



NAWCC

Development Task Force

Preliminary Report

December 2, 2011

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Executive Summary

The results of a survey conducted by an NAWCC Task Force Consisting of 5 members of the Board of Directors are presented for full Board review. Approximately 300 member responses were recorded and grouped into 10 related categories. Major recommendations are 1) Develop a comprehensive, systematic, and personalized approach for recognizing and validating all Association donors and members, 2) the need to identify a Chair for the Development Committee, 3) Evaluate the potential use of professional Fundraising Counsel to assist in the design of a Development Campaign, 4) Implementation of an Advisory Team to the Board of Directors, 5) and consideration of a full or part-time Professional Development Staff Position in the future when and if finances permit.

Many important findings and recommendations are provided under the 10 major headings. The findings are wide ranging with several suggestions for fund raising activities. All recommendations are presented with the contingency of sufficient funds being available to implement the suggestions.

A special note of sincere gratitude is extended to the 32 Association members who willingly gave of their personal time to share their ideas about Financial Development, in particular, and the Association, in general. Thank You!

Introduction

At the June NAWCC Board of Directors meeting held in Overland Park, Kansas, a task force was appointed to address the topic of Financial Development for the Association. The members of the Board of Directors who volunteered or were appointed to the Development Task Force were Phil Gregory, David Lee, Tom McIntyre, Joanne Orr, and Jerry Thornberry. From this point forward throughout the remainder of this report the Development Task Force Team will be referred to as the DTF or the Team.

The only directives received by the task force were a verbal charge to report the group's progress at the regularly scheduled meeting scheduled for December 1-4, in Columbia, Pennsylvania. As a result of the group's work, according to the procedures outlined elsewhere in this report, four goals were developed. The four major goals are listed immediately below.

1. Create a plan or framework which will guide comprehensive Financial Development activities for the Association now and in the future.
2. Generate ideas, plans, and activities for consideration by the Development Committee as tools to implement development programs.
3. Identify members who have the interest, skills, and commitment to assume leadership roles for the Association's ongoing Development Program
4. Create awareness among NAWCC members about the importance of Financial Development to the long-term future of the Association.

Procedures

The information contained in this report was gathered from personal conferences with representative members of the Association. Most of the conferences were staged by telephone; however, a few were conducted in person and some telephone conferences were supplemented by later in-person visits or email messages. All multiple conference sessions were recorded as a single session except the DTF member sessions that were recorded as two separate groups of individual conferences. The information gleaned for this report resulted from a minimum of 36 separate conferences from 32 members. Of the eight members who did not respond to a request for a phone visit, six were sent two electronic requests, one was sent a personal letter via USPS and an email message, and one member was sent one email request.

The conferences were very open ended with the respondents providing any ideas about development in particular, or the Association, in general, as they wished. All of the comments made by the participants were recorded in writing at the time of the conference (they were so informed and often paused until the Chair was finished recording a thought or idea). The conferences were listed and numbered sequentially. For each additional conference, the successive numbering of entries was continued. The conference listings along with the appropriate recordings were periodically forwarded to all members of the DTF. The responses tended to group themselves by topic into ten major categories. The responses that were related (personal validation and improved communication, for example) were sequentially numbered under the appropriate category with their original conference listing shown in parentheses for cross checking. The list, under each heading was used to determine the study findings for each

category. All entries, with one exception, were provided by the respondents. The TF Chair expanded the description of one entry, but did not record any personal responses to the various lists.

Findings and Recommendations

I. Professional Fundraising Counsel

The consideration of a professional consultant was introduced to the list during the initial calls to Task Force members. The concept was introduced independently and quite forcefully during an early conference with a non-task force member. Of the 25 members who addressed this topic, preponderance favored the idea of researching the issue. There were a few strong statements such as: "Would you build a building without using an architect?", "If you really want to get well known, you have to have an expert do it. Someone who knows how to raise money and knows what he is doing", "Without the help of a professional, you could wonder around in the wilderness." There also were a couple of statements opposing the use of outside assistance: "An outside consultant is a waste of money," "We tried it way back when and it was a total bust. They went to one regional/Board Meeting, put on a dog and pony show and were fired. If you can get them cheap-they want money up front." Most of the respondents expressed concerns about the cost of using professional assistance.

1. Finding: Of twenty-five recordings focusing on the use of professional counsel to assist with the development process most ranged from strongly favorable to mildly favorable or neutral. Several of the positive respondents expressed some concern about the costs, however. Two respondents were opposed or strongly opposed.

1A. Recommendation: It is recommended that the Board of Directors evaluate the types of services including costs for providing such services, from firms offering professional counsel for financial development. Further, if the services are appropriate, that efforts be made to procure the funds to utilize such services.

