FORWARD

In the summer of 2009, the Center for Community Arts and Cultural Policy (CCACP) undertook an unusual task; that of creating a 'brand' and developing a communication plan as well as an overall look, and of creating a long-range funding plan to support the research work of the affiliated faculty. The center, currently supported through gifts from within the university, recognized that it would have to be independent at some time in the future so they chose to be proactive by launching this process before faced with the immediate need to raise funds.

I was fortunate to be selected to create the development plan and took on the task late in 2009. This document is the result of that work.

It is especially important to note that Patricia Dewey, CCACP Director, was clear in her directive that the development efforts in which CCACP engages be transparent to the university and its development staff. This document was created with the full approval of the Dean of Architecture and Allied Arts (AAA) and with input from the office of the AAA CDO, with Joseph Hunter advising and editing. The heads of programs within AAA are aware of the project as are the directors of other campus-based research centers. Additionally, the Office of Research, led by Rich Linton, was advised when the effort began and has been informed of its progress.

Faculty affiliated with the center were involved in early discussions of this project, have been regularly informed as to progress, and were interviewed by me with much of their ideas included in the planning. Alumni from the Arts and Administration program were also interviewed as were several community leaders.

This document is intended to be used as a 'tour guide' as CCACP travels this road to financial independence. The document is fluid to allow for changes--large and small. While the Timeline covers three years, the items on the timeline will shift and change depending on opportunity as will the individual efforts within the plan.

While development efforts can be planned and executed in a precise manner, development is a still a beautiful art-form and should be enjoyed as its results will be enjoyed for years to come.

Welcome to the journey and savor the ride!

Christie McDonald
June, 2010

TABLE OF CONTENTS

SECTION I:
CENTER FOR COMMUNITY ARTS AND CULTURAL POLICY OVERVIEW

1.   Mission Statement

The University of Oregon Center for Community Arts and Cultural Policy (CCACP) sustains and strengthens arts, culture, and heritage in the American West through research, policy, education, and community engagement.

2.   Introduction to the Center for Community Arts and Cultural Policy

In its main objective to foster civic engagement and cultural resource development in the American West, CCACP, through research and education, supports policymakers and cultural sector professionals to:

- Cultivate public participation in the arts
- Foster creative activities
- Preserve cultural heritage
- Develop sustainable community cultural development

Center faculty, students, and affiliate members conduct and disseminate policy-relevant research, and create and provide professional development opportunities to address the needs of current and future leaders in a broadly defined cultural sector. The CCACP is most closely aligned with faculty and students in the Arts and Administration Program and the Historic Preservation Program in the School of Architecture and Allied Arts.

3.   Center Priorities

A. Cultural Heritage and Interpretation: The Cascadia Cultural Heritage Program (CCHP) serves the cultural and creative diversity of the great Pacific Northwest through documentation, public presentations, and educational initiatives focusing on cultures and communities. Ultimately, CCHP seeks to incorporate heritage into discussions of economic and ecological sustainability in order to explore the cultural landscape of the Pacific Northwest.

B. Cultural Policy: The academic field of cultural policy is concerned with analyzing the formation, implementation, and evaluation of public policies that influence the health, strength, and vibrancy of the arts and culture sector. Sustained applied research and education in cultural policy will help to cultivate future leaders in the cultural sector who have the commitment and capacity to advocate for the public value and public purposes of the arts in our society. This is an academic field where theory is inextricably linked with practice, and where research, teaching, and community engagement are intertwined.

C. Community Arts: Dr. Lori Hager, Associate Director for Community Arts, is working within two broadly defined areas that address leadership in the Arts. The ePortfolio project addresses the convergence of media communication and the development of 21st century skills in the arts management field. The Artist as Entrepreneur project has three components: Community Youth Arts, Teaching the Arts, and Civic Engagement. All three areas are built on the rapid change in cultural economies and the ways schooling will happen in the 21st century.

The Community Arts priority also includes ChinaVine, an interdisciplinary project aimed at educating English-speaking children, youth, and adults about the cultural heritage of China.

D. Historic Preservation: The University of Oregon's Historic Preservation Program has an interdisciplinary focus within the School of Architecture and Allied Arts. The program offers a Master of Science in Historic Preservation as well as an Undergraduate Minor. Students enter the Master's program with a range of backgrounds, including architecture and interior design, art history, anthropology, history and planning. There are three concentration areas: Preservation Theory, Design, and Technology; Preservation Planning and Cultural Resource Management; and Resource Identification and Evaluation. The program is perhaps best described as having broad cultural concerns with a technical emphasis. Attention is given to historic places, buildings, and landscapes in terms of their specific forms, materials, and construction; the cultural and theoretical context in which they were developed; the impact of time upon their materials, meanings and functions; and the technologies, interpretations and means for sustaining the presence of historic places in the future.

4.   Center Activities in Support of Priorities

A. Faculty Research: At the heart of CCACP's work is the research performed by associated faculty members. The center works to coordinate the process of applying for funding in support of faculty research projects including awareness of funding sources, assistance with university clearances, and other work as needed.

B. CultureWork: CultureWork is an electronic publication of CCACP. Its mission is to provide timely workplace-oriented information on culture, the arts, education, policy, and community. Through advisories, critiques, and case studies, CultureWork has covered current areas of concern to the field. Topics have considered cultural and gendered representation in the museum field, Web 2.0 and new media applications for arts and culture, and the present challenges within the arts community for administrators in mid-career.

C. Student Research: In the final phase of the master's degree program of study in arts management, students are required to demonstrate their ability to select and frame a research topic, propose and implement a plan of inquiry, report the results in written form and conduct a public presentation.

D. Visiting Scholars: Associated with the Arts Administration Program, CCACP brings visiting scholars to share their research and professional experience with students and faculty members at the University of Oregon.

E. Annual Bulletin: Designed as an annual report, the bulletin highlights activities, summarizes funding, and provides an annual CCACP update.

F. Internships: Candidates for the master's degree in Arts and Administration at the University of Oregon are required to complete a 200-hour internship during the summer between the first and second years of the program. Summer internship placements benefit both interns and organizations. With faculty guidance, students secure professional opportunities in non-profit arts and culture organizations, public agencies, and for-profit enterprises--locally, regionally, nationally, or internationally.

5.   Current Operating Budget

Income: For 2009-2010, income for CCACP is $85,000 to $100,000. This number includes:

- Carry over from 2009
- $50,000 from the UO Office of Research and faculty Development
- A minimum of $35,000 in cash and in-kind from the Arts and Administration
    Program

Expenses: For 2009-2010, expenses for CCACP operations funding totaling $71,000 include:

- Director, $12,000
- GTFs, $29,583 (tuition remission)
- Development consultant, $10,000
- Communication consultant, $10,000
- Computer hardware and software, $2,000
- Printed materials (from branding), $2,500

6.   Current Support for Faculty Research

Funding for faculty research has come from a variety of sources including:

EXTERNAL:

Canadian Consulate General in Seattle

National Endowment for the Arts

Oregon Arts Commission

Fulbright Commission

Sony Corporation

Western States Arts Federation

INTERNAL:

UO Office of Research and Faculty Development

UO Vice Provost for Academic Affairs

UO Arts and Administration Program

UO Office of International Studies (East Asian Global Scholars Program)

UO School of Architecture and Allied Arts

UO Canadian Studies Committee

SECTION II:
AUDIENCES

1. Understanding the Appeal of the Center for Community Arts and Cultural Policy

In order to know what might be most interesting to a potential donor, interviews were conducted with faculty and staff, alumni of the Arts and Administration Program, and current AAA donors. What follows is their thoughts and impressions.

A. Faculty and Staff:

Interviews were conducted with the following: Doug Blandy, Patricia Dewey, John Fenn, Kingston Heath, Phaedra Livingston, and Tina Rinaldi.

1. Describe CCACP to an outsider

- Link of research to practice
- Practical application
- Arts education for youth and children
- Digital arts applications are cutting edge and timely
- Research informs practice
- Outcomes based on sound research
- One of the strongest programs of its type in US
- Works closely with local arts institutions
- Provides solid, tested information to policy makers
- Training future leaders of arts organizations
- Program is diverse
- Enriches products and process through academic and social diversity
- Has a national scope with a large presence
- Brings strength to nation and international conferences
- Anchors our history in order to look forward
- Defines our populations; studies changing demography

2. What activities or attribute of CCACP might interest a potential donor

- Opportunity to be involved in exploring and expanding our cultural heritage
- Research is place-based not just regional
- Research excellence
- The importance of arts in the healthy fabric of a community
- Core values can flourish
- Positive economic impact of arts in a community
- Children learn in many different ways
- Arts education leads to creativity in other professions: fires the mind
- Enhances quality of life
- Legacy of leadership in the arts
- Community arts decisions can be based on solid research
- CCACP is directly linked to the classroom: classroom influence research and outcomes are used in the classroom
- Research has community applications

B. Alumni

Interviews were conducted with the following: Yann Doignon, Wendy Miller, and Betsy Bost-wick.

