screenings and a discovery survey can be employed to strengthen the outcomes and reach.

Key Activities to Qualify Prospects

Peer Screening

→ Holding sessions with Board members, TWC leadership, and other volunteers to identify prospective major donors

Prospect Research

→ Obtaining additional insights into giving capacities, leveraging wealth screenings, and developing research briefs and profiles of prospects

Discovery Survey

→ Distributing regular surveys to assess prospects' interests, priorities, and propensity to give to The Wild Center

Qualification Visits & Calls

→ Conducting calls and visits to promising prospects to connect one-on-one with donors and understand their motivations to give

Relationship Management Meetings

→ Scheduling regular meetings among staff and volunteer leaders to review progress with prospects, discuss cultivation strategies, and plan next steps



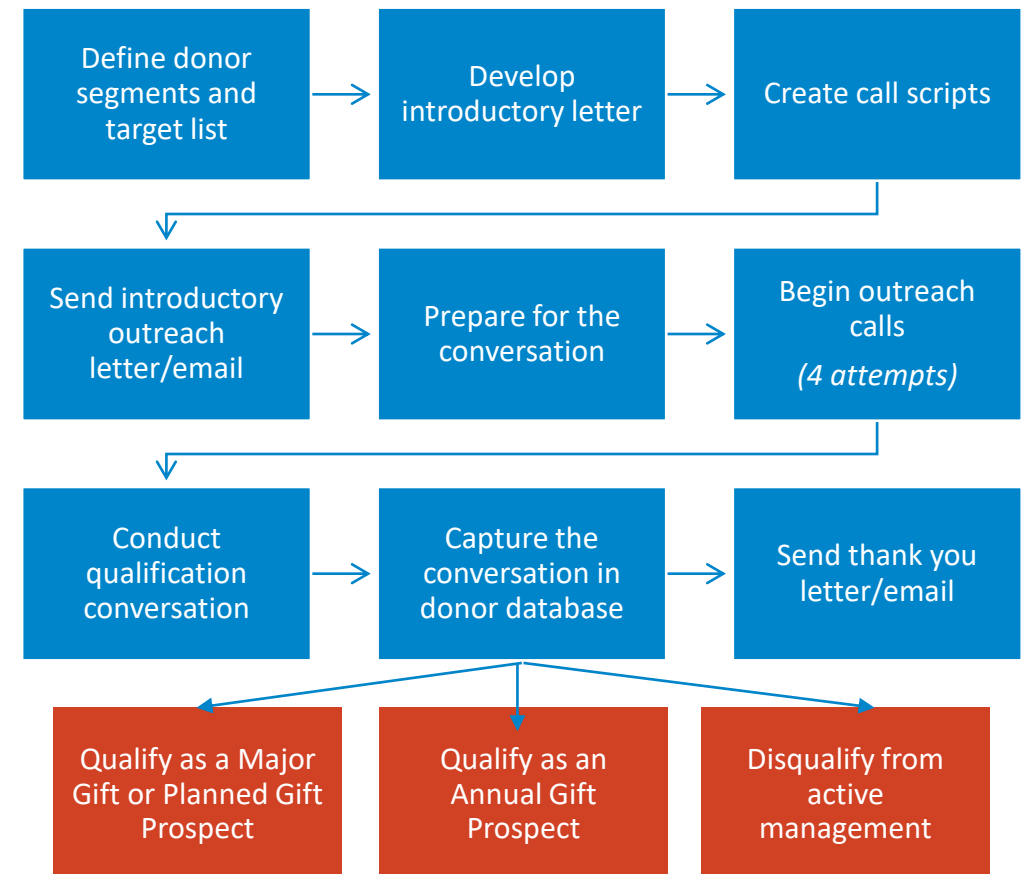
RECOMMENDATION

Donor Engagement

Begin qualification of Top Prospects immediately.

**Maintain a focus on qualification of Future Prospects throughout the life of the capital campaign.
(continued)**

- The purpose of a qualification conversation, specifically, is to assess whether a donor has the capacity or inclination to increase their giving to TWC. Qualification conversations are not solicitations. The conversation is intentionally designed to understand linkages and evaluate affinity and capacity.
 - Staff should **prioritize qualifying Top Prospects** who are not assigned to a portfolio and **have given \$1,000+**.
 - The **second group to prioritize are Top Prospects** who have given at a lower level – **between \$250-999**.
- The recommended process for qualification includes the following steps displayed on the diagram to the right.
 - As the campaign progresses, TWC staff should **qualify Future Prospects** in efforts to support major gift pipeline building.



RECOMMENDATION

Donor Engagement

Continue to develop place-based cultivation strategies during the summer months that can extend into year-round relationships.

- Plan events that **lay the groundwork for donor engagement** and assign Board members to follow up.
- Reach the summer population when they are in the Adirondacks and **strategize how to continue those relationships throughout the year** via engagements in other locations.
- **Build in a year-round messaging for the Convening Center** that elevates it from just a building they might see in the summer to an evergreen base for a variety of programming. Include descriptions of opportunities for local residents to come onsite, such as to have coffee and enjoy the space.



RECOMMENDATION

Donor Engagement

Leverage The Wild Center's science-based programming to introduce and engage The Wild Center's vision to new stakeholders at a national level.

- As demonstrated through the energy and interest around programming such as the Youth Climate Summit, The Wild Center **is positioning itself to be a leader in leveraging science and experience-based learning that promotes a deep understanding of how to take action that leads to change.** This position can attract supporters and participants that will be important to the success of this campaign.
- **Science-based programming that is designed to motivate long-term action** has appeal and relevance with audiences far beyond Tupper Lake. This programming will be a key towards engaging high-capacity individuals, foundations, and corporations.
- The Wild Center's **vision can attract and engage stakeholders who are interested in conservation and global sustainability** by demonstrating that the programming can serve as a model and as an illustrative example for key concepts.
- The **Net Zero goals** for the Convening Center can be leveraged to draw in organizational leaders nationally and internationally.



RECOMMENDATION

Donor Engagement

Engage large national foundations and corporate funders that will be attracted to The Wild Center's broad, impactful programming.

- **Build a focused and robust foundation strategy that includes the engagement of individuals connected to these foundations as donors, staff, and Board members.**
 - Large national foundations seek models and programs that make deep impact and can be scaled up. Using tools such as Foundation Search, along with review of similar organizations, build a broad list of potential funders and begin qualifying them.
- **Build a corporate engagement strategy that is tailored the business needs and interests of large corporations.**
 - Leverage connections through the Board, donors, and other stakeholders, including national corporations that have business interests that benefit from investments in environmental and conservation programming, in the regular prospect strategy development.
 - Ensure that gift acceptances policies include opportunities for The Wild Center's staff and Board to be very deliberate around the nature and business interests of corporate sponsorships/investments that would be accepted by the organization.
 - Develop a donor recognition structure that takes into consideration the needs and interests of corporations, along with the culture and risk tolerance of The Wild Center.



RECOMMENDATION

Donor Engagement

Consider blended gift solicitation strategies to support campaign priorities.

- A **blended gift solicitation** (also known as a joint ask, double/triple ask, or a dual solicitation) is a solicitation strategy that combines any two (or all three) of the following into one solicitation.



- To accomplish the outlined Campaign fundraising goals, The Wild Center should **strategically identify and solicit potential blended ask donors** to maximize philanthropic impact. Indicators include:
 - Prospects who are giving below their capacity
 - Top Prospects who have an established relationship with The Wild Center
 - Consistent Annual Fund Donors
 - Planned Giving Prospects
 - Current and Former Board of Directors or Advisory Board Members



RECOMMENDATION

Donor Engagement

Create and execute an elevated and comprehensive donor stewardship strategy for campaign-level giving.

- Implement **impact-focused stewardship strategies** that encourage donors to notice and celebrate growth of programs, new offerings, etc. in donor-facing communications.
- Develop **processes and materials** for sharing gratitude with supporters at different giving levels, including:
 - **Impact reports** that update supporters on a quarterly basis about how their investments are strengthening TWC and the community
 - **Email updates** that share anecdotes and facts about achievements made possible by donors
 - **Greeting cards** that highlight giving anniversaries, birthdays, or major holidays
 - **Public acknowledgement** that celebrates the collective impact of philanthropic contributions
 - **Events recognizing supporters** and giving them special access or previews of future campaign phases
 - **Small thank you gifts**, such as branded accessories
- Apply **specific stewardship approaches to donor subsets** identified by organizing prospects based on their relationship to TWC. For example, TWC might:
 - **Express appreciation for consistent and longstanding donor involvement** by extending invitations to exclusive events, and by incorporating communication that raises the donors' sights to visionary possibilities for TWC and acknowledges their support.
 - **Build community among seasonal donors** by inviting them to stewardship events and volunteer activities that allow them to build connection with one another and with TWC.
 - **Engage non-local donors** with virtual offerings, digital communications, or events held outside of the Adirondacks region.

**See [Appendix D](#) for more information about types of stewardship.*



RECOMMENDATION

Donor Engagement

Create a menu of naming opportunities at all levels to encourage donors to make stretch gift commitments.

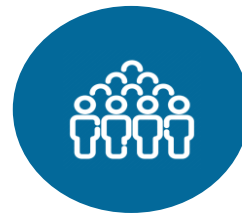
- Several interviewees mentioned that **naming opportunities would be compelling for others**. Once the list of campaign projects is finalized at the end of the preparation phase, The Wild Center should create a menu of potential naming opportunities—with associated gift amounts—to raise donors' sights, leveraging the following criteria:
 - Square footage and cost per square foot
 - Visibility
 - Appeal
 - Relationship to the other physical named recognition opportunities available (or previously named)
 - Relationship to the campaign's gift table
- Additionally, TWC could **consider adopting community-centric practices** when developing their naming opportunities:



Cumulative gifts or duration of giving rather than specific amount



Acknowledging non-financial contributions, such as time and passion



Recognition Designed by the community or tells a story



Naming selection rights from a list created by the organization



Preserving community spaces by not allowing them to be named



RECOMMENDATION

Donor Engagement

Evaluate The Wild Center's capabilities, channels, and strategies for donor giving and digital donor engagement, with a focus on providing high-impact engagement opportunities and supporting a higher level of online giving during the Community Phase and beyond.