II. Financial Participation by Board Members

Each time this item surfaced during the conferences it was initiated by the contributing members. The topic was never fed into the discussion by the facilitator. While the number of separate suggestions was low when compared to other headings, the individuals who initiated the subject strongly stated their position.

2. Finding: Participation by the Board of Directors in the Financial Development Program of the Association was perceived to be minimal by seven members who initiated responses regarding the subject. The expectation is that financial contributions by Board members be significantly increased.

2A. Recommendation: It is recommended that this information be forwarded to the Chair of the Board of Directors for placement on a future agenda as a discussion item

III. Relationships with Surviving Spouses/Collection Management Assistance

Some of the members participating in this project took the time to describe what they feel happens when a members' spouse passes away. The point was made that often, upon the death of the primary member, the connection between the NAWCC and the surviving spouse tends to evaporate and that no proactive plan is in place to maintain a relationship. One person stated "that when a member passes away, the surviving spouse might enjoy a continuing relationship with members of the national office and/or the local chapter." In addition to cultivating a continuing relationship in order to support the spouse, the relationship, which is important in its own right, might result in additional donations being received by the NAWCC. An additional thought expressed was that the spouse, who in some cases is taken advantage of by profit-seeking individuals, could benefit from assistance by the Association in liquidating his/her collection. One member suggested that we might provide a collection liquidation service for a small fee.

Two respondents requested a review of the requirements for membership in the Old Timer's and Fellows Chapter. A change in requirements would result in more members receiving deserved recognition and possibly encourage more individuals to consider donating their collections to National.

3. Finding: When a member dies, no planned program exists to foster a continued relationship between the surviving spouse and the Association.

3A. Recommendation: It is recommended that this item be forwarded to the Chair of the Membership and Development Committees for the purpose of creating and implementing a plan to improve and monitor communication with surviving spouses. The plan may involve, in part, certain actions by the NAWCC staff, as approved by the Executive Director.

3B. Finding: Some chapter programs currently exist whereby the Association offers a support service to the surviving spouse for liquidating his/her collection.

3B. Recommendation: It is recommended that the Chair of the Board of Directors appoint a committee to create procedures, guidelines, and publicity materials for implementing this service.

3C. Finding: Some long-tenured members perceive the qualifications for membership in the Old Timers and Fellows Chapter to be arbitrary, capricious, and unnecessarily restrictive.

3C. Recommendation: It is recommended that this finding be referred to the sponsor of the Old Timer's and Fellows Chapter for the purpose of evaluating the number of members who might qualify under various criteria. An example would be to determine how many members 80 or more years old with 40 years of membership currently do not qualify to be included in the Old Timers and Fellows Chapter. A recommendation regarding the dispensation of this item should be presented, by the Chair and Executive Director, to the Board of Directors no later than the June, 2012 Board of Directors meeting.

3D. Finding: Some members may be more likely to contribute their collections to the Association than money.

3D. Recommendation: This finding will be addressed in recommendations 3A, 3B, and 3C as presented above.

IV. Suggestions for New Fundraising Ideas

Several suggestions for new or alternative methods for raising funds were presented. While some suggestions probably have more merit than others, all are presented under the recommendations section of this grouping.

4A. Finding: A need exists to identify and implement new and alternative fund raising activities to support the Association.

4A. Recommendation: Refer the following fundraising ideas to the assigned groups for further evaluation. A feasibility report and a plan of action, if deemed appropriate, would be presented to the Board within a six- month interval.

- a. Sell non-horology items on the 4\$SaleNAWCC website with the proceeds going to the Association and the donor receiving a receipt for taxes. (Board Chair, Executive Director, and two members appointed by the Executive Director and Board Chair)
- b. Develop a horology exhibit which could be used in a program with art or other museums. (Museum Director and two other members appointed cooperatively by the Executive Director and the Board Chair)
- c. Plan an auction, to be held at a national convention, of items donated by members. (NAWCC Convention Committee)
- d. Stage a non-horology activity such as a Willie Nelson concert.
- e. Sell information to the public on the NAWCC website by permitting selected material to be downloaded for a specific period of time for a fee. (NAWCC staff and one representative from the Development Committee)
- f. Develop a traveling display for leasing to large public venues or exchange with other museums. It could be entitled "American Clock and Watch Manufacturing from 1750 to 1900". It would require a grant and a couple of threads running through the exhibit. One thread would be the role of art in the industry. A second major theme of watch and clock manufacturing as a microcosm of economic development from Colonial America until 1900 would be a

consideration. (Museum Director and two other members appointed cooperatively by the Executive Director and the Board Chair)

g. Design publicity materials that targets donors who might have an interest in providing scholarships for the School of Horology. (NAWCC Department representative, one member of the BOD, and one member of the Development Committee shall address this item.)

h. Use international travel as a source of income.