1. Describe CCACP to an outsider

The alumni (mostly Arts and Administration grads) interviewed were unable to describe CCACP as most had not been exposed to the center while students. Once the center was described to them, they each saw applications for the work of CCACP in the career paths they are following. They all have great respect for the Arts and Administration Program and felt that a program that reflected the quality of A & AD would be an outstanding program by association.

2. What activities or attribute of CCACP might interest a potential donor

- Research outcomes would be of value in establishing cultural policy
- Case Studies would be of value
- Proven research supports the efforts of at least one alum

2.   Who is the Fundraising Audience?

Traditionally, the typical major donor would be an older, established individual who's interest has been cultivated over time and who has a significant capacity to make a gift. Reaching that point with a prospective major donor requires a well developed donor pool and cultivation at many levels.

Maintaining a viable donor pool also means replacing donors that are lost through changing interests and attrition. The art of developing donors to the major donor level requires the implementation of focused strategic cultivation over time. Therefore, CCACP's audience should be viewed on several levels.

It is also important to note that graduates of the Arts and Administration program, as well as other center-associated programs, typically seek careers in the non-profit field and that most of these jobs are not high paying. Absolutely, these graduates need to be cultivated but they most likely will not be good major donor candidates. Therefore, the pool of major donor prospects should be built from a much broader base. The good news is that the work of CCACP and its associated programs has the potential for reaching a very broad audience.

A. Level I: New Graduates, entry level donors

In a study of major gift alumni donors conducted in the 1990s, an examination of first-time six-figure donors showed that each one had made their first gift to their alma mater within one year of graduation. This study pointed out the immense value of an effective alumni program and of successfully connecting with alumni immediately after graduation (undergrad and graduate levels), as well as the importance of maintaining those relationships over time.

- Demographics; new graduates (undergraduate and graduate school) just entering their career area and approximately 22 to 30 years old
- University of Oregon alumni
- AAA Alumni
- Arts and Administration, Historic Preservation graduates
- Best approach is through an annual campaign and gifts are expected to be smaller ($10 to $1,000). Large mailing lists (a minimum of 1,000 names) must be generated to be effective.

B. Level II: Community

Given the nature of the research and class work done in and through CCACP, the broader community benefits directly and in a very timely manner through educated and well prepared local policy makers and cultural sector professionals. Additionally, other community organizations such as cultural services and for-profit businesses benefit from a well prepared work force.

- Demographics; individuals approximately 30 to 50 years old with an interest or involvement in the arts, established arts organizations, and corporations
- Staff and board members of community arts organizations
- Policy makers and public agency staff members who administer, monitor, or supervise arts programs
- For-profit and not-for-profit galleries, theaters, and performance groups
- Art collectors and arts patrons
- Best approach is a combination of annual campaign, events, and a good communications plan. Gifts will be small to mid-size ($10 to $5,000). Mailing lists consisting of those mentioned above must be developed.

C. Level III: Potential major gift prospects

While cultivation is needed to develop major donor prospects specifically for CCACP, there are most likely individuals and private foundations who are closer to giving a gift either through an awareness of the center, an already developed interest in one or more of the programs associated with CCACP, through their mission, or through the work of other UO development officers.

- Demographics; individuals approximately 50+years old with a capacity to give and an interest in one or more of the programs associated with CCACP as well as established corporations (corporate giving programs) and private foundations
- Art collectors and arts patrons
- Board members of community arts programs
- Corporations that have exhibited an interest in the arts through organized financial support, art collecting, or have officers on arts organization boards
- Private foundations with an interest or focus on arts, arts education, art administration, community arts, arts research, cultural programs, performing arts, and architecture
- Best approach is a combination of events, great communications, and personal contact. Gifts will be mid-size to large (starting at $5,000).

3. Cultivation and Donor Development

Cultivation is the art and science of developing a potential donor's interest in the program you represent. Because there is a wide range of activities involved in cultivation, it is essential to strategize and develop a course for each individual major donor prospect--including businesses and granting agencies--and for each group of Level I or Level II potential donors.

Cultivation is ongoing and long-term.

Cultivation activities include:

- Mailings--such as annual mailings, general letters, announcements, invitations
- Electronic contact--through websites, social media, and/or email

- Personal contact (made or received)--phone calls, visits, personal notes or letters, thank you notes, regular invitations to activities or events, incidental contact in association with another activity (such as a football game)
- Events--usually designed around a program or topic from the associated programs, they can be small and intimate or a large group activity
- Communications--newsletters, annual reports, websites, brochures, the production of other printed materials such as studies, and broad group invitations (such as for speakers)
- Relationship building--selecting the appropriate staff member to begin building or to sustain an existing relationship. This person will become intuitive about what interests the prospective donor and maintains the primary communications channel. The assigned staff person also become key when strategizing about this particular donor.

SECTION III:
FUNDRAISING

1. Preparing for fundraising

A. Internal Structure

1. Coordinating development activities with the university: Because the Center for Community Arts and Cultural Policy is located in the School of Architecture and Allied Arts (AAA), the primary university development contact is the office of the AAA Constituency Development Officer (CDO). This office can provide the following services:

- Coordination of annual appeals with the appropriate department of the UO Foundation
- Prospective donor clearance (required before cultivation begins)
- University calendar coordination
- Strategic donor planning
- Coordination of information with the UO Foundation
- Advice and expertise

It is highly recommended that CCACP appoint one person (preferably a faculty member or staff person rather than a short-term position such as a GTF or intern) to be the primary contact with the AAA CDO. This will allow for a relationship to be built between the center and the CDO and will help create a continuity of message. Another option is covered in point D below.

2. Coordinating development activities with AAA: Because CCACP does not graduate students and therefore does not have its own alumni donor base, the coordination of efforts with other departments (with an alumni base) within AAA is crucial. On-going assistance from other departments--such as sharing mailing lists--will be very important in building a donor base.

I suggest that CCACP maintain a transparent relationship with other AAA departments by systematically sharing development information--perhaps at AAA-wide staff meetings-- and that CCACP consider the benefit to other departments with each development effort. For instance, if CCACP were to stage an event, consider how it can mutually benefit fine art or architecture. This cross-department coordination should be done by the CCACP Director.

B. Information/Data Management

The University of Oregon Foundation is in the process of updating their massive data management system-something that should be completed later in 2010. At present, the system they have cannot interface with stand-alone data management systems in other departments. While it is unknown as to whether they will be able to do so once the new system is up and running, it is safe to think that they will not allow other department systems any access and that, for accuracy's sake, they will input all shared information rather than merge information. They do feel that the new system will be so robust that it will be able to handle specific needs of colleges, departments, and centers such as CCACP. This opens the door for CCACP to discuss the possibility of maintaining their data on the Foundation's data base or of investing in a stand-alone data management system that best fits its needs.

Regardless of the choice made, any new donor/prospect information received by CCACP such as an updated address, email address, or phone number should be sent to the office of the AAA CDO. This office will, in turn, send information to the appropriate UO Foundation office. It is recommended that this method of sharing information be the standard procedure.

If CCACP chooses to invest in its own data management system, it is highly recommended that the center purchase specific donor management software and not use a data program such as Excel. There are many effective programs available at a variety of costs and under-standing the differences can be very complex.

TechSoup is an online company that compares--and sells--donor management software systems. They are an excellent source for information and the products they sell are less expens-es as a rule. Their spread sheet comparing products is attached as Addendum I (in the Master Copy only). Based on this information, I recommend that CCACP consider the following donor management programs (in the order given):

> DonorPerfect, cost $295 for set up and $54 per month
> eTapestry, cost $35 per month when over 500 records
> GiftWorks, cost $399 for first license, additional licenses are $199 each
> DonorPro, cost starts at $1,000
> eBase, cost is free with some monthly costs to support community of users
> Telosa Exceed, cost $499 for single user
> PledgeMaker Online, cost starts at $300 per month
> Salesforce, cost for up to 10 licenses is usually donated

While cost is a factor, ease of use and software maintenance is more important. A web-based program is preferable as it allows for on-going maintenance and updates to be done at no cost and the stored information is safe from hacking and protected should a computer crash or be stolen.

Often the person entering data must make decisions around style of entering (abbreviations or not, name order [male/female], nicknames or full names, titles, etc). Multiple users with the ability to change information can create problems with the quality of stored data. I recommend that while several people may have read-privileges, only one person have the ability to enter or change information and that that person be a staff member and not a GTF or intern (simply because of frequent turnover). This will allow for continuity of the method of entering informa-tion and ensure accuracy.

For the data base to be useful for development activities, all information gained about donors from their contact information to personal information needs to be maintained in the data base (with good sense and discretion used in determining what in entered and how it is entered) however this information is often sensitive. Great care should be taken in determining who has access to the information in the data base as well as what information could or should be shared. For instance, allowing demographic-access only (address, phone number, etc) which would protect sensitive notes.

Suggestions for data entry are attached as Addendum II.