- Given the noted limitations of TWC's geography and the critical importance of building the donor pipeline, we recommend a **purposeful evaluation of and strategy development around engaging donors remotely through digital means.**
- **Invest in a website refresh** that can serve as a donor engagement tool. Consider a "microsite" for the campaign that can be easily updated and exists on a URL that can be shared with specific prospective donors.
- To prepare for and support a **higher level of digital giving, cultivate a frictionless giving experience** on the TWC website's donation page.
 - Minimize the number of clicks needed to get from any page on your website to the donation page (no more than two).
 - Add a digital wallet or at least one non-credit card option (PayPal, Google Wallet, Apple Pay, etc.) if not already present.
 - Automatically redirect donors to a page that thanks them for their support.
 - Offer immediate stewardship options that could include opportunities to read more about specific initiatives, give through volunteering or in-kind gifts, etc.



RECOMMENDATION

Donor Engagement

Keep donors and study participants informed about and engaged in campaign details and progress.

- **Follow up with study participants and encourage them to stay involved** in the campaign.
 - Share the Executive Summary of the study and talk about next steps and how they fit in, potentially as ambassadors, advocates, connectors, etc.
 - Explore opportunities for continued involvement; this may include participation on the campaign committee, 1:1 work with staff to help engage a small portfolio of campaign prospects, and/or hosting or co-hosting a small group cultivation event.
- Continue to **cultivate donors and help them to develop deeper connections** with the organization. Cultivation strategies may include:
 - 1:1 visits with Stephanie, Hillarie, or programmatic staff, especially if the donor has not had an opportunity to meet face-to-face with a staff leader
 - Personalized invitations to participate in a private tour or take part in a speaker presentation
 - Small group cocktail or coffee receptions, which could allow for donors to meet and mingle with each other





STAFFING & SYSTEMS

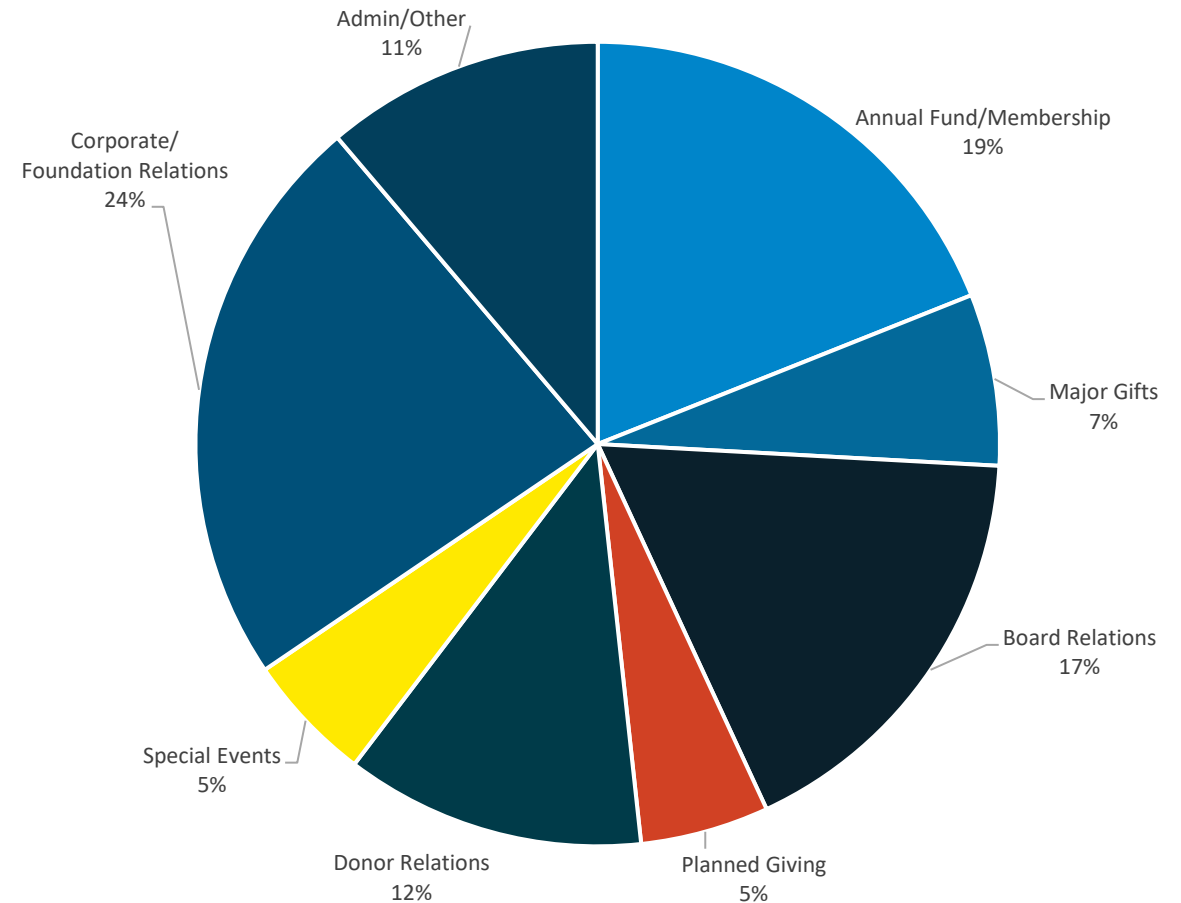
Staffing and systems must be in place to support volunteer leaders, manage donor relationships, and track and report on a higher level of development activity.

FINDINGS

Staffing & Systems

- The Wild Center's Development staff exhibits a wide range of tenure, with several staff enjoying over a decade at the organization and some newer staff being there for a year or less.
- The team's self-reported time allocations reveal that the most time (24%) is spent on Corporate & Foundation responsibilities and the least time (5%) is spent on Special Events and Planned Giving.
- **Major Gift responsibilities account for 7% of the team's time allocations or 0.4FTE.**
- There is an opportunity to structure and elevate stewardship and membership renewals.

DEVELOPMENT TEAM
TIME ALLOCATIONS



FINDINGS

Staffing & Systems

- The Wild Center will need to **qualify 150 \$100K+ Major Gift Prospects** for the campaign. This will likely take 600 total visits* (assumes 1 meeting to qualify and 4 cultivation/solicitation visits). If completed over 5 years, that is 10 visits per month on average, which requires 0.83 FTE focused on major gifts above \$100K.
- Additional staffing will be required to attend to the remaining number of prospects in the campaign gift table (<\$100K).
- The current composition of the staff is **0.4** FTE focused on major gifts**, which will allow the TWC to qualify and solicit 57 prospects over 5 years.

Scenario	Number of FTEs Making MG Visits	Total Possible Visits Per Month	Prospects (5 Year Campaign)	Prospect Meetings (5 Year Campaign)
With current FTE	0.4	4.8	57.6	288
Needed for all \$100K gifts	0.8	10	150	600
Needed for the recommended gift table	2.8	34	510	2,040

**Assumes 1 qualification meeting, 4 additional visits to cultivate/solicit, and 12 visits/month for a major gift FTE.*

*** Sum of percent of time spent by TWC staff on major gifts (from the 2023 materials review)*

FINDINGS

Staffing & Systems

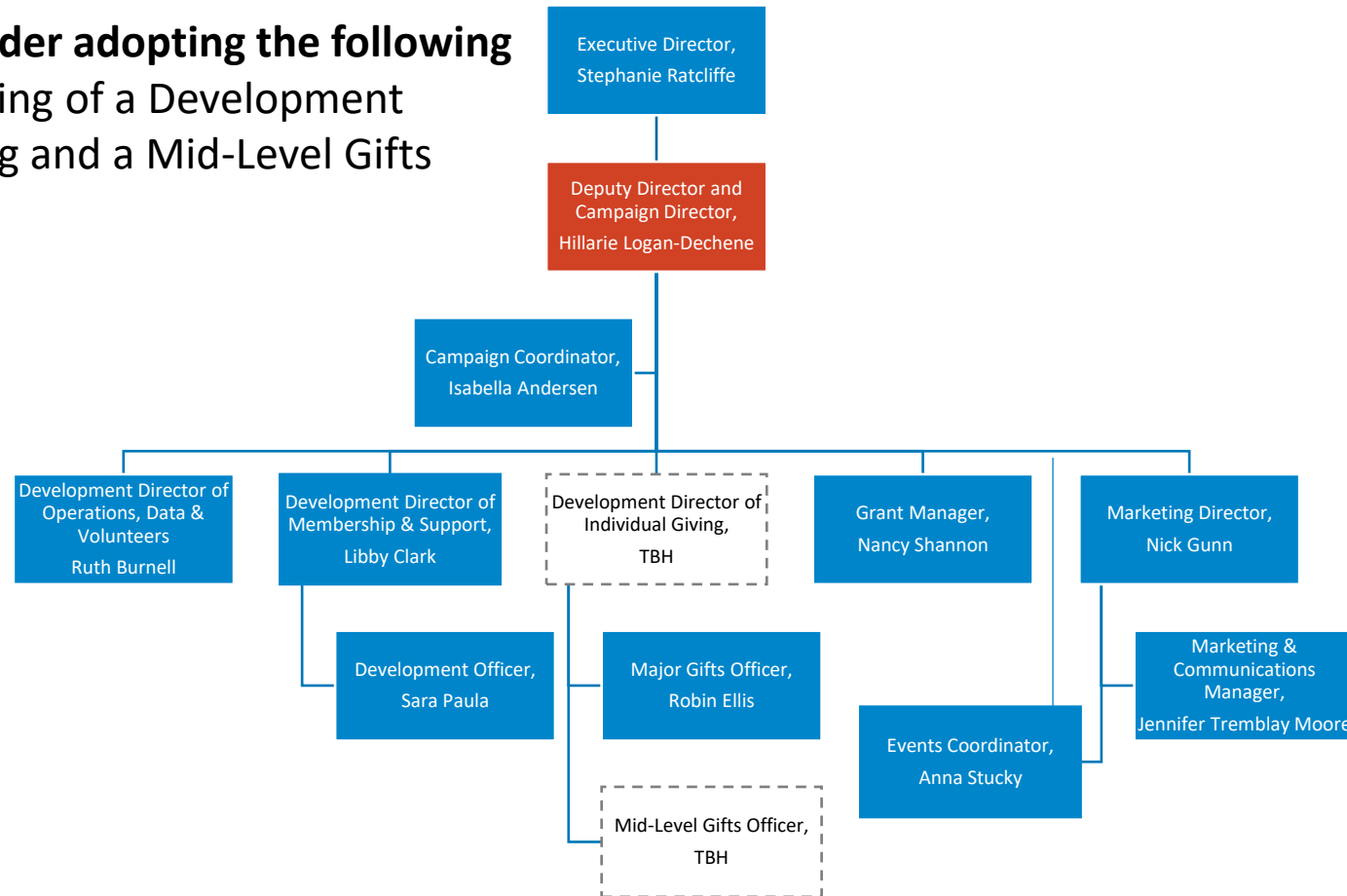
- **244 prospects reside in current Development staff portfolios.** While portfolios exist, there is an opportunity to develop processes to keep portfolios dynamic and comprised of high-capacity prospects.
- Some of the **annual giving and planned giving prospects could be major gift prospects** for the campaign, but they fall below the screening thresholds and might get overlooked.
- Internal staff meetings help disseminate organizational information and keep individuals informed. However, staff shared that there are **no standing meetings that specifically focus on discussing prospects** and building individual strategies.
- **TWC uses Altru as their donor database.** The staff is in the process of de-duping account records and organizing the donor database. While there are two years left on the contract, there is staff interest in exploring other databases for easier donor reporting. Database migrations are not easy, but there can be compelling reasons to do so at the beginning of a campaign.

