



2021-2023 Development Strategic Plan

PURPOSE: This plan has been developed to operationalize the organization’s strategic priorities, specifically addressing Development’s role in establishing Financial Sustainability by securing financial resources to support short- and long-term organizational initiatives that secure our foundational pillars: The Arts, People and Building. This plan includes objectives that also support the strategic initiatives to be “Arts Centered” and “Maximize Resources” to ensure our activities are mission-based and steward contributed funds responsibly.

Strategic Charges	Threats	Opportunities	Key Demographics
<ul style="list-style-type: none"> Rebuild reserves decreased during Intermission for near-term org stability and to meet Structural Agreement requirements with City of Madison Cost containment is essential, paired with strategic resource growth Balance short- and long-term needs in building charitable support for the org by growing new donor relationships and nurturing existing donor relationships Aging building requires long-term investment supported by a measured replacement plan and building sustaining resources (capital fund/endowment) 	<ul style="list-style-type: none"> Ticket donations will not continue in volume post-reopening Patrons will gradually return to leisure activities and reduce giving levels seen during COVID Patron confidence to return to the center will take time Not all people and businesses will recover financially at the same time, although others grew during this time State and federal support for the arts will likely return to pre-COVID levels (huge decreases) Overture will not continue all community programs; this can also be an opportunity 	<ul style="list-style-type: none"> Changes likely to charitable giving tax laws DAFs hold \$121B in the US Special events do not need to adhere to old models Fall re-opening provides opportunity to set a new fundraising cycle to leverage year-end gift planning Overture ticket buyers are more likely to make a donation with purchase than at peer institutions Shows will be announced in stages versus once in April increasing opportunities to ask Business matching gift programs under communicated 	<ul style="list-style-type: none"> 311 new donors since March 2020 to engage InBusiness 40 Under 40 alumni report states 41% interested in music/theater, \$308K median salary and \$2.5 median net assets Volunteers are no longer required to make a donation; likely to consider annual and planned giving Major gifts are defined as \$5K/year (annual or pledged); major gift work will focus on people who give \$1,500+ and have the interest and ability to engage further Those who give via DAF or IRA Gifts with ticket purchase Subscribers, multi-ticket buyers not currently giving

Development Mission: To create a culture of philanthropy that celebrates the role philanthropy plays in our organization and engage donors in ways that are meaningful to them.



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Development Team Orientation: The Development Team works collaboratively with the programming and marketing teams on Patron/Donor Loyalty strategies and Audience Development strategies to expand the reach of our mission. It also works closely with Operations, Event Services and Ticket Office to support an excellent experience for all. Aside from good strategic practice, the financial impacts of the COVID-19 Pandemic require Development to work with other departments to maximize communications, programs and shows for donor acquisition, cultivation, engagement and stewardship in place of creating separate events and activities. Inter-departmental projects and planning teams support this synergy.

Board Orientation: The Board of Directors and Development Committee are an extension of the Development Team – enhancing strategy, evaluating program effectiveness and being an ambassador for Overture by inviting new people into the mission, expressing gratitude to donors personally and generating excitement for the mission and programs. Staff and board members work collaboratively to advance strategic priorities of the organization as they relate to development.

Overall Strategic Goal: Continuously improve the donor experience by facilitating clear, easy ways to support the organization that both support the organization’s and donor’s goals.

Strategy / Objective	Action Steps	Timeline	Measurables/KPIs	Key Staff	Budget Effects
Fundraising Breadth - engage patrons more deeply in the organization through donor benefits to elevate their experience an encourage consistent annual support.	Broadway Club, Multi-Tix and Lapsed Donors - spring micro-campaign to encourage first time gifts focusing on elevating experiences via donor benefits.	April 2021	# of new donors, \$ of gifts	Cayla	\$5,000
	"Round Ups" - easier donation path and tiered ask in ticket transaction path and personalized donation receipt.	April 2021	# of new donors, \$ of gifts	Cayla	none
	Birthday Club - create a sense of community and celebrate milestones with donors. ID donors for specific age-related giving options. (such as IRA)	September 2021	# of participants and donor retention of this group	Jenni	\$5,000
	Business Matching Gifts - invest in technology in donation path to help donors know if their company matches giving.	January 2022	# of donors, \$ of gifts	Cayla	\$5,000

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	Partner with InBusiness 40 Under 40 - a shared strategy in marketing to engage this demo due to financial capacity and stated 41% interested in arts.	January 2022	partnership established with KPIs related to attendance and engagement per shared goals and activities	Heather/Beth	\$5,000
	Communications - continue to tell mission and gift impact stories and express gratitude, focusing on how Overture improves individual lives through the arts	Ongoing	Click throughs on blog, newsletter, social media, appeal \$ performance	Shari	none
	New donors during Intermission – personal outreach to encourage participation in donor benefits	September 2021	New donor attendance (donor lounge, tours, cast lunches, meet & greets)	Jenni	none
	Recurring Gifts - launch online recurring gift service and market in renewal communications.	April 2021	# of donors, \$ of gifts	Cayla	none
Fundraising Depth - create meaningful engagement, recognition and stewardship opportunities for major givers (\$5,000+ per year, incl. multi-pledges) to encourage annual and long-term support of our mission and center. Cultivate relationships with those giving \$1,500+ annually who also	Volunteers - identify strategies to support \$5K+ giving and planned gifts in partnership with Volunteer Services (Annual giving co-strategy opportunity)	Plan implemented by May 2022	\$ raised, # of donors	Judy	\$5,000
	Institutional Giving - differentiate cultivation/benefits, recognition and stewardship strategies in this segment.	Program in place July 2021	\$ raised, cost savings, retention	Beth	none
	DAF/Trusts - ensure donors behind the gifts are properly acknowledged, engaged and cultivated for planned gifts. Include DAFs as a method of payment.	Program in place July 2021	\$ raised, # of donors, retention	Judy	none