C. Centralized Data Library
While each granting source is unique, they all request--in some format--the same basic infor-

mation such as demographics, CCACP budget, audited budget, and governing body. Additionally, they often ask for mission statement and description of organization. For ease of completion, these pieces of basic information should be completed and maintained in a central source (intranet or file server) so that those writing grants can "cut and paste" information. The information in the data library should be reviewed annually for updates, corrections, and expansion.

Because granting agencies want to see the full corporate structure of a group or program making application to them, I recommend that CCACP and its affiliated faculty and staff use AAA as their 'structure' therefore using the AAA budget rather than the university for the audited budget and using the AAA Board of Visitors as the governing body rather than the university's trustees. When, and if, CCACP develops an advisory board, use this list in tandem with the Board of Visitors.

The first draft of this information is attached as Addendum III.

D. Staffing Recommendation

I highly recommend that CCACP hire a center coordinator at half- to full-time. The duties for this person would include:

- Coordinating development activities with the CCACP director and the office of the AAA CDO.
- Coordinating information, communications, and the implementation of the CCACP branding recommendations.
- Assisting with activities of CCACP (such as symposiums and lectures).
- Assisting faculty with grant proposals (editing, coordinating time lines, seeking clearances from the UO Foundation or the UO Research office).
- Monitor and maintain the CCACP website as well as any other electronic or social networking media undertaken by the center (Facebook, Linked, blogs, and/or Twitter).
- Maintain the donor data base and coordinate information updates with the office of the AAA CDO.
- Maintain and update centralized data library (for use in communications and grant writing).
- Other duties as assigned by the CCACP Director.

E. University Relationship Building

In order to maintain the level of transparency on which this plan is built, the director of CCACP should take time to meet regularly with staff in various offices and departments across the campus. Be sure that the office of the AAA CDO is informed of pending meetings. Those contacts should include (but are not limited to):

- Office of Research: Interim VP of Research
- Office of Corporate and Foundation Relations: Betsy Richanbach, Director of Corporate Relations and Lynn Stearney, Director of Foundation Relations
- The Vice President for Advancement: Mike Andreason
- Annual Fund Director: Carlyn Shrek

2.   Components of the Fundraising Plan

The heart of this strategic fundraising plan, the activities of the faculty and staff of CCACP, should include the following activities.

A. Communications and Publications

The publications created by CCACP and the communications and branding plan outlined by Bell+Funk form a base on which to begin building a donor and prospective donor pool. The branded materials will help to build an identity and great care should be taken in holding all CCACP materials to the identified brand markers not just now but for many years to come.

Brochures, newsletter, publication, and all methods of communication are the tools of donor identification and development. All communications should provide the receiver with an opportunity to identify themselves to CCACP as a potential end-user of information and as a potential donor. "Click here to give," "Return this for more information," and similar messages need to be a part of all methods of communications. All hard copied information (newsletters, mailings) should have an envelope or some other 'return vehicle' in order to encourage continued contact and/or a donation.

B. Messages That Will Sell CCACP to the Target Markets

1. General messages

- Research has shown that children, adolescents, and young adults exposed to quality arts education become more creative, flexible-thinking, entrepreneurial adults in whatever career they pursue.
- Arts programs (performances, openings, exhibitions) financially benefit their communities through increased tourism, increased restaurant visits, hotel nights, and other increased spending all of which contribute to jobs and the health of the community.
- Community commitment to the arts helps create the kind of community that high-quality employees want to live in and raise their families thereby keeping good employees in the community and attracting new people.
- An understanding of a community's past through its architecture, culture, and stories gives a community depth.

2. CCACP messages

- Within this group of programs, the sense of community responsibility is unique and important.
- The link of research to practice is primary. Unlike other research efforts, CCACP is directly linked to academic programs with research outcomes used in the classroom and the classroom influencing research.
- CCACP has a deep commitment to-and passion for-the community role in contributing to the healthy fabric of the community through understanding, developing, and fostering the arts. It is this environment in which core values can flourish.
- CCACP builds on a tradition of research excellence.

- CCACP faculty are recognized and respected by their peers throughout the US and abroad.

- CCACP faculty research is accessible and immediately applicable for use in communities anywhere.

C. Donor Development

1. Fundraising pyramid: Looking at the traditional fundraising pyramid (attached as Addendum IV) we see that it is divided into three horizontal sections. Conceptually you will see that from a broad pool of general donors and those with an awareness or interest in the organization, a person can be elevated through cultivation into a mid-level donor, then eventually a small group of major donors can be produced through continued cultivation and strategic planning.

The bottom--broadest--portion represents the entry-level donors. While these are our Level I group outlined earlier in Section II, it is where almost all donors begin. This section of the pyramid is where we focus annual fundraising and broad-reaching communications efforts such as electronic communications, newsletters, and website designs.

The center of the pyramid represents mid-level donors (Level II outlined in Section II) but is often where both mid-level and major donors can be located and identified. This group should receive invitations to events, personalized communication, and specialized communications such as an annual report.

The top of the pyramid is the goal for a small, select group of mid-level donors. This is the major gift area with gifts in the range of $25,000 and up. Those who reach this area should receive all the communications planned for mid-level prospects and a strategic plan for more focused cultivation should be in place. Additionally this is the area where a person in stewardship would be located.

2. Major donor development--The Donor Development Circle: All prospective donors--large or small--should be cultivated with an eye toward their giving patterns and potential. The development of a major donor is reflected in the Donor Development Circle (attached as Addendum V) where you will see the major donor development stages. It is important to note that this circle should be clear and understood by center staff in order to help them identify and move forward prospective major donors.

The major donor circle stages include:

- Identification: Donors are identified in a number of ways. 1) Self-identification when they attend an event, respond to a request, or contact the center. 2) Other-identification when a staff member, board member, or current donor brings them to an event or suggests that they be contacted. 3) and through research where prospective donors are identified by their interest in similar programs.

  CCACP can identify potential donors through annual mailings, electronic contact (social marketing, from the web site), communications (newsletters, research reports), event invitations and attendance, and as identified by the office of the AAA CDO.

- Cultivation: Once identified, prospective and new donors are moved into cultivation where a strategic series of contacts increases their knowledge and interest in the center. The early stage of cultivation of potential major donor prospects at UO includes requesting a profile from a donor researcher in the UO Foundation. That request is to be coordinated through the office of the AAA

CDO. A donor researcher will be able to locate any public information regarding the individual including his or her participation with similar organizations and their inclination to be philanthropic. The profile can help direct the cultivation effort by indicating both what interests and does not interest a prospective donor.

CCACP can cultivate all prospective donors through mailings, electronic contact, communications, and event invitations and attendance. Major donor prospects should be assigned a staff person to build the relationship and add personal contact to the process.

A mistake often made at this point is to think that enough is being done with the above steps and major donor prospects are "left on the table" by not moving forward. It is essential that once a major donor prospect is identified, a strategic plan for that donor be developed and regularly reviewed. The office of the AAA CDO can assist with developing the strategy and forming a plan for the prospect. Moving prospective major donors forward is a constant process and must be attended to regularly.

- The Major Gift Ask: The Ask is the moment when a major donor prospect, who has been cultivated successfully, is invited to participate in a project with a financial gift. Simple as this might sound, it is a very complex process that should be planned and produced with great care.

  The process of relationship building is designed to educate the prospective donor and to lead the assigned staff member to understand the prospect's interest--or lack of interest--in projects undertaken by the center. It is through this understanding that a decision can be reached to ask the prospect to become more deeply involved through a financial gift.

  Typically an Ask team includes three people: one person could be a volunteer such as a board member but should know the prospect, one person should represent the organization at the highest level (the center director, the dean, or even the university president depending on the size of the gift being requested), the last person should be able to speak in depth about the project. This basic composition can certainly change depending on the relationship and the project. The AAA CDO can help the center think through the best combination for the Ask team and can help develop the materials (such as a prospectus, project information, as well as supporting UO materials) that should be taken to the meeting.

  Often the prospective donor will need time to think about the request and to talk to the appropriate advisors (family members, financial advisor, attorney) and may not be ready to make a decision at this meeting. Before the meeting ends, determine a date at which someone from the Ask team will contact the prospect to either provide additional information or receive the prospective donor's response.

  The number of times that CCACP might develop a prospect to the Ask level is probably quite limited so CCACP leadership should lean on the office of the AAA CDO for help and guidance through this process.

Unless the prospective donor indicates otherwise, if the answer is 'no' then the prospect is moved back into the cultivation process where CCACP continue to cultivate their interest.

- Stewardship: Stewardship begins when a donor makes a gift and reflects the activities of the cultivation process with one distinction. The cultivation activities should now focus on the program or project sponsored. This is a time where you cannot thank the donor soon enough or often enough. Be sure that he or she is included in any communications regarding the supported project and are invited to events related to the project. For instance, if a donor underwrites a lecture, be sure that the donor is invited to the lecture and perhaps has special access to the lecturer (a private reception or meal).