RECOMMENDATION

Staffing & Systems

Hire new development staff positions to maximize the major gift fundraising activity necessary for a campaign.

- The Wild Center may **consider adopting the following structure**, including the hiring of a Development Director of Individual Giving and a Mid-Level Gifts Officer.



RECOMMENDATION

Staffing & Systems

**Hire new development staff positions to maximize the major gift fundraising activity necessary for a campaign.
(continued)**

Development Director of Individual Giving manages The Wild Center's major gifts fundraising program, develops and coordinates donor strategy, and implements coordinated fundraising practices across the organization.

High-level responsibilities include:

- Support the Deputy Director, manage the individual giving team, and provide leadership and oversight in developing strategies to expand The Wild Center's fundraising program.
- Personally manage a portfolio of major gift donors, top prospects (\$100k+), and future prospects.
- Support and participate in solicitation meetings with the Executive Director, the Deputy Director, and Board members, as appropriate.
- Lead monthly prospect review meetings to ensure a steady cadence of fundraising activity.
- Oversee cultivation and fundraising events.

The Mid-Level Gifts Officer forges relationships and develops and implements tailored strategies to identify, qualify, cultivate, solicit, and steward a personal portfolio for individual mid-level donors and prospects.

High-level responsibilities include:

- Maintain a personal portfolio of \$25k+ prospects, future prospects, high-end annual gift prospects, and meet or exceed annual fundraising goals through portfolio cultivation.
- Conduct one-to-one cultivation, solicitation, and stewardship meetings with donors and prospects.
- Use "moves management" to motivate donors and prospects to make "stretch" gifts to The Wild Center.
- Research prospects and prepare solicitation planning sheets and proposals for meetings with individual mid-level gift prospects.

RECOMMENDATION

Staffing & Systems

Formally establish major gift portfolios for front-line fundraising staff and establish a system of regularly re-balancing portfolios.

We recommend developing the outlined major gift portfolios for the following roles*:

Position	Prospect Type	Portfolio Size	Monthly Visit Goal	Time Spent on Major Gifts
Executive Director	Select Board, Committee, Leadership Donors (\$100k+), and Linda Vaughan Society prospects; serves as a Natural Partner for lead donors	10 - 15	2-3	30%
Deputy and Campaign Director	Select Board, Committee, Leadership prospects (\$100k+), and Linda Vaughan Society prospects. We recommend that the ED's portfolio is managed by the DD and the ED serves as the Natural Partner	35 - 50	3-6	45%
Development Director of Individual Giving, <i>recommended</i>	Major gift donors, top prospects (\$100k+), and future prospects	75 - 100	8-10	75%
Major Gifts Officer	Major gift donors, top prospects (\$100k+), and future prospects	125 - 150	10-12	100%
Mid-Level Gifts Officer, <i>recommended</i>	\$25k+ prospects, future prospects, high-end annual gift prospects	50 – 75 major gift prospects <i>(Additional annual gift prospects)</i>	8-10	60%
TOTAL		295 – 390		



*TWC may also want to consider adding or enhancing portfolios for Libby Clark and Ruth Burnell.

RECOMMENDATION

Staffing & Systems

Establish relationship management meetings and processes, including regular donor reports.

- Meet as a team on a regular basis to **collaborate on prospect strategy, prepare for upcoming visits, and problem solve** as needed.
 - Establish a cadence of bi-weekly, 60- to 90-minute meetings. As the campaign progresses and outreach becomes more routine, meetings may become less frequent.
 - Regular participants should include any team members managing campaign prospects and the Development Director of Operations, Data & Volunteers—who will help prepare the data and research needed to support prospect strategy conversations, ensure necessary updates are captured in the database, and serve as a thought partner to frontline fundraisers.
 - Each meeting should include time for general campaign updates and roundtable discussion in which fundraisers share their progress qualifying and cultivating the top prospects in their portfolio, invite input from the group on outreach strategies, and workshop ask amounts, solicitation teams, case messages, ec.
- Donor reports will be important for **tracking and assessing campaign activity**. Consider establishing the following reports:
 - Portfolio Report
 - Open Major Opportunities Report
 - Contact Report
 - Campaign Donor Report



RECOMMENDATION

Staffing & Systems

Standardize The Wild Center's relationship management and database systems to consistently collect, record, and track data.

- **Fully leverage the database for relationship management** to allow The Wild Center to coordinate the increased cultivation of major prospects that a campaign will require. Key database practices will include:
 - Finishing de-duping prospect records and cleaning biographic data in the donor database
 - Managing all prospects and assigned portfolios and ensuring proper use of prospect staging
 - Documenting cultivation strategies for each prospect
 - Capturing all significant contacts and cultivation actions
 - Tracking progress and producing regular reports
- To ensure that all staff members consistently use the database, we recommend that The Wild Center **provide a series of trainings and resources to support aligned activity.**
 - Participate in Blackbaud University's free e-learning session: "The Basics of Blackbaud Altru" and participate in additional database-specific trainings as needed.
 - Establish a Data Governance Policy that documents data entry procedures, outlines roles, and defines data management responsibilities.
 - Develop a Relationship Management Handbook that describes the processes of thoughtfully engaging donors and prospects and tracking the relationship stages in the database.



NEXT STEPS



Discuss and agree on a campaign strategy and goal



Thank study participants and share the executive summary with them



Leverage the connection with participants to advance conversations around early gifts to the campaign



Adopt the study recommendations to prepare for the campaign



The Campbell & Company team extends our sincere gratitude to The Wild Center for your engagement, hard work, and thoughtful attention throughout the study process.

It has been our pleasure to work with your outstanding staff and enthusiastic community of volunteers and supporters, and we look forward to working with the organization in the future.

Cassie Carter, Ph.D. – Vice President, Fundraising / Director, West Region

Christina Knaier – Vice President, Communications

Perry Brimijoin – Senior Consultant, Fundraising

Rowan Barnes – Senior Analyst, Strategic Information Systems

Hailey Nishita – Consultant, Fundraising

Rosie Chevalier – Associate Consultant, Communications



APPENDICES

APPENDIX A:

Study Participants

CASE INTERVIEW & WORKSHOP PARTICIPANTS

Lee Bailey	Hillarie Logan-Dechene
Joseph Beck	Jack Ryder
Ruth Burnell	Charlie Svenson
Libby Clark	Karen Thomas
Robin Ellis	Leah Valerio
Emily Forbes	Virginia Valkenburgh
Lynn Fox	Kerri Ziemann
Jen Kretser	

INTERNAL INTERVIEW PARTICIPANTS

Ruth Burnell	Hillarie Logan-Dechene
Libby Clark	Stephanie Ratcliffe
Robin Ellis	Karen Thomas
Bob Kronenberger	Phil Wagschal

EXTERNAL INTERVIEW PARTICIPANTS

Joseph Beck	John & Sandra Reschovsky
Terry & Lynn Birdsong	Brooks Reynolds
George Cigale	Jack Ryder
Jim Elrod	Joe & Rena Sellin
Charlie Frenette	Nancy Simpkins
Joan & Reg Gignoux	Charlie Svenson
Barbara Grose	Michael Tardif
Gary Hartwick	Rebecca Thompson
Ben Ireland	Joel Treisman
Nancy Olson	Craig Weatherup

APPENDIX B:

Campaign Director Job Description

The Campaign Director assumes primary responsibility for supporting the leadership team in carrying out a campaign. The Campaign Director works closely with volunteer leadership in establishing systems and implementing strategies and management plans to effectively coordinate campaign responsibilities.

CAMPAIGN DIRECTOR RESPONSIBILITIES

Responsibilities

- Manage daily operations of the campaign in coordination with annual fundraising efforts.
- Facilitate Campaign Steering Committee meetings and coordinating volunteer assignments
- Monitor campaign progress and reporting to the Campaign Steering Committee and Board
- Manage a personal portfolio of campaign prospects, responsible for advancing relationships on behalf of the organization, and for carrying out cultivation, solicitation, and stewardship activities with a focus on securing leadership and major gifts
- Support the Executive Director on campaign-related duties
- Coordinate the development and timely submission of campaign proposals to private funding sources and foundations
- Work with volunteers, Board, staff, and committee members to identify individual prospects, including scheduling and basic prospect research
- Serve as a spokesperson and ambassador for the campaign in a variety of contexts
- Oversee the campaign case development and materials
- Design and distribute campaign reports and records
- Work with finance office to manage the campaign fundraising budget
- Ensure sound strategy and operational processes for all donor recognition activities, campaign records management, and gift processing

APPENDIX C:

Campaign Steering Committee Job Description

The Campaign Steering Committee serves as the campaign's leadership group throughout the campaign. With oversight from TWC's Board and partnership from volunteer leaders, the Committee assists in monitoring campaign progress, cultivating and soliciting key donors, and building enthusiasm for the campaign among all TWC's constituents. The Committee is led by 2 Campaign Co-Chairs and 8-10 additional members. The Committee's work will be organized in a manner that ensures efficient and appropriate use of its members' time and skills.