V. Validation of Members Including Donors/Communication

Even with the provision of a website, bi-monthly publications mailed or forwarded electronically to members, an extensive network of local chapters, numerous regional meetings and a national convention, the need to improve communication by the Association's leadership and governing body surfaced repeatedly. The issue of members not feeling respected was presented on several occasions. The need for more consistent and comprehensive feedback to donors was also identified by participants. The findings and recommendations vary widely throughout this grouping of responses.

5A. Finding: Donors are not kept up-to-date on the progress of projects. The system of reporting project progress is inconsistent.

5A. Recommendation: A system needs to be created that will keep donors informed regarding the status of projects and how a partial gift fits into the completion of the overall effort.(Executive Director, Museum Director, and the Chair of the Development Committee)

5B. Finding: The Gift Catalog is not kept up-to-date.

5B. Recommendation: The Gift Catalogue is to be kept up-to-date with the progress of specific projects noted. The projects need to be listed in order of priority, kept current with projects under consideration, and continuously monitored. (Executive Director, a staff Member appointed by the Executive Director, and a representative of the Development Committee to be appointed by the Chair)

5C. Finding: The Association has not used opportunities to acknowledge contributions through signage or labeling. The naming process for large contributions also remains dormant.

5C. Recommendation: A comprehensive assessment should be undertaken of all artifacts on display, electronic and on-site, to ensure that signage appropriately credits the contributor. Included in the assessment would be the consideration of a master list of the names of donors meeting a certain contribution level in the foyer of the National Office. In addition, any fund raising material, electronic or printed, should introduce the opportunities and conditions for naming a structure, program, or activity in honor of the donor. (Staff as assigned by the Executive Director)

5D. Finding: For whatever reason, justified or not, some members, including some individuals who were previously donors no longer feel respected by Association staff or governance leaders.

5D. Recommendation: With the understanding that the Association belongs to all of us, equally who pay membership dues, and that Association leaders are committed to providing quality service to all members, it is recommended that a small team composed of Board members and professional staff brainstorm strategies for establishing positive contacts with any member who becomes disenfranchised with the organization.

VI. Publicity Statements-Position Related

A call for improved publicity was intensely voiced with conviction by several respondents. Some of the comments were “we need to develop our story,” and “for development you need a publicity person,” “NAWCC has no real marketing plan,” plus several other similar statements. The entries in this section are very closely related to No. 9, which addresses the return to a staff position to lead the development program.

6. Finding: A comprehensive publicity component for a successful development program is lacking.

6A. Recommendation: Adopt a Board of Directors annual goal that challenges all personnel, departments and committees to search for ways to improve their emphasis on marketing and publicity. (Board of Directors)

VII. Publicity Statements-Activities

The need for an improved publicity emphasis permeated many of the threads included in this report. This section could easily be grouped with No. 6 above. However, in attempt to communicate the ideas of respondent members with some detail, two sections of this report have been dedicated to specific publicity suggestions.

7A. Finding: The publicity component for a successful development program is lacking.

7A. Recommendation: Consider member suggestions listed below.

a. Set up an exhibit or display at the large automobile swap meets staged annually at Hershey, and Carlisle, PA. A display of automobile clocks would be appropriate.

b. Establish a reciprocal relationship between our museum and the Hershey factory tourist center.

c. Attach a one page letter about development to the reports that Steve sends to chapter presidents.

- d. Set up a clock/watch display at the Getty Museum.
- e. The NAWCC needs to share more programs with the non-profits in Lancaster County.
- f. The NAWCC, as an organization, needs to be more proactive in establishing a political relationship with the member of the U. S. House of Representatives who represents Lancaster County.
- g. Review the Adopt-A-Clock program with the Development Committee.
- h. Review the Annual Appeal program with the Development Committee.
- i. Search for ways to include influential representation from Columbia or Lancaster County on Association boards or advisory committees.

VIII. Create an Advisory Board/Team

This concept was introduced very early in the study and received much discussion from participants. The opinions of participating members ranged from being strongly in favor to proceeding cautiously with certain conditions to be considered when establishing the team. For participants who favored the association having a development program, no strong opposition was expressed to the advisory team idea. It was assumed that the individual (s) who opposed development as a consideration of association would also oppose the creation of an advisory team.

8A. Finding: A significant majority of study participants favored consideration of a Development Advisory Board/Team.