- Then back to the beginning: Ultimately, stewardship is designed to continue the cultivation process with an eye toward another gift from the donor in the future. If the donor indicates that this is the one and only or last gift they will make, maintain them in stewardship. If they have not indicated that this was their terminal gift, then continue to cultivate and repeat the circle.

D. Structured Activities

1. Mailings: Mailings should be planned on a regular, repeatable annual schedule. The types of mailings that CCACP should undertake include the following:

- Annual Appeal: CCACP should ask to be included once in the UO annual appeal schedule in 2010-11 and 2011-12 then twice, if possible, thereafter. The annual appeal is a way in which to get general information in front of the greatest number of potential supporters and donors. The elements of an annual appeal include a well written letter and return vehicle (gift form and return envelope) and can include other material if deemed an asset to the mailing. The staff at the UO annual appeal office are excellent at designing and assembling a mail piece once the letter is written by CCACP and they can help think through the best approach for the letter.

  In addition to the letter, the most important element for a successful annual appeal is the list of alumni and friends of the university and of CCACP to whom the letter is to be sent. Because CCACP does not graduate students, the center will be dependent on the good graces of other AAA departments to 'borrow' their lists with the understanding that the lists will be used only once (although CCACP may ask again on other occasions) but anyone who responds can go into CCACP's data base for future contact. Additional names, unique to CCACP and associated departments, can and should be added to the mailing list.

  Once on the schedule, CCACP should begin their planning for this letter at least two months prior to the 'drop date.'

  CCACP will need to work with the office of the AAA CDO to get on the university's annual appeal schedule.

- Annual Report or Bulletin: An annual report is a way for CCACP and its associated faculty to 'strut their stuff!' A report should be written and produced annually and

mailed to everyone mentioned in the report, any names in the CCACP database, associated colleagues at the university as well as nationally and internationally, regional agencies, conference attendees, and people of influence related to CCACP's affiliated faculty and departments. It is important that this report be designed using the new branding guidelines.

The mailing list created for the annual report should be reviewed by the office of the AAA CDO prior to mailing. This list should also be included in the annual appeal after it vetted to ensure non-duplication with the efforts of other UO departments.

Additional copies of the annual report should be available for use throughout the year and a back stock should be reserved for inclusion with grant requests (up to three previous years with some request).

- Newsletters: CCACP should produce a newsletter 2 to 4 times annually (perhaps one per term). This communications tool should go to the same list as the annual report. This product could be a single page news sheet with links to more information and should be both electronic and printed. CCACP's newsletter should briefly summarize just completed projects (lectures, classes, presentations, study outcomes) and offer information about upcoming projects and programs particularly if those receiving this information can attend (lectures, programs).

2. Electronic Contact: Electronic networking methods changes so rapidly that I hesitate to suggest possible methods of contact, however, it is vital that CCACP adopt a philosophy around the use of electronic media as a center contact method. For instance, if a blog was employed to share information, perhaps someone should be assigned to vet material before it is launched on the site. The center's philosophy might be that 'we do nothing, just let it happen' however the conversation should take place before these contact methods are used.

The web site should be redesigned using the branding guidelines then maintained by a regular employee or staff member so that the information is timely, links are checked regularly, and that the ease of use by visitors is protected.

3. Events: Events are an excellent cultivation tool and should be a regular part of CCACP's fundraising planning. With that said, they are very time consuming to plan and stage and can be quite costly with little financial return. With both ideas in mind, two successful models to consider are to partner with another department and share planning and costs, and to 'piggy back' by looking at existing academic events and adding a CCACP donor cultivation aspect.

Suggestions for events include:

- The AAA Board of Visitors meets at least once a year in Portland. CCACP could plan an event centered on this meeting such as an open house and guided walk through an historic building in Portland. In addition to Board of Visitors members and their guests, targeted prospects and agency representatives could be invited.

- CCACP regularly brings in guest lecturers. Each of these events presents an opportunity to invite one or more potential donors to attend and to be part of a personal, small group, meet-and-greet with the lecturer.

- CCACP has already planned a two-day symposium in the fall of 2010 and Doug Blandy is chairing an invitation-only symposium in Portland in the winter of 2011. These events offer a number of possible cultivation opportunities including meet-and-greets, attending the sessions, sponsorship (and the associated exposure). If not already planned, luncheons, dinners, and receptions are excellent opportunities and should be included.

4. Major gifts: Thinking ahead to the possibility--and need for--major gifts, staff and faculty should get into the habit of personal communications with prospective donors. This is where a center staff person can prove especially valuable by creating a tickler system to help facultly know when to write notes or make phone calls.

The CCACP staff person and the director should set up a series of major gift meetings with the office of the AAA CDO. These might well be once a quarter initially but evolve to a more frequent schedule as time goes on. Initially these meeting will focus on upcoming events or cultivation opportunities and eventually become strategy sessions for donors assigned to CCACP (through the AAA CDO) and managed by a staff or faculty person. If that manager is someone other than the CCACP director or staff person, then he or she should also attend.

E. Campaigns

Campaigns are generally planned on the university-level for 'bricks and mortar' projects such as a new building, major changes to an existing building, or the purchase of major equipment. If CCACP feels it has the need for a campaign (although highly unlikely) expect the process to include at least a year of planning in direct partnership with the office of the AAA CDO and with the approval of the UO development department.

A campaign can take two to four years to complete once begun depending on the funds to be raised and the state of the national economy.

F. Suggested Granting Sources

Included as Addendum VI (in the Master Copy only) is a list of private foundations that have the potential to fund some areas of interest to CCACP and affiliated faculty. This list, representing a portion of possible private funding sources, includes those foundations which make annual gifts totaling $1 million or more. The list is divided into foundations with a national and international focus and those with a regional focus (Alaska, Idaho, Oregon, and Washington). Also included is a profile for each of several foundations that might be of most interest.

Before making application to any of the listed foundations, contact the AAA CDO then the office of Corporate and Foundation Relations for the necessary approvals.

NATIONAL AND INTERNATIONAL FOCUS
CATEGORY: Arts
Alavi Foundation
Maurice Amado Foundation
Fred C. & Katherine B. Anderson Foundation

Anschutz Found
Bay & Paul Foundation
Stephen and Mary Birch Foundation
Jacob & Hilda Blaustein Foundation
Lynde & Harry Bradley Foundation
Capital Group Companies Charitable Foundation
Christensen Fund
Charles A. Dana Foundation
Gladys Krieble Delmas Foundation
Walt & Lilly Disney Foundation
Doris Duke Charitable Foundation
Educational Foundation of America
Sherman Fairchild Foundation
Fledgling Fund
Ford Foundation
Francis Family Foundation
Adolph & Esther Gottlieb
Graham Foundation For Advanced Studies/Fine Arts
Eugene & Emily Grant Foundation
John Simon Guggenheim Memorial Foundation
William Randolph Hearst Foundation
Hearst Foundation
Heinz Family Foundation
IBM International Foundation
Isabel Foundation
Christian A. Johnson Endeavor Foundation
Sheila C. Johnson Foundation
W.M. Keck Foundation
Kresge Foundation
Samuel Kress Foundation
Lannan Foundation
Lilly Endowment
Henry Luce Foundation
Andrew W. Mellon Foundation
Menton Fund
Robert & Joyce Menschel Family Foundation
Mertz Gilmore Foundation
MetLife Foundation
Nash Family Foundation
Newman's Own Foundation
Open Society Institute
David & Lucille Packard Foundation

CATEGORY: Arts Councils
Verizon Foundation

CATEGORY: Arts Education
Jacob & Hilda Blaustein Foundation
Paul Getty Trust
MetLife Foundation

Terra Foundation for American Art

CATEGORY: Arts Administration
May & Stanley Smith Charitable Trust

CATEGORY: Arts: Cultural and Ethnic Awareness
Christensen Fund
J. Paul Getty Trust
May & Stanley Smith Charitable Trust

CATEGORY: Arts: Research
Foundation for Arts Initiatives

CASCADIA REGION FOCUS
CATEGORY: Arts
Paul G. Allen Family Foundation
Atwood Foundation
Blakemore Foundation
Blue Mountain Community Foundation
Braemar Charitable Trust
Ben B. Chaney Foundation
CIRI Foundation
Collins Foundation
Community Foundation for Southwest Washington
Community Foundation or North Central Washington
Crabby Beach Foundation
Ford Family foundation
Gottfried & Mary Fuchs Foundation
Atsuhiko & Ina Goodwin Tateuchi Foundation
Grays Harbor Community Foundation
Joshua Green Foundation
Rosaria P. Haugland Foundation
Richard P. Haugland Foundation
John C. & Karyl Kay Hughes Foundation
Idaho Community Foundation
Intermec Foundation
Jeld-Wen Foundation
Kaleidoscope Foundations
Kinsman Foundation
Kreielsheimer Remainder Foundation
Maybelle Clark Macdonald Fund
Keith & Mary Kay McCaw Family Foundation
D.V. & Ida McEachern Charitable Trust
Meyer Memorial Trust
James F. & Marion L. Miller Foundation
M.J. Murdock Charitable Trust
Norcliffe Foundation
Oregon Community Foundation
PacifiCorp Foundation
PGE Foundation