COMMITTEE RESPONSIBILITIES:

Fundraising and Donor Relations

- Facilitate connections between TWC staff leadership and potential donors
- Cultivate and solicit leadership and major gift donors
- Help develop and prioritize the list of potential campaign donors
- Provide input on individual potential donor cultivation and solicitation strategies
- Open doors to potential donors
- Personally thank and steward donors

Campaign Communications and Advocacy

- Advocate for TWC and its campaign among the local community
- Provide input on campaign communications strategies and materials
- Host small gatherings and events

Campaign Management

- Attend regular committee meetings and participate in individual meetings with staff or committee leaders
- Assist in identification and recruitment of key campaign volunteers as needed
- Track and drive TWC's progress toward achieving key benchmarks

APPENDIX D:

Stewardship Types



Recognition

Thanking your donor for their specific gift and showing gratitude for the impact they made possible.

What this looks like ...

- Acknowledgement/tax letter
- Custom report detailing impact of gift
- Annual report listing
- Donor wall listing
- Thank-you call from staff
- Thank-you call from non-staff, such as Board members and other volunteers



Celebration

Celebrating your donor's contribution with joy and recognition in a more emotive and festive way.

What this looks like ...

- Social media shout-out
- Awards or certificates
- Celebrating a milestone in giving or scientific achievement
- Honoring a donor's gift or story through public forum

APPENDIX D:

Stewardship Types (continued)



Aspiration

Lifting your donor's sights to what is possible for TWC through their giving.

What this looks like ...

- Exclusive events or benefits for higher giving levels
- Communications focused on big visions
- Inspirational language (“meeting the moment...”)



Education

Teaching a donor about the impact, vision, and process for achieving shared goals. This is an opportunity to share details and go deeper in a donor's understanding.

What this looks like ...

- Advocacy updates
- Funder briefings



Community

Build a connection with TWC and your community of supporters.

What this looks like ...

- Online portals
- Social media
- Events
- Volunteer activities
- Honoring their gifts as collective (i.e., “what have we achieved together?”)

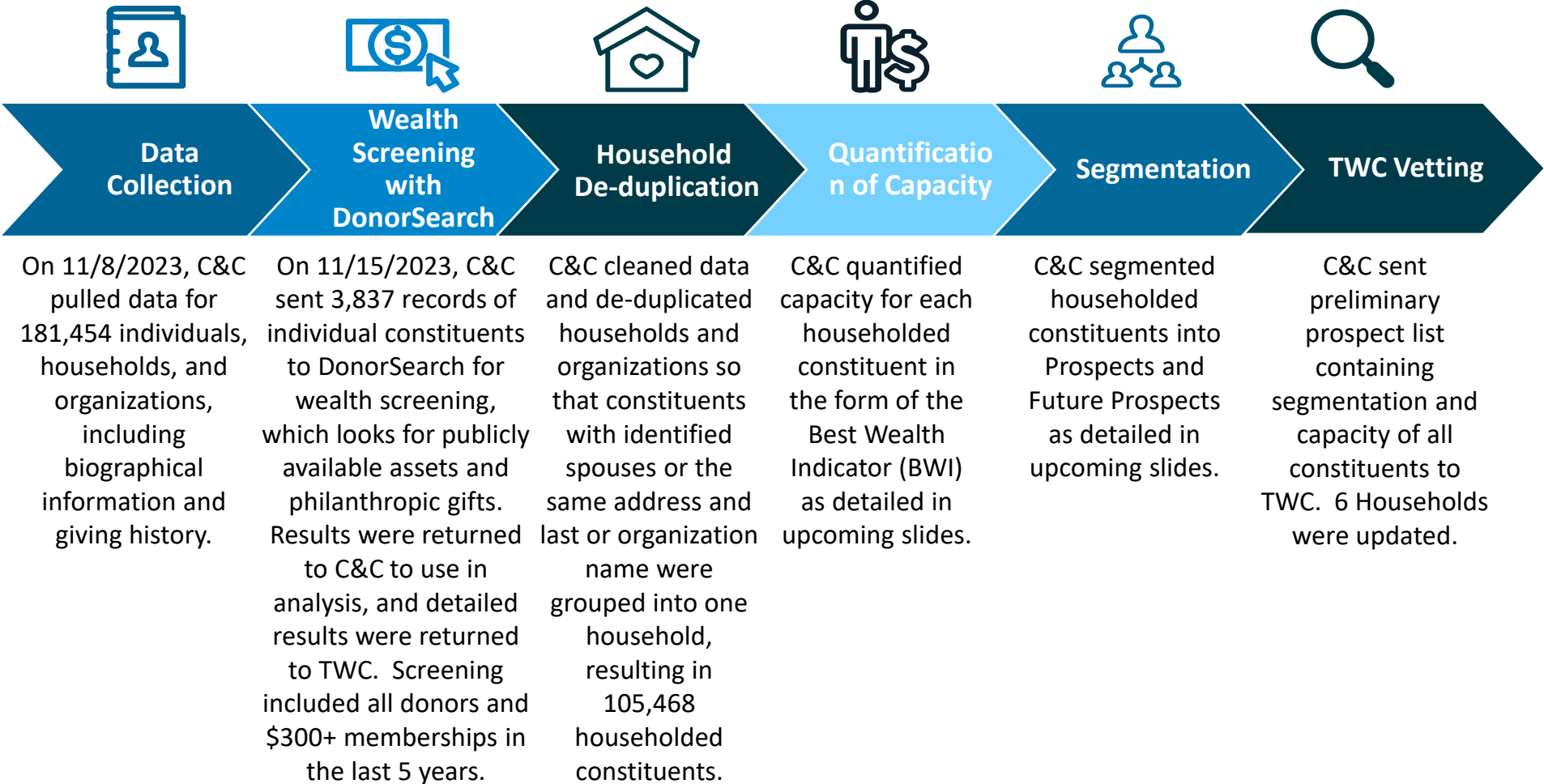


CAPACITY ANALYSIS REPORT

DECEMBER 2023

METHODOLOGY & DEFINITIONS

METHODOLOGY



QUANTIFICATION OF CAPACITY

The capacity of a constituent is quantified in the form of the Best Wealth Indicator (BWI).

The BWI is the estimated amount that a constituent is able to give to **all** philanthropic interests over **five** years. For this analysis, the BWI was calculated as the maximum/largest of the following:

- Largest gift amount to TWC (hard and soft credit)
- Five years of fundraising progress to TWC (11/08/2018 – 11/08/2023, hard and soft credit, outright gifts and pledges)
- Five years of cash giving to TWC (11/08/2018 – 11/08/2023, hard and soft credit, outright gifts and pledge payments)
- Estimated capacity from DonorSearch
- Largest gift found by DonorSearch (minimum of the range)



Notes

- For this analysis all memberships over \$300 were considered gifts.
- Capacity is capped at \$30M in order to keep the ultra-wealthy from skewing results.
- Capacity for Donor Advised Funds are set to zero.
- Capacity for Organizations is based on prior giving and multiplied by 3, since organizations cannot be wealth screened.

SEGMENTATION

A **Prospect** is a household or organization that looks like a near term major gift donor to TWC.

A Prospect is categorized as such if the household or organization has an active major or planned gift plan or if they meet the following conditions:

		
AFFINITY	+	RECENCY
Largest gift \geq \$1000		Giving in the
OR		last 3 years
Top 10% of RLM Score*		(11/08/2020 –
OR		11/08/2023)
Top 20% of Monetary Score		

A **Future Prospect** is a household or organization that does not look like a near term major gift donor to TWC because they look less engaged and/or less philanthropic.

A Future Prospect is categorized as such if the household or organization does not satisfy the Prospect conditions.

Note: Any constituents that are deceased, inactive, or have asked not to be solicited by TWC were disqualified from the analysis.

* See Appendix A for details on how the RLM score was created.

RLM SCORE

- Adaptation of a RFM score - focused on increasing engagement rather than just highest dollar amount
- Determined by the recency, *lift*, and monetary value of the largest gift made in the last ten years
- Each component is assigned a score ranging from 0 – 10 and the scores are added together to provide a RLM score ranging from 0 – 30
- Lift measures the largest gift in the last 10 years relative to the constituent’s mean gift over the last 10 years
 - Additional measures are used to make lift not dependent on the monetary value of the largest gift (e.g., a largest gift of \$2K with a mean gift of \$1K would mean the same as a largest gift of \$20K with a mean gift of \$10K)

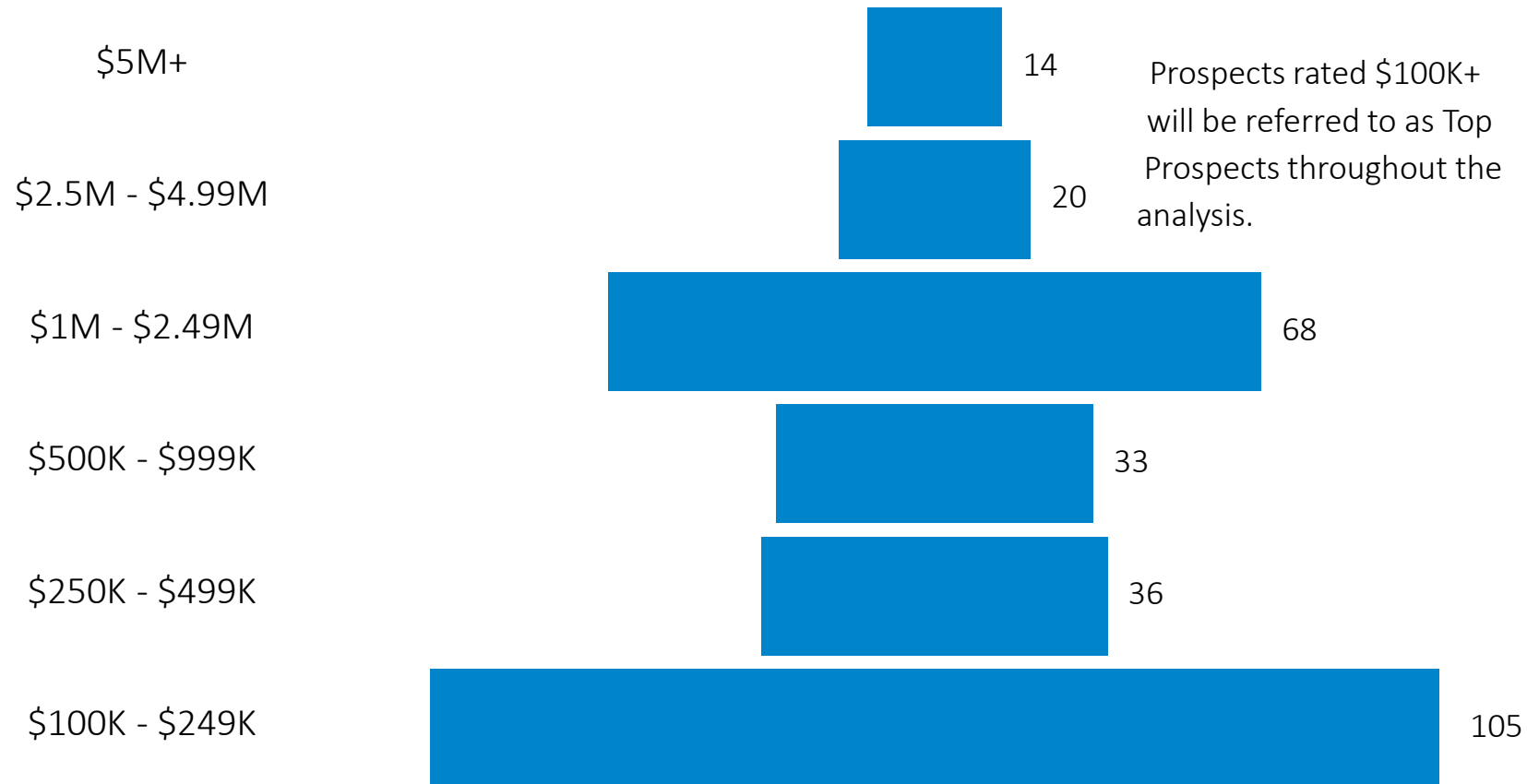
	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023	RLM
Example 1	125			875	2000	150	6000	6025	8219	15000	15000	29
Example 2	335	370	335	500	335	345	450	15150	2745	690	500	26



