World Affairs Council of Philadelphia
Final Report | Campaign Implementation and Staffing
June 19, 2019

Project Team:
Kathleen Watson
Theresa Leinker
Karly Forman
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Schultz & Williams is a consulting firm that provides comprehensive strategies – including development, direct response, interim staffing, planning and marketing – to nonprofits of all types and sizes across the nation.

Since 1987, the success and integrity of our work and of our team of seasoned experts have been driven by one simple philosophy: development, management and marketing strategies must be fully integrated in order for organizations to achieve financial stability, operational excellence and, ultimately, their mission-related goals.

We are committed to providing support and services to nonprofits that work every day to address and influence quality of life issues around the world. Through the collective energy and experience of our team members, we embrace our clients’ causes and pursue resources needed to help each organization reach its full potential.

Schultz & Williams is a national firm headquartered in Philadelphia.
Introduction

Schultz & Williams (S&W) appreciated the opportunity to work with the World Affairs Council of Philadelphia on the campaign for its 70th anniversary. Marking this milestone with a fundraising campaign was consistent with the celebration of the 50th and 60th years, and today, as the Council has expanded to provide more broad programming, education, travel and now a television series, this campaign served as an opportunity to raise funds for both operational expenses and the Council’s endowment.

S&W’s work included a brief, but comprehensive discovery phase, campaign implementation and staffing, and ongoing campaign counsel.

Prior to S&W’s engagement, consulting firm Fairmount Ventures provided a development plan, including the creation of a Fundraising Task Force, to help guide the Council’s work and ready the organization for this campaign.

A summary of the campaign implementation and staffing work is included here as Appendix A. All materials relevant to the campaign work are identified within that summary and included here as Appendices B – G.

Acknowledgements

S&W would like to thank Craig Snyder, President and CEO, for his leadership and attention to this project, and Margaret Keenan, Vice President of Development and Membership, for her highly organized approach and dedication to the Council’s donors and members. Finally, we are grateful to the World Affairs Council Board of Directors, in particular Michael Farrell, Chairman and John Walsh, Campaign Chairman; and the members of the Fundraising Task Force, for their commitment to this effort.

Campaign Results

Fundraising

As of June 14, 2019, funds raised through Rising to the Occasion total $1.82 million. A full financial report and the donor list are included as Appendix I.

We believe the campaign’s success can be attributed to the strong teamwork of the Council, volunteer leadership and staffing; in particular:

- The leadership of the President & CEO, who was persistent and fearless in solicitation;
- The Council’s Board of Directors, who led the campaign in generosity;
- The Council’s long-standing relationships with affluent members who deeply value the organization’s work, who gave significantly; and
The campaign serving as a compelling ask for the largest gift many donors had ever given to the Council.

Next Steps to Conclude the Campaign

To complete the campaign successfully, the Council should:

- Complete follow-up on all outstanding asks by December 2019.
- Include a compelling campaign ask of members in the annual appeal – with campaign-specific messaging and a unique look and feel – to members during the fall through year-end season.
- Announce campaign results at the September event hosting Condoleezza Rice, the fourth and final in the campaign’s signature programming. Recognize donors at this event and begin to implement all naming recognition going forward.
- Send a customized “insiders” message or mailer to campaign donors to celebrate the project’s completion.
- Prepare a final campaign analysis on donors, gifts, naming recognitions, key findings and next steps for presentation to the Board of Directors.

Recommendations

Campaigns test an organization’s capacity, infrastructure and staffing and often lift donors’ expectations for fundraising and recognition going forward. During the planning phase of this campaign, staff and Board leadership raised thoughtful questions around the Council’s status as a membership organization; how to continually attract new members and reach a more diverse audience; how to adapt to consumers’ changing needs about membership associations; and how to create a more sustainable event model. We offer the following recommendations for your consideration as the Council seeks to grow from its current state.

Organizational Structure

Following the successful conclusion of this campaign, we recommend the Council:

1. Grow and expand the membership model of the organization to build an organization that also meets the needs of today’s donor: providing visible and data-driven impact, and the opportunity for greater donor engagement and recognition.