8A. Recommendation: Refer this item to the Executive Director for further evaluation with the intent to establish guidelines and suggestions for implementation. No other action is to be taken without approval of the Board of Directors.

IX. Development Statements or Suggestions

During the conferences participants offered over 90 development suggestions for consideration by the Development Committee and the Board of Directors. When possible some of the items, such as the Gift Catalog, have been addressed under other headings. Some of the items listed are less practicable to implement when compared to other suggestions.

9A. Finding: Donors are more likely to respond when they know the gift will fund a specific project or need.

9A. Recommendation: All major fundraising efforts should be centered on a specific project or have a clear goal definition. (Board of Directors, Executive Director, and Development Committee)

9B. Finding: The Development Committee has been without a chair and has been inactive.

9B. Recommendation: Appoint a Chair and/ or implement a planned search in an effort to identify an individual to serve as Chair of the committee with the expectation that the group would begin implementing the approved portions of this report. (Board of Directors)

9C. Finding: The seeking of financial support for programs and equipment through a more proactive grant writing effort is expected by representative members who participated in this study. For example, grants should be sought for: 1) an educational video for publishing books, 2) scholarships for the disabled to attend the School of Horology, 3) infuse horology into public schools curricula, 4) workshops, 5) Science Fairs, and 6) build relationships with Vocational-Technical Schools.

9C. Recommendation: This report, with emphasis on expectations as appropriate, is to be reviewed with key employees in each division of the National office. The Development Committee shall include a support statement in its annual goals statement. (Executive Director, Division Heads, and Development Committee)

9D. Finding: While several development activities are implemented annually by the Association staff, no written comprehensive development plan or program exists.

9D. Recommendation: A comprehensive development plan is to be cooperatively created by the Executive Director, or his designees, and the Development Committee with progress to be presented to the Board of Directors at the June, 2012 meeting. Minimally the plan will set annual goals with accompanying activities to accomplish said goals and identify personnel, by position, responsible for facilitating each activity.

X. Consideration of a Development Director on Staff

The return to an administrative model with a professional Development Director whose responsibility would be to lead the development program ranged from “strongly supportive” to “not supportive.” However, a majority favored exploring the concept, possibly with a “phase-in” approach by consideration of a “part-time” position. Concerns were frequently expressed about 1) how to fund the position, and 2) the assignment of extraneous responsibilities not related to development. Several respondents voluntarily offered comments to the effect that the Executive Director has a large scope of responsibilities into which he must fit time consuming development activities. The information in this section is closely related to the content in section six.

10A. Finding: The NAWCC Development program would have greater potential for success if managed by a professional Development Officer.

10A. **Recommendation:** The Board of Directors and Executive Director should continuously monitor the financial standing of the Association and Development Program results in order to determine if a full or part-time position is warranted and justifiable. Such consideration should consider, as one option, such person to serve on a contract or fee for service basis.

Closing Statement

The items listed above were deemed important by representative members of the Association and are presented for consideration and study by the Board of Directors, Executive Director, Association Staff and members. Some of the items are more practicable than others. All will be reviewed by the appropriate Association Committee, Association Staff, and the Board of Directors.

Appendix I

Development Related Statements

This addendum lists a number of suggestions or ideas as presented by the member respondents during the survey process. Not all are presented as complete sentences, but they reflect the idea in the form and structure as verbalized by the respondent.

- a." We need to have two or three programs going at one time targeting different strata."
- b. "People give to people."
- c. "The gift is to the person making "the ask."
- d. "We need to figure out why people do not participate in our donor program"
- e. "Chapters should give more money. How do you get them to give more money-they need to give something back."
- f. "We need to identify donor prospects. The donor expects something in return."
- g. "You cannot have a good development program if you do not have data on your ask group."
- h."Must have quality presentations-people are a lot more willing to give if they are dealt with in a professional manner."
- i. "Most large donations are realized by a wealthy contributor who believes in the cause, donates a large sum, and then goes out and talks to his wealthy friends into making large contributions"
- j." Your chances of getting money will be enhanced if you make some changes. Be more frugal."
- k."I suggest you consider advertising the School of Horology in Great Britain. CLOCKS magazine has about 550 subscribers. People are always complaining about the quality of instruction being offered in Britain and they love to come to America"
- l." My experience is that schools create a list of targets and develop a budget for each project and decide what they want to accomplish-a target. Then the development staff prepares a sales pitch for the project. Then they take some time and field-test the concept. Once the target has been defined and the marketing approach field-tested,

they usually approach a couple of pre-identified donors to make sizable contributions before they go to the public for donations”

I. “An improved relationship with the local Columbia community needs to be developed”.