CHARACTERISTICS OF TOP PROSPECTS

CAPACITY OF TOP PROSPECTS

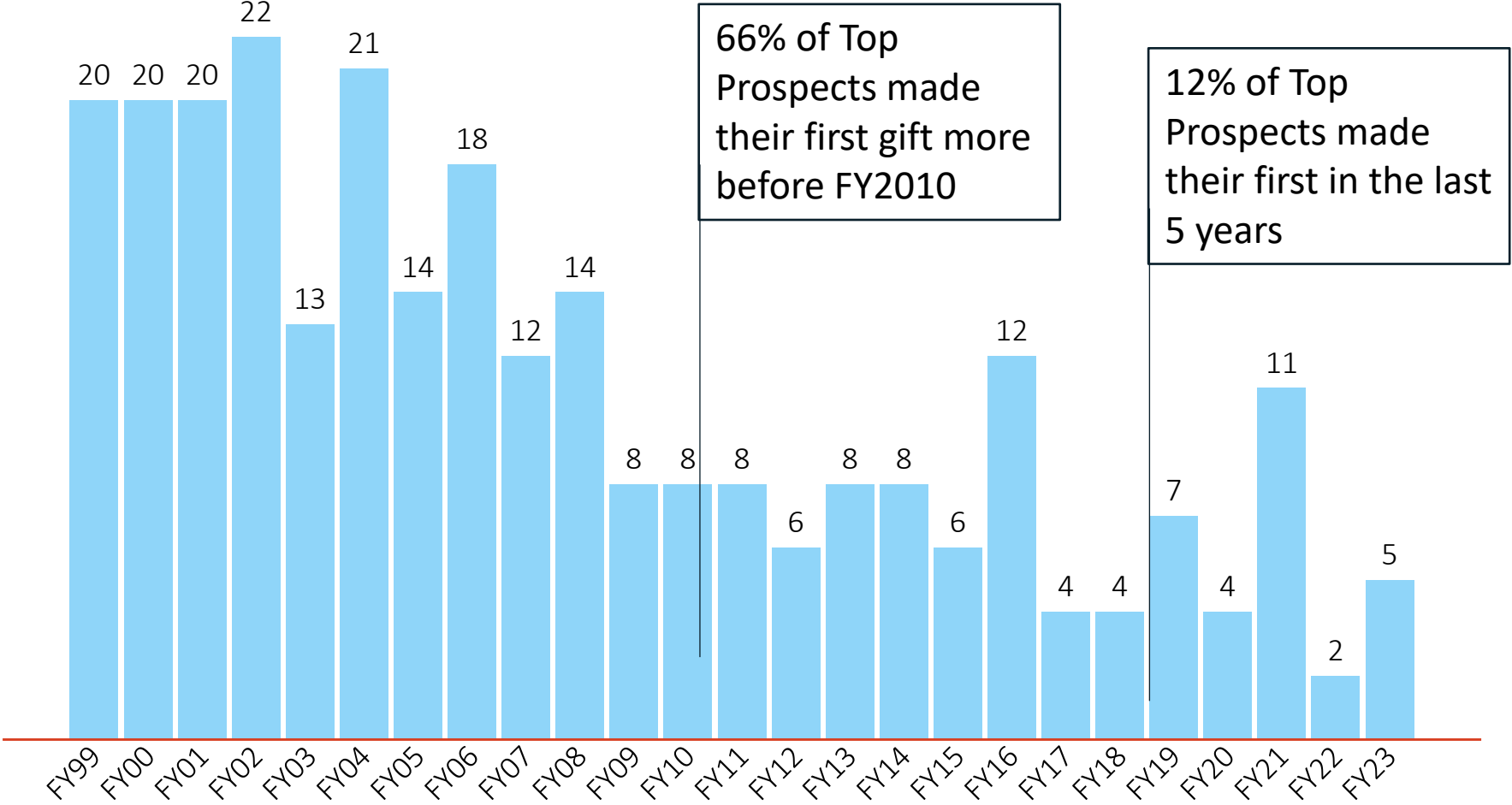
Campbell & Company found \$449M in capacity* from 276 Prospects rated \$100K+, as well as another \$1.1B in capacity from 755 Future Prospects rated \$100K+.



* Capacity is defined in terms of the BWI, as detailed on a previous slide. BWI is the estimated amount a household or organization is able to give to all philanthropic interests over five years.

LONGEVITY OF TOP PROSPECTS

TOP PROSPECTS BY FISCAL YEAR OF FIRST GIFT

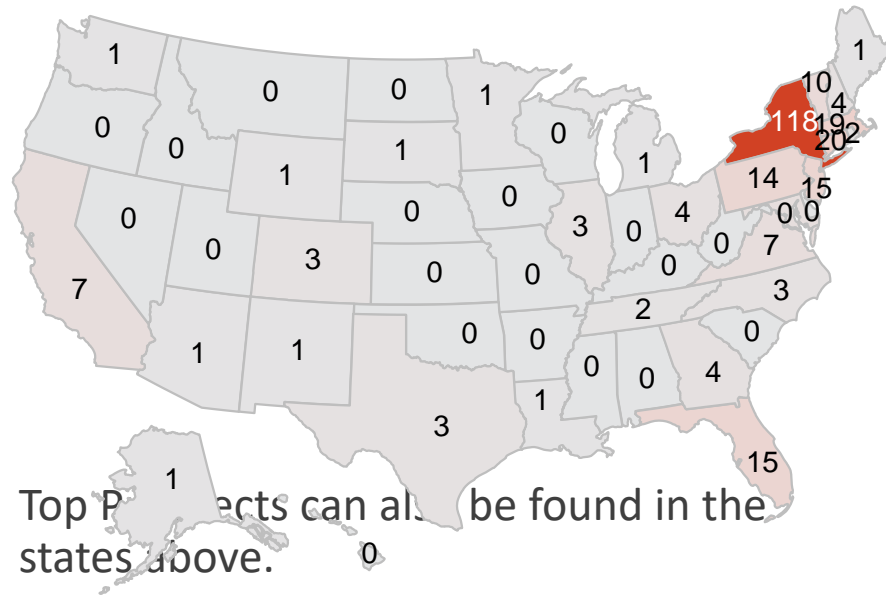


Engagement of Top Prospects who are longtime donors may look different than those who made their first gift more recently.

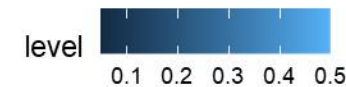
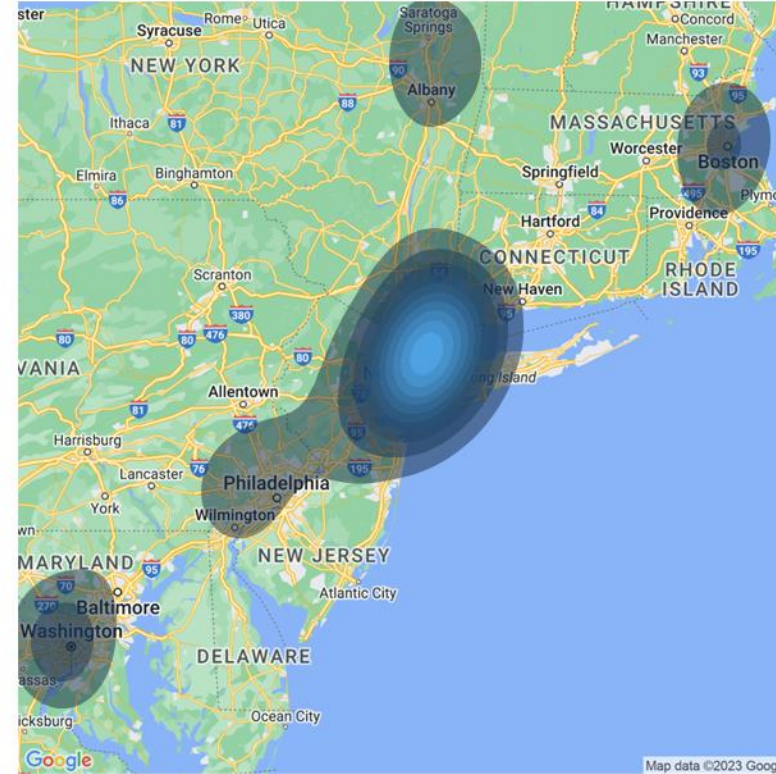
LOCATION OF TOP PROSPECTS