2. Review all communications to strengthen the Council’s position as a philanthropic objective; with so much of the annual budget coming from
contributed revenue, there should be an increased focus on donors and fundraising. For example, there is no way to make an annual gift to the Council outside of membership on its website.

3. Tackle the planning issues that result in a short lead time for events, which greatly prohibits the ability to leverage these world-class speakers and topics for fundraising and sponsorship purposes.

4. Expand the development team to include a staff member fully dedicated to fundraising and donor engagement, with an additional staff member focused on increasing and serving membership.

**Development Program**

We recommend the Council’s development team craft a three-year fundraising plan to grow revenue and diversify the funder base by launching more donor-specific strategies and communications. Professional fundraising is a cycle of action that helps bring prospects and donors increasingly closer to your organization, feeling more invested and more passionate about contributing. The success depends on the strength of the relationship, as well as the value your organization provides to the donor: delivering on impact and results, meeting communication and recognition expectations, etc. This is a shift from the member or sponsor relationship, where money is given in order to receive an explicit benefit in return.

Aspects of the fundraising cycle that should be included in the development plan for each type of funder are:

To diversify the revenue stream, we recommend the plan include strategies for:
1. **Corporations and Partnerships**
   Already, the Council enjoys strong support from corporations, currently the largest funder type in annual membership. And, its affiliation with the Satellite Institute has been effective, connecting the Council to area businesses already seeking to make long-term commitments to non-profit organizations. The development plan for this area of funding should focus on how corporate needs may be changing; how more strategic partnerships could be developed with each to offer a stronger value; and consider additional partnerships with agencies like the Satellite Institute that might produce increased results.

2. **Foundation Support**
   Identifying foundations that support missions in keeping with the Council’s civic engagement and education work should be a key priority for the Vice President of Development and Membership and for the development team. Currently, grants are submitted by the Education staff for education-specific funding. We believe there is greater potential if this fundraising function is moved to Development and a higher priority is placed on this identification and solicitation. If staffing time is an issue, this work is often outsourced to a grant writing professional, which may be an option for the Council especially as you test the program.

3. **Annual Giving and Major Gifts**
   The Council continues to attract affluent leaders in the Philadelphia region and has a substantial base of members with wealth and the capacity to give. The Council could:
   
   a. Institute a Giving Society to better invite and recognize annual donors, perhaps with a contribution added to membership fees.
   
   b. Build the annual year-end appeal with higher-quality packaging, a compelling message from a student or member on the impact the donor’s gift will make and complementary, tailored digital efforts. Alternatively to the year-end appeal, because membership renewals are on a rolling basis, consider a personalized appeal at the six-month mark following each reinstatement or new sign-up, instead of at year-end.
   
   c. Adapt campaign naming opportunities to be marketed as part of an ongoing major gift initiative.

4. **Planned Giving**
   The Council benefits from the generosity and support of several long-standing members for whom this work is attractive especially as part of a legacy gift. Planned giving offers a way to also build the endowment, a critical aspect of
financial security for the Council. We would recommend the following to position planned giving following this campaign:

a. The Board should formally decide how bequests and estate gifts will be used at the Council (endowment vs. operations) and craft a policy on how these decisions will be made when a donor does not expressly indicate a direction of funds.

b. If it does not already have such a policy, the Board should develop and approve an Endowment Fund policy that outlines types of endowment, management and investment policies and annual spending policies.

c. The Council should establish a planned giving society to recognize all donors who have made a formal intention to leave an estate gift to the Council. The amount of the gift need not be disclosed and should not be recognized; simply the intention is enough to be included in the society. The society may be named for a prominent figure or donor in the Council’s history, for a value associated with the Council’s work, or simply “The Legacy Society,” etc.

d. Materials (brochure) and a website page should be created to communicate the unique position of the society and its donors. The messaging used to secure planned and endowment gifts focuses more on long-term values (legacy, civil discourse, civic engagement, non-partisan values, democracy) and less on today’s priorities.

