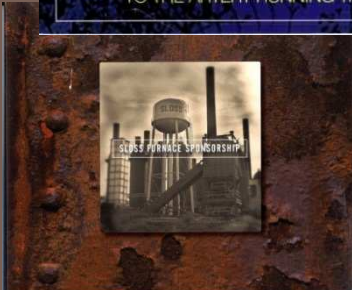
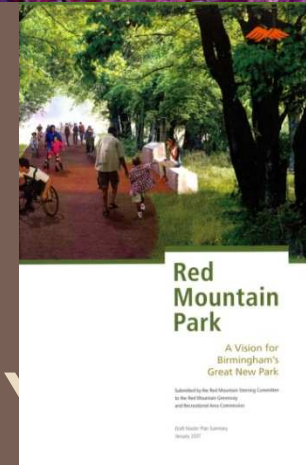
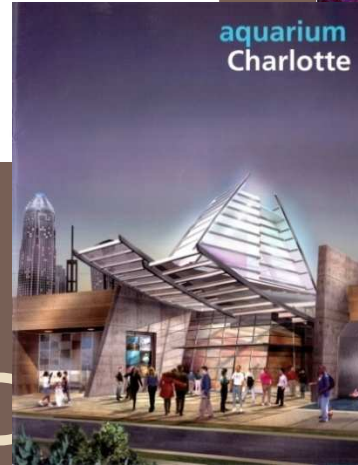


The Case for the Campaign

Museum of Fine Arts, Boston



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A to Zs of Designing Your Case

Deborah Spiegelman
Miami Children's Museum

Robert E. Brais
ConsultEcon, Inc.

Presentation Outline

- Developing Case for Support or “Case Statement”
- What the Case should Include
- Preparing your Case
- Economic Impacts as a project benefit
- What is Economic Impact Analysis
- Presenting your Case / getting the most from it
- Responding to questions about your Case
- Discussion

Developing Your Case for Support

- “Case for Support” is a statement designed to attract people to support your children’s museum
- Can be a new museum, expansion or ongoing operating support
- Funding generally requires multiple sources, and the case should appeal to many audiences

Audiences for your Case

- Private philanthropy
- Government funders
- Foundations
- Corporate funding
- Financial institutions
- Recruit board and volunteers
- Recruit executive director and key staff
- Attract members
- Inform the community at large

Aspects of a Case....Unified Voice

- Mission
- Who will you serve?
- What is the value?
- Where is it going to be located?
- When/timeline
- Why is this project necessary?
- How **will we** achieve this?
 - ▣ Human capital/investment
 - To answer a would-be donor, grantor or volunteer:
why should I support this project?

Every Case is Different

Example of a Case Approach:

- An inspiring **vision**,
- A statement of your intended **objectives**,
- Well argued and measurable **outcomes**, and
- A carefully thought out **business plan**.

NB: You may need to adapt the case structure to fit your project's individual characteristics and needs.

Source: The Diocese of Oxford, UK.

Preparing Your Case

1. The Need Addressed

- ▣ The Challenge (Problem): what project you are fundraising for and why

2. The Vision: What is the project

- ▣ The Mission: goals that your organization has set to make the Vision a reality
- ▣ The Goals: specific organization accomplishments in a specific timeframe

3. Project Benefits

- ▣ Tangible and intangible benefits

Preparing Your Case

(continued)

4. Action Plan
 5. Progress to Date
 6. A Call to Action
 7. The Opportunity to Support
- A key to effectiveness is to personalize each of these Case elements to the specifics of your project, your circumstances, your community and your target donors

Economic Benefits Aspect of a Case

- Many are probably less familiar with economic impact analysis as part of a children's museum Case
- Consider adding project **economic impacts** to your case in addition to the community and social benefits, particularly in the current economic climate
- An economic impact evaluation is a useful tool for explaining the economic benefits of the children's museum to the community

Why Economic Impact Analysis?

- As a destination attraction that brings in tourist dollars and resident spending to the local and state economies, children's museums can have a substantial impact on their economic bases and fiscal revenues
- Governmental, institutional and philanthropic leadership often place considerable importance on the economic benefits of a potential project as well as its educational, cultural and community benefits
- Therefore having a sound analysis of such impacts is often an important component of a project's case and its development package

