

CONFIDENTIAL MEMORANDUM

Not For Distribution

Date: October 8, 2020

To: Julie Quinlan Brame, Senior VP of Development, Milwaukee Public Museum

From: Melissa Berliner, Vice President, Campbell & Company

Re: Summary of 2018 Readiness Report

In the winter/spring of 2018, Campbell & Company conducted an assessment of the Milwaukee Public Museum's (MPM) fundraising program. Our process included a comprehensive review of materials related to fundraising performance; confidential staff interviews; a review of database utilization; a wealth screening and analysis of philanthropic capacity within the donor pipeline; and development of a final report.

In addition to results from our analysis, there were several internal and external contextual factors that informed our final report, including:

- A general perception that MPM was in the midst of an exciting renaissance, with the Museum's debt cleared, strong support and interest from the public, and new, more immersive exhibits to offer
- The Museum's strong leadership (Board and staff) that was helping set a smart course for the future, carefully assessing, planning, and building buy-in amongst key stakeholders within and beyond MPM
- A stabilized fundraising program that was supporting this forward momentum
- The anticipated retirement of the Vice President for Development, with a named successor in place and onboarding
- An awareness of a new museum building on the horizon for MPM that garnered significant public interest and "buzz"

Our report focused on opportunities to grow MPM's annual giving program, with an eye toward capturing a greater percentage of philanthropic capacity from high-rated donors and prospects. We recommended that the Museum embrace a goal to increase annual unrestricted support from \$3.9 million (average between FY15 and FY17) to \$6.7 million in 5 years. Further, we concluded that an aggressive growth strategy would set the stage for a major campaign to build a new home in the future. We offered several tactical strategies and supporting guidance to attain this goal, chief among them:

- Recalibrating donor moves management practices to strengthen the pipeline for major giving, and adopting more rigorous systems and metrics to move prospects toward solicitation readiness
- Focusing on high-touch, personal donor engagement strategies, including leveraging Museum staff and Board leadership to make connections, build relationships and solicit gifts
- Developing a communication plan to shape and share messages about the future museum project with heavy segmentation around audience
- Adding new staff positions to support out the door fundraising and to build the individual major giving pipeline

The roadmap we set forward included several key milestones, noting the need for a campaign feasibility study to be launched in the spring of 2020 followed by the launch of a campaign at the end of 2020/beginning of 2021.