Rasmuson Foundation
Raynier Institute & Foundation
Harold & Arlene Schnitzer CARE Foundation
Seattle Foundation
Sherwood Trust
Jon & Mary Shirley Foundation
Charles Simonyl Fund for Arts and Sciences
J.R. Simplot Company
Starbucks Foundation
Ann & Bill Swindells Charitable Trust
Greater Tacoma Community Foundation
Herbert A. Templeton Foundation
Rose E. Tucker Charitable Trust
Watcom Community Foundation
Bagley & Virginia Wright Family Fund

CATEGORY: Arts Councils
Fluor Foundation
PacifiCorp Foundation

CATEGORY: Arts Education
Cathay Bank Foundation
Fluor Foundation
Monsanto Fund
Rockwell Collins Charitable Corporation
Greater Tacoma Community Foundation
U.S. Bancorp Foundation

CATEGORY: Arts: Cultural and Ethnic Awareness
CIRI Foundation
Medtronic Foundation
PacifiCorp Foundation
Principal Financial Group Foundation
Qwest Foundation
Starbucks Foundation

CATEGORY: Arts: Folk Art
Yakima Valley Community Foundation

CATEGORY: Arts: Public Education
Laird Norton Family Foundation

G. Earned Income
Given the outstanding coursework and research of faculty associated with CCACP as well as the quality of visiting lecturers, capitalizing on this resource in order to generate earned income seems very logical.

Each of the ideas that follow will be time consuming and potentially expensive to produce. It should be recognized that the center cannot attempt all of these ideas however earned income as a source of support should not be overlooked. Therefore, considering these ideas is impor-

tant in the overall plan. Some of the earned income opportunities include:

1. *Webinars:* Webinars--or web conferencing--could be designed around existing class discussions or visiting lecturers. For a fee, participants attend a single real-time session. Longer webinars could be conducted around a full term course. Typically, webinars are one-way, live presentation, with little to no audience participation.

A webinar coordinator would be necessary to set up a schedule of webinars, market the service to potential attendees, and collect and process fees as well as manage the mechanics of the actual presentation. Initially, assistance in setting up the mechanism would be needed from IT (webinar software is available), and a method for payment on-line (UO Foundation, PayPal) would be needed. Also be aware that should experience with the technology not be available, web conferencing is often sold as a service, hosted on a web server controlled by the vendor. Offerings vary per vendor but most hosted services provide a cost per user per minute model, a monthly flat fee model and a seat model. Some vendors also provide a server side solution which allows the customer to host their own web conferencing service on their own servers.

The initial investment would pay for itself through the fees that are paid by participants.

2. *Conferences:* Conferences, in the form of symposiums, staged for students, colleagues, alumni, and agencies are already a function of CCACP. With some thought and planning, these opportunities can become a sources of earned income. Sponsorship, fees and tuitions, sales of products (books, reports), and continuing education certificates (see below) can all be a source of income for the center from conferences.

3. *Continuing Education:* If continuing education is a requirement for licensure by any of the graduates of CCACP's associated programs, the center could consider hosting continuing education presentations or offer approved credit hours as part of webinars or conferences. Approval would need to be secured from the licensing body. While this will take some time, it is not usually difficult to obtain. And once approved to offer continuing education, the center should be able to apply that approval to all offerings over a year or more.

4. *Lecture DVDs:* The Brain Lab at the university has produced an outstanding DVD on the development of children's brains. This is a well done, professional product that is user friendly and informational. They market the DVD through Amazon. CCACP should learn from the lab and produce one or a number of DVD offerings focused on class work or the outcomes of research projects. The first such product will take a lot of work as well as time but the eventual earnings could be significant.

5. *Sale of books, reports, and other printed materials:* The production of books, pamphlets, reports, and other printed materials that are developed as a result of research or through the classroom could be marketed through the website and sold with a portion of the sale going to the author and a portion to the center. Printed materials could also be marketed to any licensing organizations and presented for sale at conferences.

3. Procedures

In order for this plan to work effectively, certain procedures will need to be followed. The following information is summarized from the preceding material. Recommended procedures include:

A. Working with Other University Offices and Staff

1. UO Development: The primary contact for development-related activities and issues at the University is the office of the Architecture and Allied Arts Constituency Development Officer (AAA CDO). This office can assist with planning, information, coordination, and general guidance. The AAA CDO can secure a slot of annual mailing, request clearance for a prospective donor, seek clearance to approach a foundation, and request donor research. This office must be contacted first for all issues related to development.

2. UO Foundation: The UO Foundation provides a number of important services for development efforts at the university including money management, donor research, annual mailing, data management, and more. Contact the office of the AAA CDO for services needed.

3. Foundations and Corporations: The Foundations and Corporations office in the UO Foundation researches and develops relationships with private foundations and corporations. This office will need to provide clearance prior to approaching a foundation or seeking corporate support but is an outstanding sources for information. Contact the office of the AAA CDO prior to contacting the Office of Foundations and Corporations.

B. CCACP affiliated faculty and staff

It is strongly recommended that a development and communications structure be developed within CCACP. While the structure should be what works best for all people involved, the recommendation is as follows:

1. CCACP Director: In order to ensure consistency of message, the director is the primary contact for other AAA departments as it relates to development. The director is to be notified first before talking to the AAA CDO about development issues. The director should be involved in all major gift discussions. In that the director reports to AAA administration, all fundraising efforts must be communicated to the director in order for AAA to be updated.

2. CCACP staff person: In order that one person always have a good understanding of what is taking place, the staff person should be at the hub of all communications regarding fundraising (copied on communications). The CCACP staff person does not give approvals nor do CCACP staff need to seek clearance from the staff person however this person can be invaluable in the work of affiliated staff. The staff person will build and maintain a data bank and can be a primary resource when writing grants.

4. Sample Timeline and Work Flow

A sample 3-year timeline is attached. For planning purposes, projects were dropped on the timeline at logical--but not confirmed--times. The early purpose of this timeline is to understand the work flow; when a project should begin in order to be completed on time.

It is strongly recommended that a working copy of this timeline be maintained on-line by the CCACP staff person who can coordinate all the elements of each project.

SECTION IV:
THE DEVELOPMENT OF AN ADVISORY COUNCIL

The Center for Community Arts and Cultural Policy should develop an advisory council. As simple as that is to say, it is a complicated process to establish and requires attention to maintain and grow an entity such as this.

Clear goals and duties as well as an understanding of tasks and time commitment should be established and a very clear vision as to the value to CCACP should be in place prior to the recruitment of members. CCACP will also need to decide whether this is a program-based group or a fundraising group (or both) although faculty were primarily interested in a program-based focus.

The advantages that can be gained by an active advisory council include:
- National and international exposure for CCACP (going both ways)
- Creates business connections
- Connects CCACP more closely to advocacy groups and agencies
- Advocate for CCACP on campus
- Keeps CCACP attuned to the pulse of communities
- Sharing ideas and gaining new ideas or perspectives
- Recognize the usefulness of shifting ideas and changes that are emerging
- Assisting with fundraising through information about foundation initiatives
- Significantly raising CCACP's profile
- Participating in CCACP events

A. Suggested Structure
Based on feedback from affiliated faculty members, the following structure is recommended:

1. Purpose of advisory council is program-based: When asked if a CCACP advisory council should be program or development oriented, faculty and staff overwhelmingly said program oriented. The advantages of having a development-savvy groups affiliated with CCACP is obvious however, with careful selection of advisory council members, development efforts can be enhanced through association, awareness, and access to leading authors, researchers, and academics.

2. Council meeting schedule: It was suggested several times that the group could meet quarterly. I strongly recommend that meetings be twice a year for the first two years then move to a maximum of once per quarter not including summer quarter. I would suggest that one of these meetings correspond to a AAA Board of Visitors meeting in order to coordinate some activities of both groups. Additionally, meetings could be coordinated with any large activity of CCACP such as a conference or symposium.

3. Membership of council is varied and diverse: The liveliest discussions in my interviews were in response to the question of who should be on the council. While few actual names were suggested, the broad stroke ideas were excellent and worthy of consideration. Suggestions follow.

4. Number of members and terms: Membership on council should be a minimum of 9 and maximum of 15 individuals. This is a manageable number of individuals.

Members should be asked to serve a multi-year term that can be repeated once. The most easily managed term length tends to be three years. With membership at 9, 12, or 15, the group can be divided by three and you will have a third of the group rotate off the council every year which allows for continuity of information.

5. Consideration should be given to video-conferencing: If you use video or tele-conferencing for your meetings, individuals from anywhere in the world can join you thereby making it much easier to participate. With this method of meeting, you are more likely to secure the involvement of high-quality individuals. Video-conferencing should be supported with an intranet or on-line meeting site on which meeting materials can be posted. Also be aware that the popular Skype video phone is now available for up to 4 or 5 individuals to talk jointly.