First steps for the Council to begin a planned giving program might be:

a. A personal letter to each member of the Board of Directors introducing the society and asking to be notified if the Council is included in the member’s estate planning.

b. An invitation to Board members to contact the Vice President of Development and Membership to begin a conversation about planned giving if he/she would consider including the Council in his/her estate planning.

c. A letter to donors or members who have been involved at the Council for some number of years – perhaps 20 or 30 years, depending on the membership list – introducing the society and inviting recipients to join.

d. Personal conversations with appropriate members and donors with an invitation to include planned giving in his/her estate planning.

5. Fundraising Task Force
The Council is fortunate to have the commitment of many talented executive
volunteers who serve on the Fundraising and Branding Task Force teams. We recommend refining the purpose of the Fundraising Task Force to serve as the primary volunteer fundraising team, reporting to the Board of Directors and meeting regularly to attain specific fundraising goals as defined by staff.

   a. The Vice President of Development and Membership should serve as the primary staff liaison for this team.

   b. This team should be comprised of volunteer leaders who are deeply invested in the mission of the organization, well-connected in the community and willing to serve as ambassadors for the organization.

   c. The team should include Board members, but also expand to include more non-Board members. The role of a committee or task force member can often be a good training ground for a prospective Board member.

   d. The role and activities of the Fundraising Task Force should be:

      i. To understand, define and support specific annual or corporate fundraising goals;

      ii. To secure personal or corporate funding toward these goals;

      iii. To host events and “friendraisers” on behalf of the Council, introducing new groups of people to the organization;

      iv. To lead the Board and support the staff in development matters.

6. **Fundraising Marketing:** The Council enjoys an updated website since the start of the campaign, and an effective partnership with Buchanan Public Relations firm. The majority of the marketing and communications focus on the membership audience, events and the education programming. The Council should:

   a. Build out the website to reflect additional offerings for donors, such as a donor spotlight to highlight the giving of both individuals and foundations; the planned giving program; what impact a donation makes, etc.

   b. Include donor stories in communication pieces like the digital newsletter, which regularly shares upcoming events, travel offerings and clips of the Council in the news. Showcase how a donor makes an
education event possible or tell the story of a student or school that benefited from a program that Council donors made possible.

c. Utilize program staff for donor meetings, tours and events. The Council has a staff of bright, talented experts who convey the organization’s mission and work well.

d. Provide more ready access (online or print) to information donors care about: annual financial forms, an impact statement, data on people and students served, etc.

e. Look at the marketing potential of partner organizations and schools; for example, most schools have social media and would consider including Council programming as a featured post.

f. Develop thoughtful, strategic partnerships for corporate members: pro bono marketing or PR work as part of opportunities that connect businesses to people important to them, from political leaders and newsmakers to students who will soon serve as interns and employees.

Conclusion

It has been our sincere pleasure to be a part of the Rising to the Occasion campaign for the past 14 months. We are very pleased to see the successful results thus far in the campaign and look forward to celebrating with you at the completion of the effort.
Appendix A

Summary of Activities
World Affairs Council | Campaign Implementation & Staffing

June 2019
Campaign Implementation and Staffing

At the start of 2018, the Board of Directors of the World Affairs Council of Philadelphia approved a fundraising campaign to mark the organization’s 70th anniversary, in keeping with campaigns launched in celebration of the 50th and 60th anniversaries. The Board of Directors and staff leadership set an initial $2 million goal for the campaign. The Board of Directors and staff leadership also determined that members of the Fundraising Task Force, chaired by John Walsh, would serve as the campaign committee.

S&W was retained by the World Affairs Council in March 2018 to provide support for a fundraising campaign to mark the organization’s 70th Anniversary. S&W’s work began with a brief discovery period consisting of:

- Structured interviews with a selection of staff, Board and Council members
- Materials Review
- Campaign Activity/Progress-to-Date Review
- Philanthropic Capacity Screening of donor records provided by the Council

It was important to staff and Board leadership that campaign staffing be focused on the targeted and rapid deployment of campaign activities, primarily focused on prospect identification, qualification and cultivation, and provide the full spectrum of campaign implementation services.