Economic Impacts are Measured For

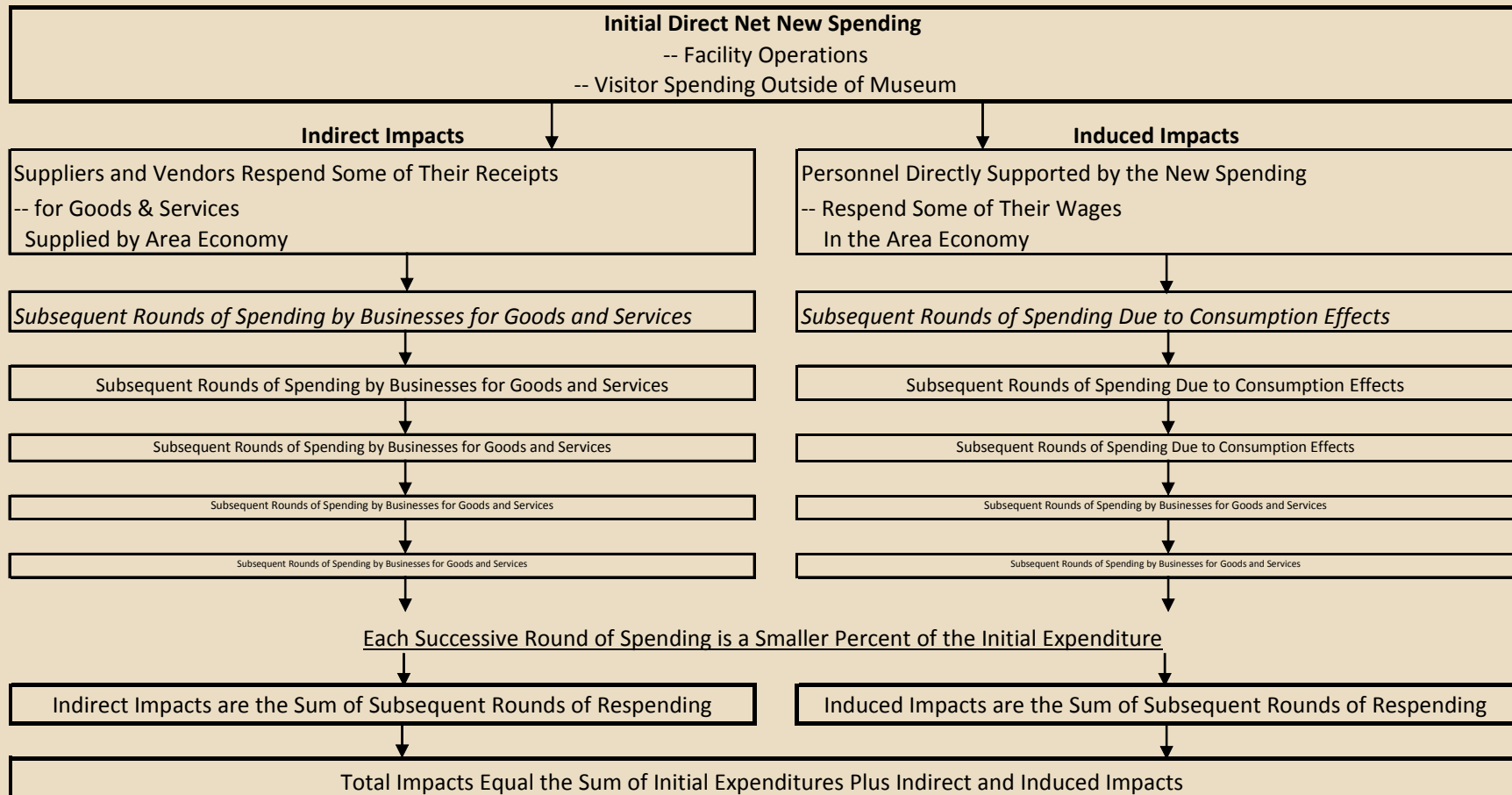
- One-time Economic Impacts and Fiscal Revenues due to project construction (for new construction or expansion)
- Annual Economic Impacts due to the museum's ongoing operations and spending by its guests
- Economic Impacts analysis applies to new museums, expanding museums and ongoing operations

Economic Impact Measures

- For new museums, expanding museums and ongoing museum operations, Economic Impact measures:
 - Expenditures (sales)
 - Jobs (at museum, outside museum)
 - Salaries and Wages
 - Tax Receipts
 - Indirect Community Benefits

Diagram of Economic Impacts

Diagram of Economic Impacts Process of a Museum



Inputs to Economic Impact Analysis

- Project capital cost for new facilities
- Attendance- potential or actual
- Source of attendance, residents /tourists
- Local market data
- Operating plan / financial pro formas / operating budgets
- Multipliers, to measure indirect and induced spending

MCM Economic Impacts

- Miami Children's Museum has been open 5.5 years
- Admission & revenues have continually grown and changed -with a slight dip in 3rd year of operations
 - Memberships have increased 22% over last year
 - Admissions have increased 3% over last year
 - Donations declined 36.7%
 - Special Events income declined 12.8%
 - Government grants declined 10.2%

MCM Economic Impacts

- Expenses are closely managed and have declined over past 3 years, fy09 expenses were cut 8.6%
- Pro-active in expanding revenue centers
 - ▣ Education program income declined 9.8 % due to a estimated 15% decline in field trips and a 31% decline in birthday parties
 - ▣ but early childhood classes, camps and the new DCF Licensed Early Childhood Institute have steadily increased in participation & revenue
 - ▣ MCMCS currently has 178 students in grades K-2, and will expand to include a 3rd grade with 37 students
- MCM is established as a component of tourism economy and local economy and creates economic impacts for Miami

Presenting Your Case for Support

- Printed
- Graphics and Images
- Simple messages
- Emotions and facts
- Supportive actions reader can take
- Personalized approach

Getting the Most From Your Case

- Use as a unified “script” for all project representatives – everyone is “on-message”
- Personalize to audiences
- Use formally
- Use informally
- Excerpt from Case as needed
- Evolve Case with your project

How to Respond to Questions

- Do your homework
- Be confident in the work done to date
- Refer them to the answers in the Case
- Recognize that the project is still being formulated
- Acknowledge if you don't know, and get back to them
- Let them know the organization will address the issue if it has not been answered yet
- Ask them to help answer the question
- Acknowledge that the project is still evolving

Summary

- A case statement is designed to attract people to support your children's museum, and therefore it is critical to fundraising and community support
- An economic impact evaluation of your children's museum can be a useful tool for explaining the economic benefits it provides or can provide to the community
- How the case for support evolves and how it is used and presented is essential to museum success