B. Suggested names or organizations to be represented
The names and/or organizations that emerged as suggestions for the advisory council include:
- International: people from the US with international interest and people from other countries
- Diversity should be present
- People who can support the center's goals
- Someone from the Cultural Advocacy Coalition
- Someone from the Portland-based Cultural Advocacy Network
- Eloise Damrosh, Regional Arts and Culture Committee
- Jennifer Yochum, Portland Mayor's Arts Policy Advisor
- Business people involved with cultural policy
- Leading scholars in the affiliated disciplines across the country
- Someone from IMLS (Institute of Museum and Library Studies)
- Other UO research centers
- UO museums
- Consultants in the affiliated areas (Shannon Bell, Liz Carter, Rob Thallon)

SECTION V: Addendum

I. **TechSoup spreadsheet of donor software programs**
Included in Master Copy only.

II. **Suggested data entry guidelines**

III. **Suggested drafts for centralized data library**

IV. **Donor circle**

V. **Fundraising pyramid**

VI. **Spreadsheet of private foundations**
Included in Master Copy only.

VII. **3-year timeline**

VII. **Brand Standards**

VIII. **Disk with all materials included in this plan**

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VIII.   Disk with all materials included in this plan

ADDENDUM I
TechSoup Spreadsheet of Donor Software Programs

ADDENDUM II
Suggested Data Entry Guidelines

In order to ensure consistency and accuracy for the information maintained in a donor data base, it is important to agree on a few guidelines for entering information. Below are some ideas about how to enter information. It is important to note that in most cases, there is no right or wrong. It is a matter of choice, however, the choices should be made early and applied consistently.

This list will certainly be expanded through use.

NAME

- *Nick name vs full name:* ie Bob Smith or Robert Smith, Peggy or Margaret. You could choose to enter the formal name for addresses and the nick name for salutations.
- *Man before woman vs woman before man:* ie Bob & Mary Smith or Mary & Bob Smith
  Style guides suggests that a man's first name never be separated from his last name making the 'proper' form Mary & Bob Smith.
- *In all cases, honor the request of the donor.* If someone requests their name be printed in a particular way, use that format in your data base for their file.
- *Women and Widows:* Within some generational and societal groups, a woman presents herself as Mrs. Bob Smith and a widow will especially continue that practice. Since the data base should represent each individual, she should be entered in the system as Mrs. (not Ms.) Mary Smith but if she has indicated her preferred manner of address is to be Mrs. Bob Smith, enter that form in the field that allows you to enter a preferred name for mailing purposes.
- *Different last names:* Many couples today retain their last names when they marry. Be sure to make that distinction and do not list the woman with the man's last name. Also determine which member of the couple is your primary donor or prospect and list that name first.
- *Hyphenated names:* Hyphenated names are often used when a couples chooses to acknowledge the family of origin for both people. Mary Smith marries Bob Jones and they both become Smith-Jones. People who use a last name as a middle name will not hyphenate so Mary will be Mary Smith Jones—no hyphen. Be sure that care is taken to include the hyphen when used.

TITLES

- *Mrs. vs Ms.:* In most cases, the use of Ms. is a safe choice. If you learn of a preference, use that. If using the more formal Mr. & Mrs. Bob Smith, use Mrs. rather than Ms.
- *Dr.:* Most organizations are inconsistent in this area or have made the choice to drop Dr. from a name. Since CCACP is part of an institution that awards doctorates, it is respectful to include this title when known.
- *Advanced degrees:* Be sure to not include the title and the degree together. Proper usage is either/or. ie Dr. Bob Smith or Bob Smith, PhD., Dr. Bob Smith or Bob Smith, MD. If you use the advanced degree notation, do not use any title.
- *Reverend, Honorable, etc:* Other types of earned titles can precede a name. A decision should be made as to whether to include them or not. However, if you are including Dr., you should also include other earned titles.

- *Both have titles:* List the woman first with her full name and title then the man with his full name and title on two separate lines, if space permits.
  > Dr. Mary Smith
  > Dr. Bob Smith
- *Woman has title:* List the woman first with her full name and title then the man with his full man preceded by Mr. Place on two lines space permitting.
  > Dr. Mary Smith
  > Mr. Bob Smith

ADDRESSES

- *Abbreviations vs spelling out:* The US Postal Service prefers that state abbreviations be used therefore it is acceptable to use OR rather than Oregon. Abbreviations in the street address can be used: St. vs Street. Choose whether to abbreviate street addresses or not and be consistent.
- *P.O. Boxes:* If a person uses a P.O. Box, by all means list that as their mailing address. However it is important that a street address be included in the file if it can be secured.

PUNCTUATION

- *And vs &:* Choose one format and use it consistently.
- *Periods:* St. vs St, Ave. vs Ave, P.O. Box vs PO Box. Choose and be consistent. Also, choose between PhD and Ph.D. and be consistent.
- *All caps vs caps and lower case:* 1111 CENTER ST vs 1111 Center St, NE 40TH AVE vs N.E. 40th Ave. Choose and be consistent.

SUGGESTIONS

Given that individuals prefer a more formal style, it is suggested that you choose to enter names and addresses as follows (note the use of & as well as listing the woman first when appropriate):

Mr. & Mrs. Robert Smith	Dr. & Mrs. David Jones
1111 Center Street	N.E. 40th Avenue
Eugene, OR 97401	Portland, OR 97201

When there are different last names or multiple degrees, use the following:

Dr. Mary Smith	Ms. Mary Smith
Dr. Robert Smith	Mr. David Jones
1111 Center Street	N.E. 40th Avenue
Eugene, OR 97401	Portland, OR 97201

If you use the degree notation instead of the title, use the following:

Mrs. Mary Smith	Mary Smith, Ed.D.
Robert Smith, Ph.D.	Robert Smith, Ph.D.

One more consideration; if both people are alums of the university, it is good form to list them on separate lines of an address even if they do not have any special circumstance:

> Ms. Mary Smith
> Mr. Robert Smith

ADDENDUM III
Suggested Drafts for Centralized Data Library

A centralized data library will make the process of writing grants--both public and private--as well as preparing proposals for donors much more efficient. The data library should be maintained on an intranet site and password projected. This material should be reviewed annually for accuracy and updating. Materials that should be maintained in the data library include:

ORGANIZATIONAL INFORMATION
Maintain several paragraphs that can be cut and pasted into grant proposals then edited to fit length requirements and individual styles. Topics for these paragraphs should include:

1. Description of CCACP and its relationship to AAA and the university.

In its main objective to foster civic engagement and cultural resource development in the American West, the University of Oregon's Center for Community Arts and Cultural Policy (CCACP), through research and education, supports policymakers and cultural sector professionals to:

- Cultivate public participation in the arts
- Foster creative activities
- Preserve cultural heritage
- Develop sustainable community cultural development

Center faculty, students, and affiliate members conduct and disseminate policy-relevant research, and create and provide professional development opportunities to address the needs of current and future leaders in a broadly defined cultural sector. The CCACP is most closely aligned with faculty and students in the Arts and Administration Program and the Historic Preservation Program in the School of Architecture and Allied Arts.

2. CCACP mission statement.

Mission Statement: The University of Oregon Center for Community Arts and Cultural Policy (CCACP) sustains and strengthens arts, culture, and heritage in the American West through research, policy, education, and community engagement.

3. Affiliated programs

Cultural Heritage and Interpretation: The Cascadia Cultural Heritage Program (CCHP) serves the cultural and creative diversity of the great Pacific Northwest through documentation, public presentations, and educational initiatives focusing on cultures and communities. Ultimately, CCHP seeks to incorporate heritage into discussions of economic and ecological sustainability in order to explore the cultural landscape of the Pacific Northwest.

Cultural Policy: The academic field of cultural policy is concerned with analyzing the formation, implementation, and evaluation of public policies that influence the health, strength, and vibrancy of the arts and culture sector. Sustained applied research and education in cultural policy will help to cultivate future leaders in the cultural sector who have the commitment and capacity to advocate for the public value and public purposes of the arts in our society. This is an academic field where theory is inextricably linked with practice, and where research, teaching, and community engagement are intertwined.

Community Arts: Dr. Lori Hager, Associate Director for Community Arts, is working within two broadly defined areas that address leadership in the Arts. The ePortfolio project addresses the convergence of media communication and the development of 21st century skills in the arts management field. The Artist as Entrepreneur project has three components: Community Youth Arts, Teaching the Arts, and Civic Engagement. All three areas are built on the rapid change

in cultural economies and the ways schooling will happen in the 21st century. The Community Arts priority also includes ChinaVine, an interdisciplinary project aimed at educating English-speaking children, youth, and adults about the cultural heritage of China.

Historic Preservation: The University of Oregon's Historic Preservation Program has an inter-disciplinary focus within the School of Architecture and Allied Arts. The program offers a Master of Science in Historic Preservation as well as an Undergraduate Minor. Students enter the Master's program with a range of backgrounds, including architecture and interior design, art history, anthropology, history and planning. There are three concentration areas: Preservation Theory, Design, and Technology; Preservation Planning and Cultural Resource Management; and Resource Identification and Evaluation. The program is perhaps best described as having broad cultural concerns with a technical emphasis. Attention is given to historic places, build-ings, and landscapes in terms of their specific forms, materials, and construction; the cultural and theoretical context in which they were developed; the impact of time upon their materials, meanings and functions; and the technologies, interpretations and means for sustaining the presence of historic places in the future.