Interviews

S&W Senior Consultant, Theresa Leinker, conducted seven (7) interviews with staff members, Council members and members of the Board of Directors, some of whom also served as Fundraising Task Force members. Interviewees were:

- Denise Bala, Vice President of Education, World Affairs Council
- Hayley Boyle, Vice President of Programs, World Affairs Council
- Michael Farrell, Chairman, Board of Directors
- John Walsh, Chairman, Fundraising Task Force
- Jaime Pludo, Board of Directors
- Peggy Leimkuhler, Board of Directors
- Andrew Szabo, Council Member

In preparation for these interviews, S&W prepared the discussion guide, gift table and initial case statement. The guide and gift table are included here as Appendix B and Appendix C, respectively. The unattributed compilation of responses to these interviews was provided to the Council at the conclusion of the interviews.

Key findings from these interviews included:
Respondents commended the Council for its high-quality work, strong reputation and contributions to civil discourse;

Respondents valued the Council's events and impact in education and felt a need for this type of programming now more than ever;

Respondents were supportive of a fundraising campaign and the majority would expect to participate;

Respondents wanted more clarity around how funds raised would transform the work of the World Affairs Council;

Board members in particular wanted additional information on the Council's future plans –
  o Whether the current event-based membership model is sustainable;
  o Whether a campaign to fund ongoing operational needs would be effective long-term; and
  o Whether a larger endowment would provide a more effective route to financial stability for the Council.

Campaign Work Plan

With this feedback, S&W developed the major elements of a campaign plan to serve as a guide for staff and volunteers, including:

  • Refined case for support, introducing the campaign name (Rising to the Occasion: The Campaign for the World Affairs Council of Philadelphia) and naming opportunities (Appendix D).

  • A set of campaign materials including pledge forms, acknowledgement letters and other templates (Appendix E).

  • A campaign gift table populated with prospects identified for each gift level.

  • A detailed timeline for prospect meetings, cultivation events and campaign financial milestones (Appendix F).

  • An internal tracking document to manage all prospects and solicitation meetings (Appendix G).

  • Naming opportunities to serve as recognition vehicles for campaign gifts (Appendix H).

S&W provided the following work as part of the campaign implementation and staffing
engagements:

Prospect Cultivation

- Developed and refined targeted prospect pipelines and designed cultivation and solicitation strategies to actively engage top prospects.
- Advised on the submission of new corporate and foundation proposals.
- Staffed the President and CEO, Vice President and campaign volunteers for meetings with campaign prospects, helping to identify individuals to target, providing background materials and conducting any necessary follow-up.
- S&W Senior Vice President Kathleen Watson conducted training for major gift solicitation to staff and volunteers.

Campaign Communications & Stewardship

- Worked with senior staff and Buchanan PR to craft communications, including case statement and media opportunities throughout the campaign.
- Developed plans for cultivation events and other milestone activities.
- Manage all campaign naming opportunities and campaign-ending recognition.

Campaign Management

- Planned and staffed campaign meetings, including the preparation of meeting agendas and supplemental materials.
- Actively managed the campaign timeline.
- Managed the current prospect pool, setting priorities for engagement/solicitation and ensuring coordination among staff and volunteer solicitors.
- Wrote briefings for staff and volunteers to prepare them for prospect meetings, conducting in-depth prospect research as needed.
Appendix B

Interview Discussion Guide
World Affairs Council | Campaign Implementation & Staffing
1. In general, what is the image of the World Affairs Council among members/donors? To the public?

2. How broadly understood is the mission of the World Affairs Council? By you? By others?

3. Describe the Council’s brand and distinct qualities that distinguish you from other similar organizations.

4. What are the main needs for the Council for the next 5-10 years?

5. How can you message these needs to donors in a compelling way?

6. In your opinion, why do donors choose to give to the World Affairs Council?

**Fundraising Program**

7. What are your impressions of the current fundraising program at the World Affairs Council?

8. What is the average donor profile for the Council?

9. How are major gift prospects identified for the Council? How are they cultivated?

10. Does the current staff have the ability to lead and manage this capital campaign in addition to the organization’s ongoing activities? What other resources, if any, might be needed?