TOP PROSPECTS BY PRIMARY HOME ADDRESS

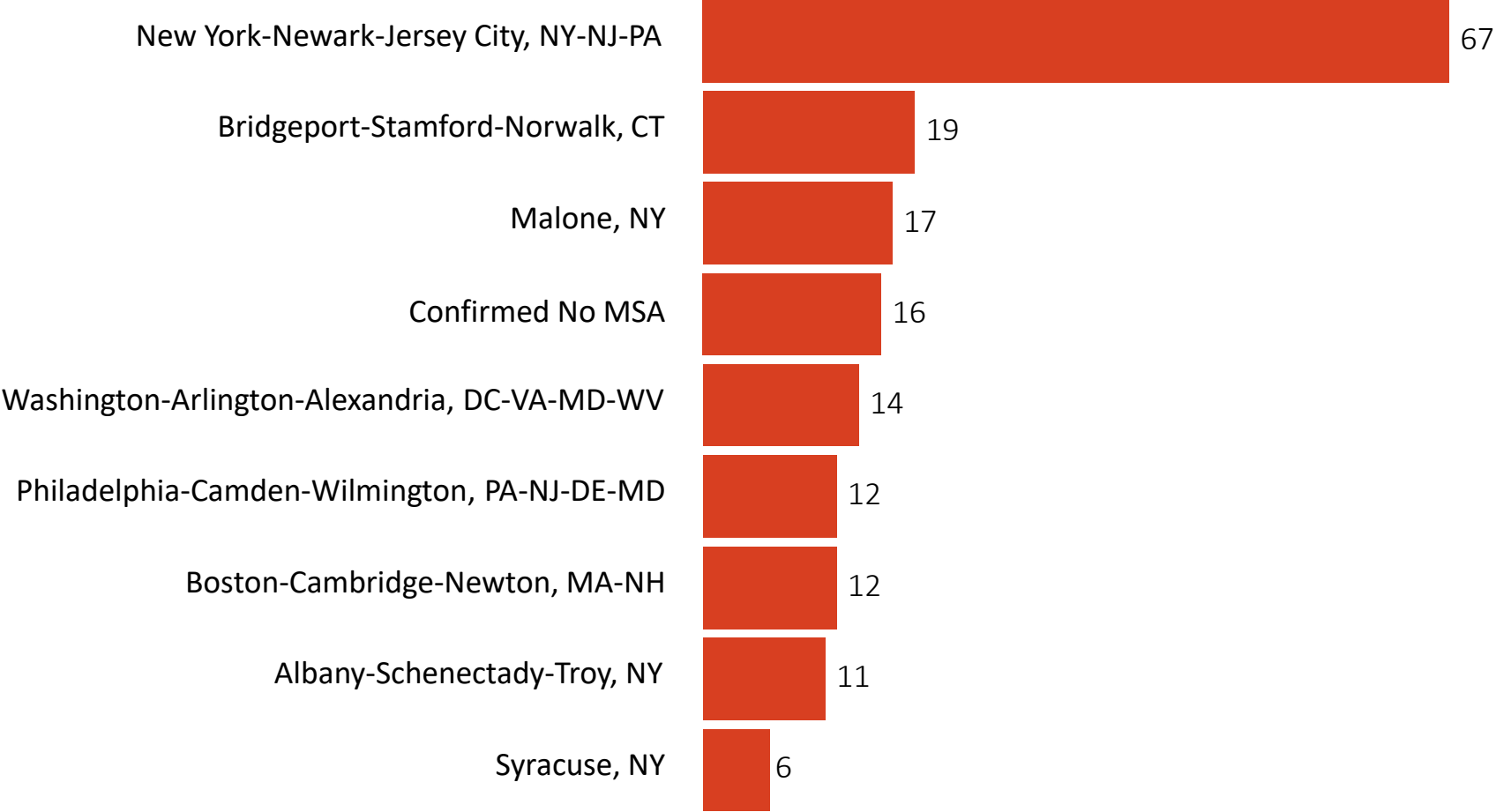
42.8% of Top Prospects live in NY, which represents 42.6% of capacity.



Top Prospects can also be found in the states above.



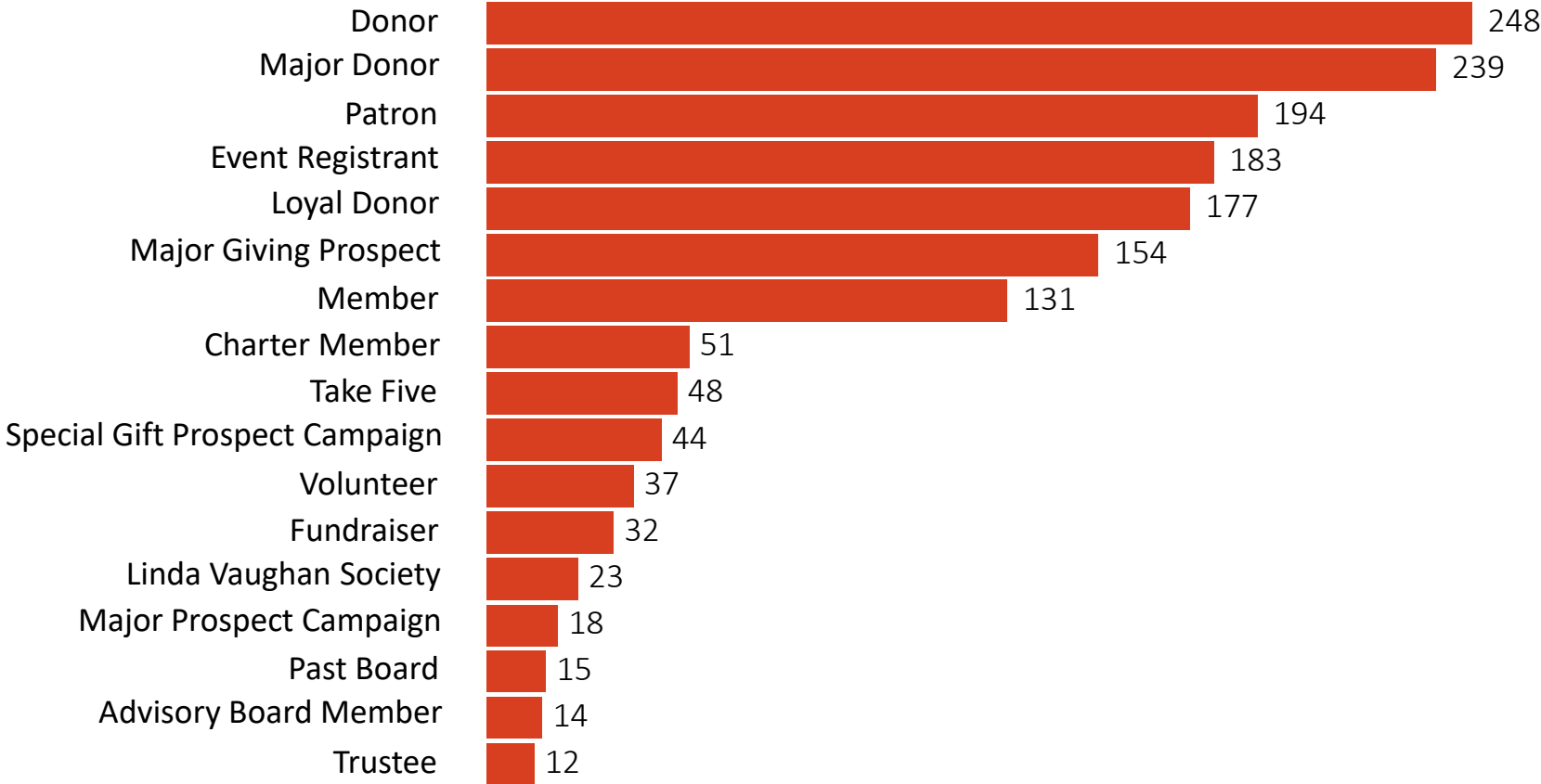
METRO STATISTICAL AREAS OF TOP PROSPECTS



For 255 (92%) Top Prospects, Metropolitan Statistical Areas were found based on zip code. MSAs with 5 or more Top Prospects are shown above.

CONSTITUENCY OF TOP PROSPECTS

TOP PROSPECTS BY CONSTITUENCY CODE OF HEAD OF HOUSEHOLD

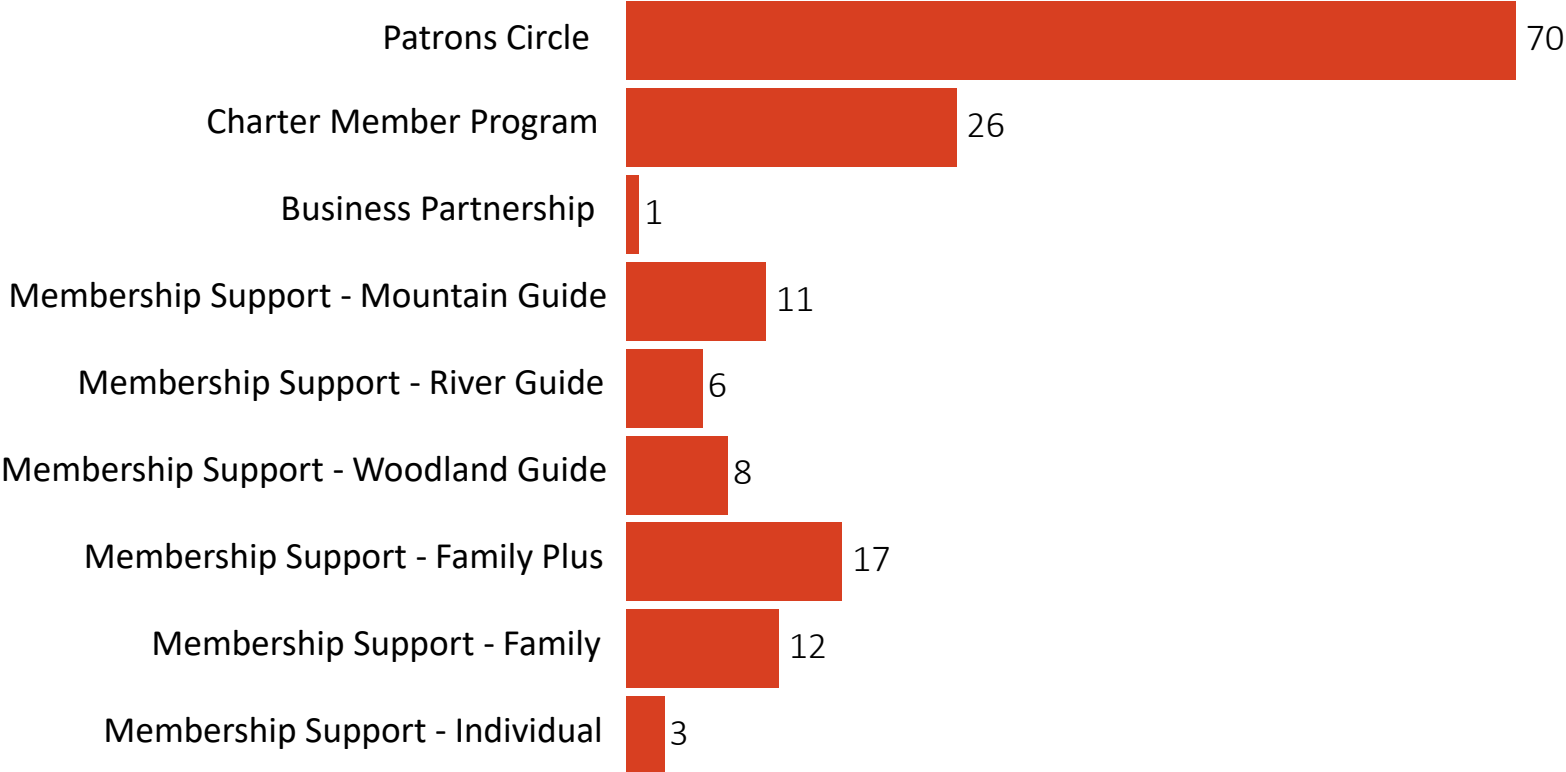


The number of Top Prospects in each constituency can be seen above. Some Top Prospects may belong to more than one constituency.