4. *List of CCACP accomplishments and completed projects*
5. *List of recognitions and awards received by CCACP and/or affiliated faculty and programs.*

DEMOGRAPHICS

Maintain current demographic information for the state, city, university, and AAA. Additionally, if possible, maintain demographic information about the university faculty and faculty affiliated with CCACP.

BUDGET INFORMATION

The budget information usually requested will be:
1. Project Budget--The person writing the grant should have this information.
2. Organization (CCACP) Budget--This should be maintained in a traditional budget format (Income and Expenses) and with as much detail as possible so that the grant writer can place the information in the format requested.
3. Governing organization (AAA)--Secure this information from the AAA Dean's Office annually. This is likely to be a large, multi-page report and might be best maintained as a hard copy by the CCACP staff person.
4. Audited or unaudited annual reports--These should be maintained--most likely in hard copy--by the CCACP staff person. They should be updated annually but do not throw away past years as they are sometimes requested.

FACULTY VITAS

All affiliated faculty as well as any other staff who might have supervisory responsibility for any aspect of research or the application of research should be located here.

PROGRAM SUMMARIES

Each affiliated program should have a one-paragraph summary in the library that explains the program's goals and activities to meet those goals.

ADDENDUM IV.
Donor Circle

Donor Development Circle

Stewardship

Major Gift Ask

Identification

Cultivation
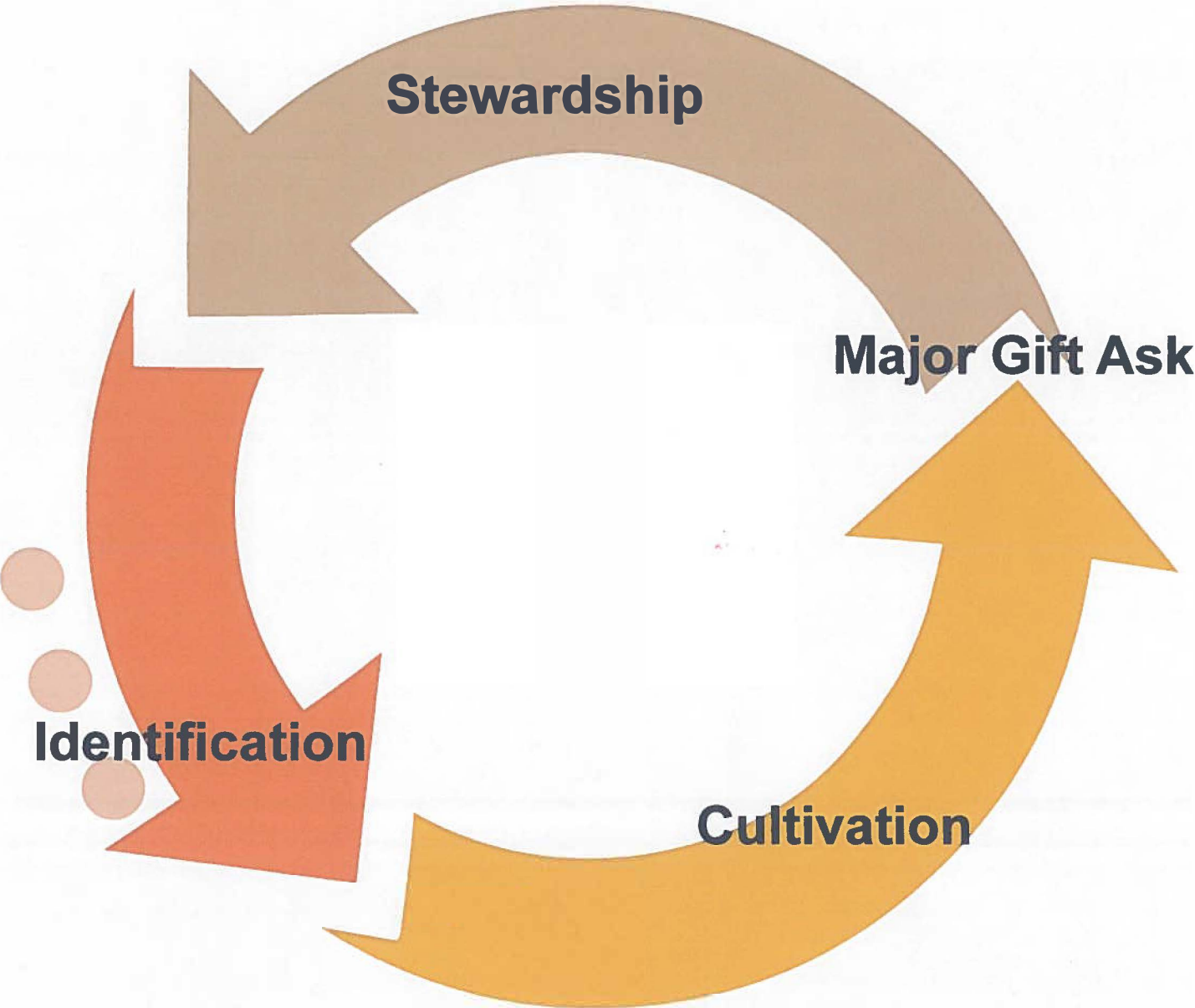
ADDENDUM V.
Fundraising Pyramid

Donor Pyramid

Major Gift Donors

Major gifts generated through cultivation of prospects identified through the activities used for mid-level and entry level donors.

Mid-Level Donors

Mid-range gifts generated through events, grant writing, personal contact, communications, and mail campaigns

Entry Level Donors

Smaller gifts generated through mail campaigns and events.
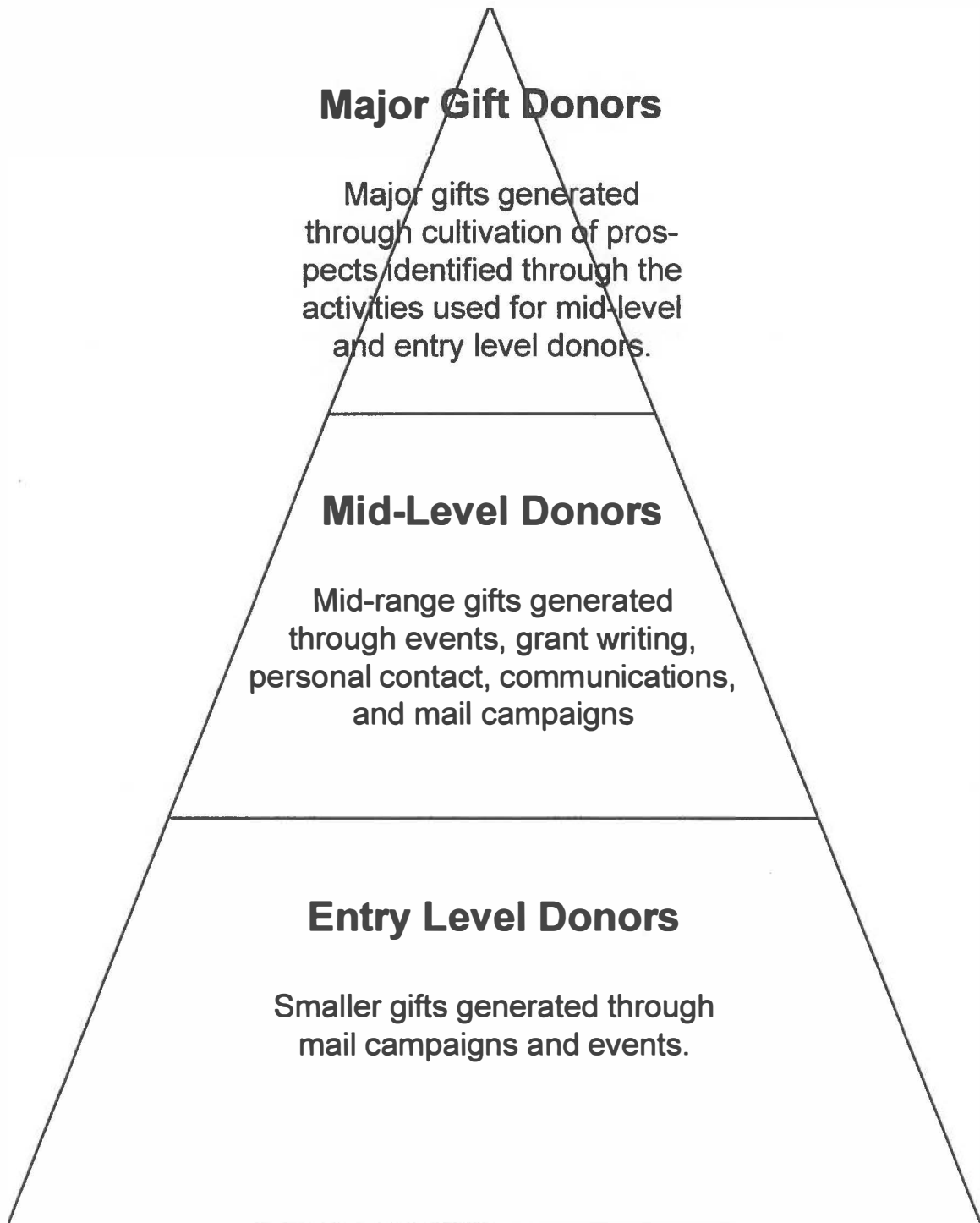
ADDENDUM VI.
Spreadsheet of Private Foundations