11. Do you perceive that the World Affairs Council is efficiently run? Please explain.

12. How well does the Council communicate with donors and prospects? How would you describe the Council’s communications?

**Case for Support**

13. Do you think the case for support for the World Affairs Council, as outlined in the materials you received, is: (Compelling, Good, Weak, Suggested Improvements, Other/Didn’t Read).

14. Which element of the case for support is most compelling to you, or could be to other donors? Why?

15. How could the case for support be strengthened?

16. What is the strength of the Council’s case for support? Why would this be compelling to donors? To you?

17. Are there any reasons that donors would not support the Council?
Fundraising Potential

18. Do you think raising an additional $2 million is achievable over the next 2 years for the Council? (Yes, No, Not Sure, Other)

19. Would you (or your family/organization) support this campaign?

20. What level of support do you think you (your family, business, foundation) might commit to the initiative?

21. Who should serve as volunteer leaders for this campaign?

22. In your opinion, what will it take to make the Council a more significant philanthropic choice for donors?

23. How does the Council rank among your philanthropic priorities? (Top Priority, Top 3 Priority, Important but not a Top Priority, Not a Priority).

24. Are there any issues that haven’t been discussed that represent either threats or opportunities for the Council’s fundraising efforts?

25. Do you have any other comments?
Appendix C

Gift Table

World Affairs Council | Campaign Implementation & Staffing
### World Affairs Council
$2 Million Campaign

#### Proposed Gift Table

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$2,000,000
Appendix D

Case for Support
World Affairs Council | Campaign Implementation & Staffing

Schultz & Williams
1617 JFK Boulevard
Suite 1700
Philadelphia, PA 19103
215.625.9955
schultzwilliams.com
Investment with Impact

In a tumultuous time in our history, the World Affairs Council of Philadelphia will do what it has always done: rise to meet the challenge. Campaign gifts will secure our work through the next decade to promote civil discourse, and the exchange of ideas for students and adults across our region.

We know this work is important to you, too – and that you’ll want to be part of securing the Council’s place in the conversation for years to come. Campaign donors may establish new program funds, support our vital work in the schools, or make an unrestricted gift that will undergird our ability to fulfill our mission. The Council welcomes both gifts for current programming and endowment gifts that will provide a permanent foundation for our work.

You are a partner in our mission. You know firsthand the impact of this work. You know what a critical time this is for our nation.

We invite you to stand with us in our shared belief that

“Democracy Demands Discourse.”

www.wacphila.org
Celebrating 70 Years of Informed Discourse & Debate

At the World Affairs Council of Philadelphia, we offer a non-partisan platform for informed discourse and debate. For seven decades, we've provided our members and the greater Philadelphia community with access to influential world leaders, exposure to different cultures and viewpoints, and first-hand insights into critical topics.

We're growing. And we invite you to join us and help us meet our mission.

This is an exciting time for the World Affairs Council. We've launched a $2 million campaign – Rising to the Occasion - to mark our 70th Anniversary and ensure our organization can meet the needs of our city and our nation's citizenry. The Campaign will advance our podium programs, expand educational outreach for youth, and build long-term stability.

This campaign will ensure the World Affairs Council of Philadelphia's legacy and the vitality of our mission – at a time when our work has never been more relevant and necessary.

IDEAS THAT SHAPE THE WORLD

Since our founding in 1949, the Council has hosted more than 5,000 prominent speakers at events that have reached more than 500,000 community participants, forging a continuous dialogue between policymakers and the public.

Today, nearly 500,000 regular viewers watch each episode of The Whole Truth, our television show hosted by David Eisenhower, which highlights the critical issues of the day and reaches more than 60% of United States households.

We've grown from reaching thousands of people, to reaching millions.

Our educational programming instills the skills, knowledge, and sensibilities students need to live, work, and thrive in a rapidly evolving, interconnected world.

• 2,100 students from 80 public, parochial and charter schools participate in our global literacy programs annually.

• 500,000 middle and high school students have participated in our highly relevant educational programs—from Model United Nations to Global Economic Forum for High School Students.