MEMBERSHIP OF TOP PROSPECTS

TOP PROSPECTS BY MEMBERSHIP LEVEL

- 57 Top Prospects have a Membership Support level
- 70 are part of the Patrons Circle



Some top prospects may have more than one type of membership

BOARD GIVING

- Most current Board members are Prospects (72% of current Board members), many of which have \$100K+ capacity (54% of current Board members). The breakdown can be seen below.

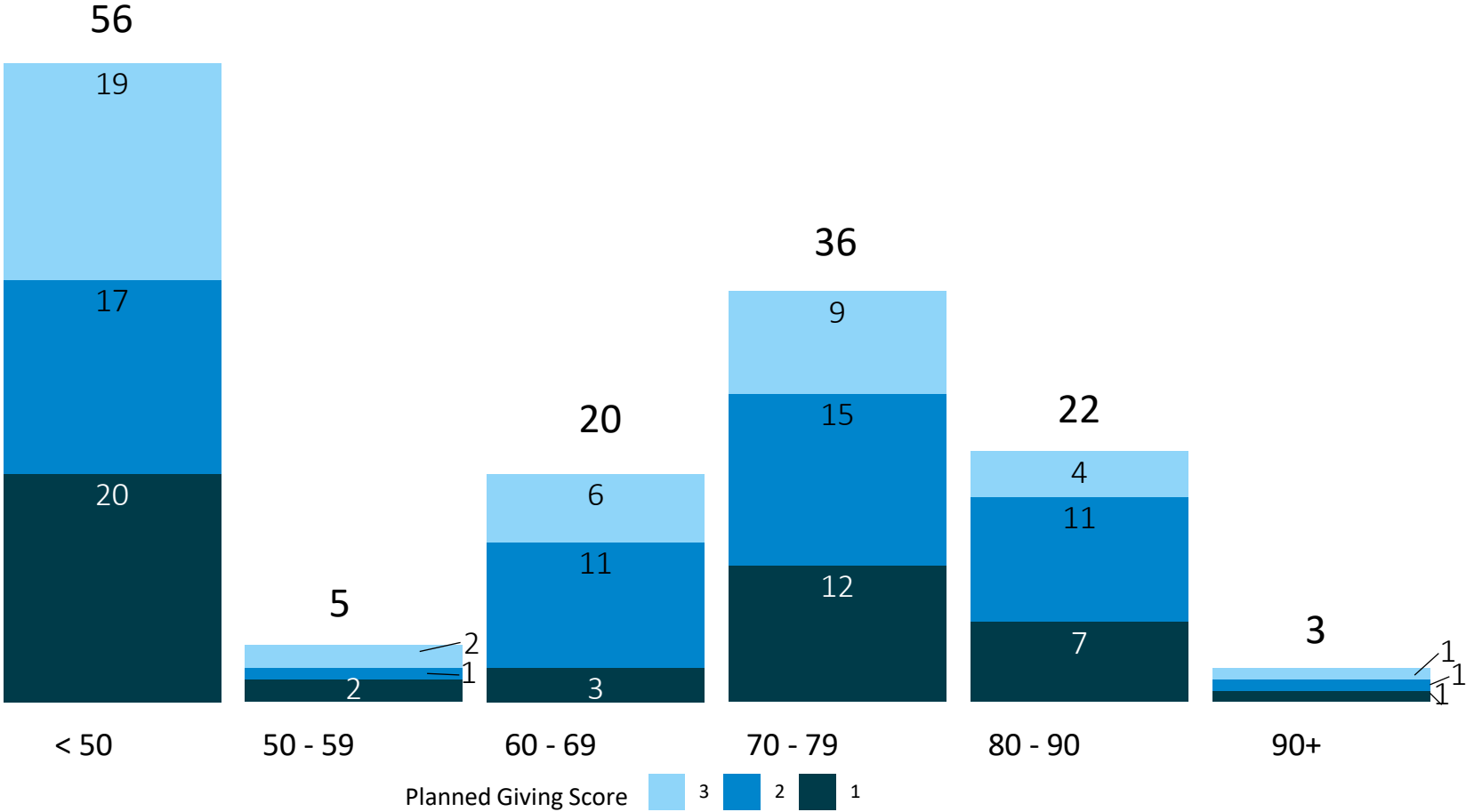
Board	\$100K+ Prospects	<\$100K Prospects	\$100K+ Future Prospects	<\$100K Future Prospects
Advisory Board Member	14	4	2	12
Trustee	14	12	1	1
Emeritus Trustee	3	0	1	0
Total	29*	15*	4	13

* Constituents within the same household are on multiple Boards

PLANNED GIVING

TOP PROSPECTS BY AGE AND DONORSEARCH PLANNED GIVING SCORE

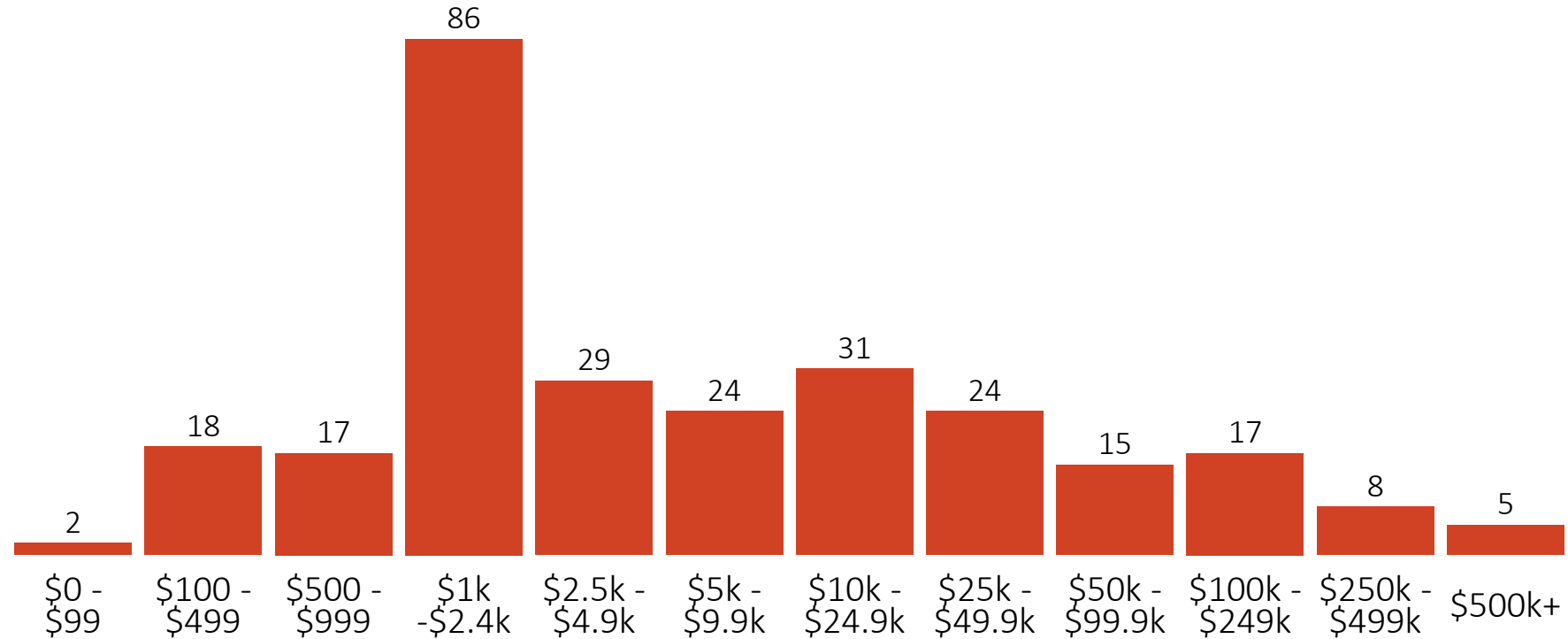
- 24 Top Prospects are already part of the Linda Vaughan Society
- 142 additional Top Prospects with \$248M in capacity have a DonorSearch PG ID score of 1-3*



* A PG ID score of 1-3 is considered a good planned gift prospect. Lower scores indicate better planned giving prospects. Scores are based on giving history and not on age.