Packet 1   Foundations with a national and international focus

Packet 2   Foundations with a Cascadia Focus
              Alaska, Idaho, Oregon, Washington

Samples of foundation information availaable

ADDENDUM VII.
3-Year timeline

SAMPLE WORK FLOW CHART

2010-11	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June	July	Aug
Communications												
CultureWork												
eNewsletter									begin planning			
print newsletter									begin planning			
annual bulletin						Editorial meeting	writing	to designer/ printer	mail			
Events												
BofV meetings								Meeting in Portland/ Patricia				
Portland event												
Advisory Council meetings									begin planning			
Conferences/symposiums										begin planning Devel. elements		
Fundraising												
Annual fund letter										request dates for 2011		
Foundation deadlines--pvt												
Foundation deadlines--gov												
Major Donor meetings										Meeting		
Earned Income												
Webinars										begin planning		
Lecture DVDs										begin planning		
Sales of books etc										begin planning		
Other												
Hire a staff person										begin planning		

2011-12	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June	July	Aug
Communication												
CultureWork												
eNewsletter												
print newsletter												
annual bulletin						Editorial meeting	writing	to designer/ printer	mail			
Events												
BofV meetings								Meeting in Portland/ Patricia				
Portland event					Planning begins for house tour			House tour in PDX/Kingston				
Advisory Council meetings		Tele-confer. Meeting						Meeting in Portland/ Patricia				
Conferences/symposiums		fall confer.			Portland							
Fundraising												
Annual fund letter		Write letter/plan design			Drop Date			Write letter/plan design			Drop Date	
Foundation deadlines--pvt	OAC/PD											
Foundation deadlines--gov		NEA/PD										
Major Donor meetings	Meeting				Meeting				Meeting			
Earned Income												
Webinars	set schedule for year											
Lecture DVDs	Work w/UO											
Sales of books etc	Estab. Sys											
Other												
Hire staff person	Complete											
Review/update data library		complete										
2012-13	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June	July	Aug
Communication												

CultureWork												
eNewsletter												
print newsletter												
annual bulletin						Editorial meeting	writing	to designer/ printer	mail			
Events												
BofV meetings								Meeting in Portland/ Patricia				
Portland event					Planning begins for house tour			House tour in PDX/Kingst on				
Advisory Council meetings		Tele-confer. Meeting						Meeting in Portland/ Patricia				
Conferences/symposiums												
Fundraising												
Annual fund letter		Write letter/plan design			Drop Date			Write letter/plan design			Drop Date	
Foundation deadlines--pvt	OAC/PD											
Foundation deadlines--gov		NEA/PD										
Major Donor meetings	Meeting				Meeting				Meeting			
Earned Income												
Webinars												
Lecture DVDs												
Sale of books												
Other												
Review/update data library												

ADDENDUM VIII.
Brand Standards

The Center for Community Arts and Cultural Policy
Brand Standards
May 18 (Draft)

1. Brand Overview:

The brand of an organization is comprised of its position, personality and promise (the combination of the values and mission of the organization). These three elements make up the Brand Platform.

Position is the differentiating description of an organization. Position is relative to competing or similar organizations. **Personality** represents the human-like characteristics of the organization and is usually expressed in adjectives or personality descriptions. **Promise** is what people can always expect of the organization.

Brands are informed by the internal culture and by the brand audience. For maximum effectiveness the brand is distributed (or expressed) consistently through every touchpoint of the organization. In the case of CCACP, brand distribution happens through communications, programs and processes, and facilities.

These elements can be expressed through visual cues such as symbology, iconography, typography (traditional to modern), color (warm to cool), design style, grids and facilities. Brand platforms can also be expressed through the verbal cues such as wording, communication style (casual to formal) and repetitive key messages. Even programs and personnel represent brand touchpoints.

2. The CCACP Brand Platform:

CCACP Brand Position:
CCACP is an internationally recognized community arts and cultural policy research center rooted in the Cascadia region.

CCACP Brand Personality:
Brand personality affects visual symbology and color more than any other aspect of a brand platform. The CCACP brand personality is complex, but for purposes of brand differentiation it can be reduced to these concepts:
Collaborative
Innovative
Scholarly
Approachable
Engaged

CCACP Brand Promise:
Diversity
Inclusiveness
Excellence in scholarship

3. CCACP Brand Support:

Visual Branding:

The CCACP visual branding should be compatible with the brand standards of the University of Oregon, while at the same time it must have some elements in the visual identity that differentiate it from the University as a whole and from other national organizations that share similar roles.

a. **Color Identity**: The predominant colors associated with the CCACP are Forest Green (PMS 355) and a Light Blue (PMS 801) (Note: the University of Oregon's green is PMS 3425)

b. **Typography**: The University of Oregon's official type styles are Melior Roman and Akzidenz Grotesk Regular. These faces should be used for CCACP to maintain consistency with the University. Hand-written typography is also acceptable for headlines.

c. **Iconography**: The CCACP's mission is focused on humans and their interaction with culture and heritage. Illustrations should be hand-drawn rather than computer-generated and could include scratchboard or watercolor sketch treatments.

d. **Unit Mark**: The University Brand Guidelines allow for use of a Unit Mark (also called a Unit Seal) to designate particular programs. The CCACP has a unit mark depicting a hand. This hand is based on Anasazi straw splatter silhouettes found in cliff dwellings in the American Southwest. It is appropriate because it represents arts, humans and cultural heritage.

e. **Photography**: The University photography guidelines "Our Approach to Photography" outline various ways to approach subject matter. The guidelines are useful for determining how to take photos. To ensure that the photos have a distinct look for CCACP, use the University guidelines, but either treat the photo edges with rough edges to give more of an immediate, hand-done feel (free masks are available online) or make the photos feel as though they are placed in the medium by human hands by placing them slightly askew or with simple drop shadows.

f. **Grid**: For consistency with the University grid and because of the design flexibility, use a 16-panel grid (four columns) on visual material.

Verbal Branding:

Style

Copywriting style is a key component of brand development and is based on the personality and position of the entity. Consistent with the Brand Platform, the CCACP style is approachable and earnest without being too friendly and casual. The style is straightforward and direct.

Key CCACP concepts for verbal communication
- Community
- Collegiality
- Location (PNW) known as a center for innovative culture, arts and arts policy

- Aligned with AAD and HP
- Academic excellence is a universally shared value
- Not just "High Arts"

Constituencies

Good copywriting keeps the audience in mind. Different audiences are interested in different things so it pays to know who the intended recipients of CCACP verbal communications are and what the benefits of the organization are to them. The primary audiences of CCACP are:
- Alumni
- Scholars and colleagues throughout the world
- Government policy makers
- Educators, education policy makers
- Municipalities
- States arts councils
- Local arts agencies
- Theaters
- Museums
- Media
- Internal audiences (e.g.: other departments, VP Research, etc.)
- Donors, funders, potential donors
- Potential students
- Current students

CCACP Benefits to Potential and Current Students:
- Strong research focus
- Policy research
- Conferences, symposia
- Information base for students
- Differentiates UO AAD from other AAD programs
- Seamless relationship of research, community engagement and teaching
- Learning community
- Supportive, encouraging environment
- The local community is our laboratory
- Sustainability focus
- Cascadia focus

CCACP Benefits to Alumni:
- Connections to fellow alumni
- Connections to CCACP faculty
- Connections to community arts policy makers
- News about CCACP events
- Conferences, symposia
- Access to professional research
- Association with a respected program

CCACP Benefits to Donors:
- Focused on community arts policy and cultural heritage
- Connections to others who share interest in CCACP's mission

- Association with a respected program
- Insider access to special events and speakers
- Updated cultural heritage and community arts policy information
- Cascadia focus

CCACP Benefits to Internal Audiences (at UO):
- Model entrepreneurial research center
- Option for multidisciplinary collaboration
- Association with a highly regarded research center
- Source of information on policy and heritage

Policy-making Bodies and Arts Agencies:
- Updated cultural heritage and community arts policy information
- Accessible experts for information
- Specialized areas of expertise
- Outside source of expertise in Cultural Arts Policy and Historic Preservation
- Sustainability focus
- Cascadia focus
- Access to professional research

ADDENDUM IV.
Disk with all materials included in this plan