• 500 students enroll annually at Bodine High School for International Affairs, the nation’s first public/private partnership subject-matter focused high school, named a Blue Ribbon School by the U.S. Department of Education. The Council co-founded Bodine with the School District of Philadelphia in 1980 and remains critical to its day-to-day work and success.

In the past five years we've extended our scope and impact. Our annual operating budget has increased 60% as we've expanded programming:

• We started the Global Smarts Mentoring Program to make sure students from low-income Philadelphia schools can compete on the same playing field as other students. This rigorous tutoring program pairs students with college-level mentors from St. Joseph’s University – and these students are now out-performing every expectation in our global literacy programs.

• We filled the funding gap for Bodine High School for International Affairs when School District funding was no longer an option for this extraordinary school.

• We founded the Stan and Arlene Ginsburg Family Foundation Great Debates series to introduce a platform where balanced dialogue takes center stage, bringing our legacy of civil discourse to a new level, at a time in our nation’s politics when such discourse is critically needed.

• Our best-in-nation educational travel program has grown by 40%, now taking travelers to half the nations in the world each year.

• The Council was awarded its first grant from the Commonwealth of Pennsylvania to pilot the Global Scholars Certificate, a three-year program to integrate global content, critical thinking, and investigative skills into high school curricula across the entire state.

• The Council expanded its student programming to bring high school global literacy initiatives to New Jersey students.

We are proud of the quality and relevance of our speakers program and the life-changing impact of our work with young people. But one thing is clear—the Council cannot sustain this level of impact without new philanthropic support.

Rising to the Occasion is an extraordinary effort to fund long-term growth and development, ensuring the legacy of the Council as a jewel in the crown of civic Philadelphia. With a goal of $2 million, Rising to the Occasion will underwrite two key priorities:

PROGRAMMING INVESTMENT FUND

Designed to maintain the highest quality programming, this operating fund of $1.5 million ensures that the World Affairs Council continues to be the place where world leaders come to share important ideas. The Programming Investment Fund is a promise that the Council will continue to attract the very best, brightest, and broadest perspectives on national and international issues. We will leverage our 70th Anniversary year to recruit speakers of international prominence to bring their global perspectives to the Council, its members and regional leaders. Through this fund we will also expand our internal resources to meet the growing needs of our audiences: upgrading technology, launching a new website and investing in marketing – initiatives designed to more effectively promote our programs, serve our members, and sustain the Council for years to come.

YOUNG CITIZENS FUND

An investment in youth served by the World Affairs Council is an investment in a more worldly, understanding, and engaged generation of informed citizens and voters. We aim to direct $500,000 toward the expansion of our programs for middle and high school students in particular. With the funds raised from this campaign, we will increase the number of schools we serve through the Global Smarts program, with a particular focus on urban schools; and deepen engagement at all schools by increasing student participation by 50%.
Appendix E

Pledge Form

World Affairs Council | Campaign Implementation & Staffing

June 2019
Rising to the Occasion  
70th Anniversary Campaign  
Pledge Form

Donor Information

Name: ____________________________ Spouse / Partner Name if applicable: ________________________

Organization (if corporate/foundation gift): ________________________________________________________________________

Mailing Address: ____________________________________________ City / State / ZIP Code: ________________________________

Home phone: __________________________ Cell phone: ________________________________

Email: ________________________________

Pledge Payment:

I wish to pay by:

☐ Check (made payable to World Affairs Council of Philadelphia)
☐ Stock  
☐ Credit Card

Credit Card Information:

___ Visa  ____ Master Card  _____ Amex  ____ Discover  

Card #: __________________________________________________________

Exp.: ________________________  Security Code: ______________

Pledge Term:

☐ 1 year  
☐ 2 years
☐ 3 years

Installments will be made:

☐ Quarterly  
☐ Semi-Annually
☐ Annually

☐ Yes, my company has a matching gift program.

Recognition:

☐ Please do not recognize my gift publicly. I/We wish to remain anonymous.

☐ Yes, World Affairs Council may recognize my gift publicly.