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have the financial capacity and interest in moving into the \$5,000+ level.	Donor Benefits/Cultivation - maximize benefit structure to cultivate relationships in place of additional fundraiser/cultivation events, formalize \$5K+ stewardship and recognition.	\$5K recognition plan in place July 2021	\$ raised in upgrade campaigns, growth in annual gift tracker segments, donor retention	Emily	\$50,000
	Stewardship Event -include individual, Corp, foundation and ALC in Take the Stage; sunset other events.	"Reopening" special event access 2021, New format Sept 2022	attendance, cost savings, retention	Beth	\$30,000
Overture Forever Campaign - secure \$30M cash and planned giving support for the near and long-term care of the building.	Silent phase quietly building awareness among key demographics. Anderson Legacy Circle activities support the campaign.	Currently underway	\$ raised, donor feedback	Emily and Judy	\$5,000
	Public phase sharing campaign goal widely.	January 2022 at the earliest	\$ raised and # of donors	Emily	\$50,000 (total)
	Cabinet led salon events to expand circle.	January 2022	\$ raised and # of donors	Emily	\$10,000 (total)
	Campaign completion celebration	Hopefully before or in 2027	Met \$30M goal	Emily	\$15,000

Fundraising Cycle Adjustments: Based on the successes of the Intermission Campaign as well as the strategic decision to announce Overture Presents performances 3-4 times during the year to support Overture and Promoter ticket sales (versus only in April for the following season), the following adjustments are recommended:

- Invite Anderson Legacy Circle, Corporate Partners (\$2K+) and \$2K+ donors to Take the Stage in September to kickoff the new season and share the impact of their gifts as compiled in the Annual Report. Sunset Anderson Legacy Circle and Corporate Partners stewardship lunches.
- Move “spring match” to the fall to leverage inclusion in end-of-year gift planning. Use Annual Report for *mission impact* messaging and offer End of Year Gift Planning on-line seminars.
- Encourage ticket buyers to “*elevate their experience*” by becoming donors to receive donor benefits when season segments announced.
- Continue to host behind the scenes tours and education programs (such as OnStage) as stewardships and engagement opportunities.
- Encourage donors to “bring a friend” to donor benefit experiences to expand circle of like-minded people.



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- Hold 1-2 corporate cultivation events with DMI, Madison Chamber, Black Chamber, Latino Chamber, LGBTQ Chamber, InBusiness Magazine with a pre-show event and discounted ticket option.

Month	Current Fundraising Cycle	Recommended Fundraising Cycle (starting July 2021)
July (fiscal year start)	Renewals	Winter Show Sponsorship, Renewals, Planned Giving Message
August	Renewals	Local Legends Stewardship, Winter Show Sponsorship, Renewals
September	Annual Report, renewals, Planned Giving messages	Take the Stage (with Anderson LC and Corporate Partners), Annual Report, Overture “Reopening”, Renewals
October	Corporate Partners Lunch, renewals	Fall Fundraising Match: Community Impact Messages, Acquisitions and Renewals, End of Year Gift Planning Seminar, Sponsorship
November	Calendar Year-End, renewals, upgrade	Fall Match, Acquisitions, Renewals and Upgrades, Sponsorship
December	Calendar Year-End, renewals	Fall Match, Broadway & Sponsorship, Renewals
January	Season Sponsorship, renewals	Broadway & Sponsorship, Renewals, Planned Giving Message
February	Season Sponsorship, renewals	Renewals, corporate cultivation event
March	Season Sponsorship, Local Legends Stewardship, renewals	Renewals
April	Match Launch paired with Season Announce (April-June), renewals	Fall Season/Broadway Announcement with Acquisition Appeal: Elevate your experience with donor benefits, sponsorship, Planned Giving Seminar: 10 Essential Legal Documents
May	Match, Anderson Legacy Circle (ALC) Stewardship lunch, renewals	Acquisition Appeal, Upgrades, Renewals, sponsorship
June	Match, Take the Stage, renewals	Renewals

This timeline and strategy adjustment holds several benefits:

- Maximizing resources and promoting the mission by aligning donor cultivation and stewardship with existing arts-centered activities.
- New season promotion timeline allows show sponsorship to occur throughout the year, providing more opportunities for businesses to opt-in based on show interest and budget timelines. When layered over grant deadlines and reduced independent corporate events, this workflow may allow one “Director of Institutional Giving” in place of the Director of Corporate Partnerships and Grants Manager positions.
- Designates two distinct messaging campaigns reflecting arts donor motivations: access via donor benefits and community impact.
- Patrons will continue to be encouraged to include a gift with purchase starting Spring 2021, however, the match will be held in the fall when building reopens and people can feel the joy of the arts again. Share how the Intermission Campaign bridged closure to reopening before we ask for more.
- September 2021 reopening event (TBD) can have a “donor-only experience” to celebrate them and kickoff the new Take the Stage timeline.