OPPORTUNITY TO INCREASE GIVING

TOP PROSPECTS BY LARGEST GIFT



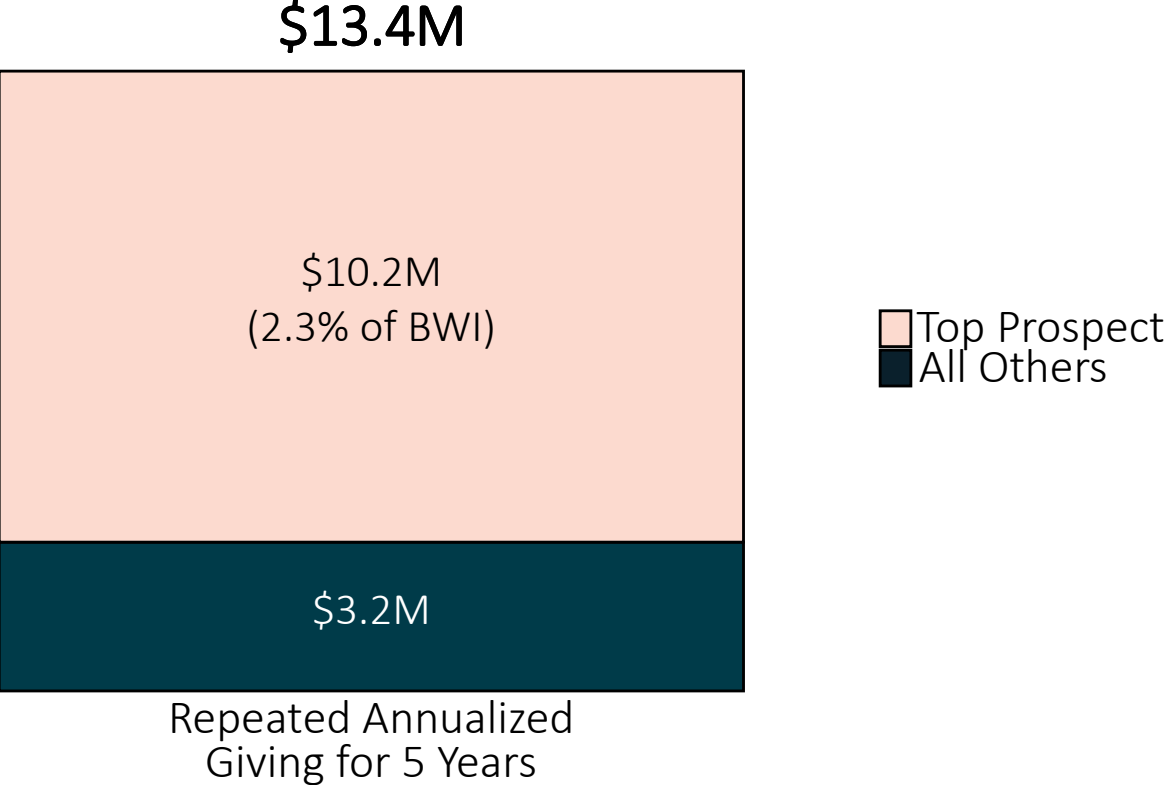
Most Top Prospects are not giving commensurate with their capacity.

This marks a significant opportunity to increase giving:

- 55% have not given a gift of \$5K or more, and
- 75% have not given a gift of \$25K or more.

CAMPAIGN BASELINES

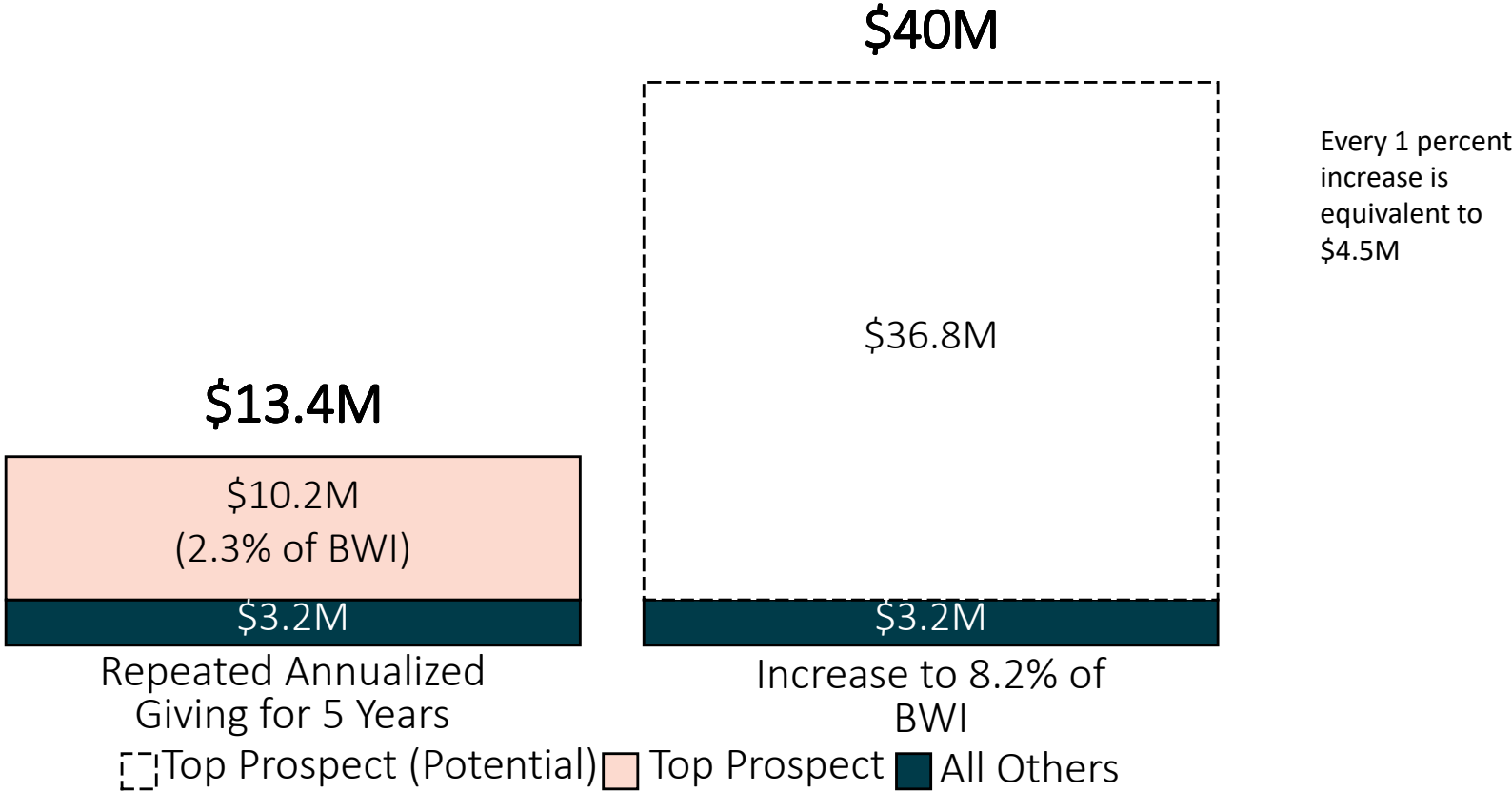
The baseline assumes that anyone who is not a Top Prospect will continue to give, on average, what they have annually* for the next 5 years, which totals \$3.2M. If Top Prospects repeated their annual gift for 5 years, they would give 2.3% of their BWI.



*Annual gift is based on the average of all gifts over the last five years

CAMPAIGN POTENTIAL

With additional attention from TWC’s staff, we assume that Top Prospects will give a greater percentage of their BWI. In the scenario below, we show the increase in giving from Top Prospects that would be necessary for TWC to achieve its campaign goal. Top Prospects will need to give, on average, 8.2% of BWI for TWC to achieve its goal.



\$40M Gift table

Gift/Pledge Level	Gifts Needed	Qualified Prospects Needed	Subtotal (\$)	Cumulative (%)	Identified Prospects	Surplus (Gap)	Future Prospects
\$5,000,000	2	6	\$10,000,000	25%	14	8	32
\$2,500,000	3	9	\$7,500,000	44%	20	11	22
\$1,000,000	6	18	\$6,000,000	59%	68	50	267
\$500,000	10	30	\$5,000,000	71%	33	3	102
\$250,000	15	45	\$3,750,000	81%	36	(9)	59
\$100,000	30	90	\$3,000,000	88%	105	15	273
\$50,000	40	120	\$2,000,000	93%	69	(51)	259
\$25,000	50	150	\$1,250,000	96%	93	(57)	605
\$10,000	100	300	\$1,000,000	99%	81	(219)	694
Less than \$10,000	Many	Many	\$500,000	100%	138		100,929
Total	256	768	\$40,000,000		657		103,242

APPENDICES

APPENDIX A: RLM SCORES

C&C created a score for each constituent called a Recency, Lift, Monetary (RLM) score. The purpose of this score is to reflect a constituent’s giving patterns to The Wild Center as a measure of affinity. The RLM score is from zero to thirty and is made up of three distinct scores of zero to ten. The distribution of each score is displayed below. RLM scores of 23 are in the top 10% of scores.

Score	Recency: Date Since Largest Gift		Lift: Difference in Largest Gift and Average Gift		Monetary: Largest Within Year Amount Last 10 Years	
	Minimum	Maximum	Minimum	Maximum	Minimum	Maximum
1	11/12/2013	11/7/2014	0.32	0.58	\$1	\$8
2	11/10/2014	11/6/2015	0.59	0.71	\$9	\$20
3	11/9/2015	11/7/2016	0.72	0.81	\$21	\$25
4	11/8/2016	11/7/2017	0.82	1.02	\$25	\$50
5	11/8/2017	11/7/2019	1.03	1.15	\$52	\$100
6	11/12/2019	11/6/2020	1.16	1.32		
7	11/9/2020	11/7/2021	1.33	1.59	\$101	\$150
8						
9	11/8/2021	11/7/2022	1.97	2.51	\$301	\$1,000
10	11/9/2022	11/8/2023	2.52	9.36	\$1,006	\$1,000,000

APPENDIX B: GIFT TYPES

The analysis included all revenue records with a revenue type of Gift, Membership, or Membership Add-on. The gifts were counted either as cash, fundraising progress, or both based on the definitions below.

Revenue Type	Application	Transaction Type	Gift Type for Analysis
Gift	Matching gift	Payment	Cash Only
Gift	Pledge	Payment	Cash Only
Gift	Donation	Matching gift claim	FRP Only
Gift	Donation	Pledge	FRP Only
Gift	Event registration	Order	FRP Only
Gift	Event registration	Payment	Cash and FRP
Gift	Donation	Order	FRP Only
Gift	Order	Payment	Cash Only
Gift	Recurring gift	Order	Removed
Gift	Donation	Recurring gift	Removed
Gift	Recurring gift	Payment	Cash and FRP
Gift	Donation	Payment	Cash and FRP
Membership	Membership	Matching gift claim	FRP Only
Membership	Membership	Order	FRP Only
Membership	Membership	Payment	Cash and FRP
Membership	Order	Payment	Cash Only
Membership add-on	Membership add-on	Order	FRP Only
Membership add-on	Membership add-on	Payment	Cash and FRP
Membership add-on	Order	Payment	Cash Only