Name as it should appear in materials:

____________________________________________________________________

(please include Mr./Mrs. if applicable)

☐ This gift is in honor/memory of ___________________________________________

Donor Signature: ____________________________ Date: __________________________

Second Signature if required: ____________________________ Date: __________________________

Please complete and return to: Margaret Keenan, Director of Development and Membership, World Affairs Council, One South Broad Street, Suite 2M, Philadelphia, PA 19107. Please call 215-561-4700, ext. 222, or email mkeenan@wacphila.org with questions.
World Affairs Council - Campaign Timeline

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April 11, 2018

Campaign Timeline:
- **March 2018**: Campaign Branding and Fundraising Task Force Formed
- **April 2018**: Conduct initial meeting of Campaign Committee
- **May 2018**: Board of Trustees approved campaign goal
- **June 2018**: Campaign support from S&W initiated
- **July 2018**: Campaign materials drafted
- **August 2018**: Board/Solicitor development and training
- **September 2018**: Development of individual, corporate, and foundation prospect list
- **October 2018**: Internal Interviews by S&W
- **November 2018**: Campaign materials finalized and produced
- **December 2018**: Secure at least (8) six-figure gifts and (12) five-figure gifts
- **January 2019**: 50% of Goal Met/Pledged
- **February 2019**: Development of prospect pipeline and solicitation plans
- **March 2019**: Cultivation events
- **April 2019**: Solicitations to top warm prospects
- **May 2019**: Develop “Insiders” strategy created to include campaign newsletter, impact report, e-blasts, travel and special events/dinners
- **June 2019**: Launch campaign “Insiders” communications and events strategy
- **July 2019**: 75% of Goal Met/Pledged
- **August 2019**: Continued acquisition of corporate, foundational and other gifts
- **September 2019**: 90% of Goal Met/Pledged
- **October 2019**: Formally announce campaign to general membership and public
- **November 2019**: Solicit general membership and public
- **December 2019**: Plan campaign stewardship and recognition programs
- **January 2020**: Ongoing meetings of Fundraising Task Force and the Board
- **February 2020**: Cultivation of newly identified individual prospects
- **March 2020**: Execute campaign stewardship and recognition programs
- **April 2020**: 100% of Goal Met/Pledged

Timeline phases:
- **Internal Planning Phase**
- **Campaign Preparation Phase**
- **Quiet Phase**
- **Public Phase**
Appendix G

Tracking Elements
World Affairs Council | Campaign Implementation & Staffing

When tracking campaign prospects, a master document was created to record all activity and next steps for each prospect. Information fields included:

- Prospect Priority
- First Name & Last Name
- Company/Organization
- Prospect Type
- Status
- Solicitor
- Prospect Rating
- Amount Pledged
- Fund
- Meeting Date
- Connection
- Ask Amount
- Amount Payable
- Notes
- Date Received
- Acknowledgements Sent
Appendix H
Campaign Naming Opportunities
World Affairs Council | Campaign Implementation & Staffing
Campaign Naming Opportunities

Programming Investment Fund

Draft ideas:

• Lecture Pass Series: $100,000 (10 years)

• Global Leadership Institute: $200,000 (4 years)
  Available to emerging leaders in our corporate members’ firms, the Global Leadership Institute is an effective way to build internationally-minded professionals by participating in this series focused on networking, community service and leadership development.

• Council Internship Program

• Annual Travel Brochure

• Atlas Award

• Name an annual, sector-specific program (healthcare panel, finance program, etc.)

Young Citizens Fund

Gifts to the Young Citizens Fund will be recognized by naming one of the following programs in honor of the donor or designated honoree. The duration of the recognition, unless otherwise noted, is five years from the date of the gift or pledge.

Education Programs named with a gift of $250,000 or more

• Jr. Model United Nations Conference
  A five-month program introducing middle school students to international affairs and cultural diplomacy.

• Cultural Diplomacy Conference

• International Student Summit
  An annual event simulating the most recent leaders’ summit of the Group of Twenty (G20), the international forum for economic, financial and political cooperation. High school students explore issues of globalization, automation and the shifting global economy, debating the topics and creating solutions to these complicated issues.

• Global Economic Forum

• Summer Global Leadership Seminar
Education Components named with a gift of $50,000 or more

- **Bodine High School Leadership Liaison**
  The John Lazarich Leadership Liaison at Bodine High School for International Affairs
  This staff position, named in perpetuity, secures the critical work of augmenting the school’s international curriculum with a variety of global affairs programming, in-class speakers, international student exchange programs and a diverse array of academic field trips and study abroad excursions.

- **Global Smarts Trip to the United Nations**

- **Global Smarts Mentoring Program**
  An innovative global literacy tutoring program that pairs college student mentors at St. Joseph’s University with middle school students from under-resourced and low- to middle-income Philadelphia public, private and charter schools. Through weekly individual and small group instruction, mentors prepare the students to confidently participate in the annual, region-wide Jr. Model United Nations Conference.

Participating schools:

- A.M.Y. at James Martin School  
  *The Joe and Ann Berquist Global Smarts Mentoring Program at A.M.Y. at James Martin School*
- A.M.Y. at Northwest Middle School
- Blessed Trinity Regional Catholic School
- Cook-Wissahickon Elementary School
- Gesu School
- Hope Partnership for Education  
  *The Michael and Lisa Farrell Global Smarts Mentoring Program at Hope Partnership*
- New Foundations Charter School
- Shawmont School
- St. Rose of Lima School
Appendix I

Campaign Financial Report and Donor List (June 2019)
World Affairs Council | Campaign Implementation & Staffing

World Affairs Council of Philadelphia
Final Report | Campaign Implementation and Staffing
June 2019
70th Anniversary Campaign
Fundraising Update
as of June 14, 2019

Total Pledges and Anticipated Receipts Schedule

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Donor Restrictions and Anticipated Receipts Schedule

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RISE TO THE OCCASION

Donor List

**Founder**
The Board of Directors of the
World Affairs Council of Philadelphia
The Sabina and Raza Bokhari Foundation
Buchanan Ingersoll & Rooney PC
Frank and Cheri Hermance
Independence Blue Cross
William F. and Leslie MacDonald and the
Mill Spring Foundation
Rutgers University - Camden
The Ryan Charitable Trust
Saint Joseph’s University,
Erivan K. Haub School of Business
Edward and Cyma Satell
SEI Private Wealth Management
The Thomas and Tracey Gravina Foundation
UGI Corporation

**Benefactor**
Brandywine Realty Trust
William and Susan Doran and the
Doran Family Foundation
The Stan and Arlene Ginsburg Family Foundation
The Paul E. Kelly Foundation
The John Lazarich Foundation
John L. and Patricia Walsh and the
Patricia M. Walsh Charitable Fund

**Patron**
Joseph and Ann Berquist
Michael and Lisa Farrell
KeyBank
Morgan Lewis & Bockius, LLP
Stradley Ronon Stevens & Young, LLP
Richard and Diane Woosnam

**Friends**
Jeffrey Adeli
Jim and Janet Averill
Paul S. Beideman
Jon and Frances Blum
Anne Buchanan and Jon Ericson
Linda and Don Caldwell
Linda and Tony Conti
Walter D’Alessio and Barbara Chance
John DeWald
Donald and Denise DiCarlo
Brian and Lauren Dietrich
Julie Eble and Bruno Ravalico
Matthew and Lori Espe
Pamela Fisk
Arthur and Susan Friedman
Timothy E. and Susan T. Gillespie
Arlin and Paula Green
David and Jacqui Griffith and the
McEwen Family Scholarship Fund at Modern Group Ltd.
Lisa Hale and Jim Haas

Robert and Denise Kane
Melanie Katzmann
Ralph Kendricks
Alan Kessler
Brian and Elizabeth Lee
Peggy Leimkuhler
Andrew and Jill Michal
Ram Mohan
Daniel Murphy
Jaime Pludo
Maureen Pugh
Brian and Soozung Rankin
Mitchell and Beth Sargent
William and Deborah Sasso
John and Eve Sauter
Michael and Bridget Subak
Susan M. Long and Andrew J. Szabo
Peter and Lisa Tucci
Jack and Kathy Warnock
Lee and Betsy Woolley