Botanical Society of America  
Fundraising Plan Outline

The Botanical Society of America is THE premier professional society dedicated to promoting the study of plants and the universal understanding and appreciation of their role in both the natural and man-made world. To move this mission forward more aggressively, several adjustments in how we do business need to be made:

- Function more as a typical, mission-driven non-profit organization rather than only as a professional society;
- Increase staffing to implement the expanded programs and outreach necessary to accomplish this goal; and,
- Provide increased financial support for these programs, the increased staffing, and the development of professional botanists for the future.

In 2000, BSA leadership produced a Strategic Plan that identified numerous opportunities that would move the organization in this direction.

In 2001, the Board of BSA began this transition by prioritizing these opportunities and developing a timeline for implementation. One of the most important steps was approving the hiring of an Executive Director for the society. In addition, the board embarked on a multi-year fundraising initiative to provide increased financial support for staff and programs.
Fundraising Plan

The following outlines the specifics of the fundraising plan to be implemented over the next several years.

Annual Funding

Increase Annual Funding

Overview

To achieve growth in annual funding, a non-profit organization typically takes the following approaches:

1. looks at how to increase the prospect pool, finding those who might contribute but are not currently affiliated with the organization, and
2. looks to its current house files – of members, donors, and prospects – and initiates ways to encourage more philanthropy from those individuals.

In larger organizations both approaches are followed simultaneously. In smaller organizations, especially those with house files with a favorable ratio of affiliated member/donors in relation to the size of their prospective audience, the best way to grow the annual fund is to find more and better ways to approach the house file.

For this reason, we recommend that the Botanical Society approach its house file in ways that motivate its member/donors to give. These current member/donors, as well as others on the Society’s house file, should be your best prospects.

Strategy

Currently the Botanical Society has an active member program with distinct and attractive offerings to motivate the target audience of botany professionals to join and renew each year. However, there has not been an attempt to encourage those professionals to give an additional gift to the Society. They have not given because they have not been asked to give. The solution to bringing in additional funds is to ask. But
asking is not enough. Prospects must be asked in a way that is compelling and motivating. They must see that their gift matters, and matters in a way that touches a cord within.

To make this initial Botanical Society request for funds as effective as possible, and as easy as possible for the Society to produce and mail, we recommend that the request be included within the current membership renewal package.

Members will be asked to renew, and at the same time they will be asked to give an additional gift to support several key, compelling programs that genuinely need their help to survive. One compelling program is registration and travel support for graduate students to attend the annual meetings. Another important area for increased support is educational outreach to K-12, to make botany a continued part of the science curriculum and provide resources for teachers to make botany an appealing part of their classroom instruction. A third area often mentioned as deserving of additional support is Dissertation Awards, to support field supplies and travel and for laboratory costs such as SEM time.

For members to understand at a glance that they are being asked to renew and to give an additional gift, letter copy will be written with a specific emphasis.

**Proposed Package**

How best to make the request as compelling as possible? We propose that members are asked to give a gift of $50 or more to be affiliated with a group called the Botanical Friends. (We understand there are many technical areas of affiliation for botanists and thought it best to keep the society name quite generic. If there is another generic name that is more appealing, we are very open to those suggestions.)

By becoming a Botanical Friend, you will receive appropriate recognition for varying levels of commitment. Annual gifts will be requested in the amounts of $50, $100, $250, $500, $1,000, and other. Within all aspects of this combined membership
renewal and additional fund request package, the first emphasis will be on a member renewing, with the request for an additional gift being the second step a member should take to support their important professional society.

Recognition for those making an additional gift will include: recognition within a publication at the Annual Meeting; recognition on the Society’s web page for a specific time (6 months); and for those who make a gift of $1,000 or more, public thanking at the Botanical Society’s Annual Meeting, with permission from the donor.

**The Letter and Package**

See the attached Appendix A for letter text and reply form copy. All the copy should be reviewed carefully by the Botanical Society for appropriate expression regarding your organization. We welcome your comments and input.
Gift Acknowledgments for Annual Fund

Establish New Gift Acknowledgment Process

Overview

By creating a new Botanical Friends category of giving, it will be important to establish an appropriate process for thanking these donors. Their stewardship must include building a relationship between them and the Society’s leadership so they feel truly appreciated and thanked for this added measure of support. All their promised benefits must be delivered and additional opportunities must be taken to draw them closer to the Society so they will want to continue to give this kind of critical additional support.

Strategy

We propose that the Botanical Society follow this strategy in developing a long-term relationship with Botanical Friends:

1. New Botanical Friends gifts are to be acknowledged within 5 days of receipt by a thank you letter from the Society’s offices.
2. Within two weeks they must receive a second thank you, with a hand written note, which comes from the President.
3. All promised recognition must be delivered (web page; annual meeting etc).
4. Six months after gift is received another letter, signed by the President, should be sent giving updates on the programs Botanical Friends are supporting.
5. At some point during their year, Friends should be mailed an article that would be of interest, or a news clipping. This can come from the Society’s offices.

All these interactions will serve to keep the Society in front of your donor, and will increase the likelihood that they will rejoin the Botanical Friends when asked.
Future Growth for Annual Fund

Increase Pool of Donor Prospects

Overview

Our recommendation for future growth is based on the Society needing to expand the pool of prospects who will find membership in the Society appealing. For this reason we believe that an affiliates program must be developed. The affiliates program will target non-botanists who are in fields that are sufficiently related to botany that they feel they are receiving a valuable benefit by saying they are an affiliate member.

Strategy

To make affiliate membership something to “achieve,” we recommend that affiliates must “qualify” for membership. This can be as simple as declaring they have worked actively in their field for a certain time, or have certain lay experience that provides them with a background that fits them for this membership, or they are currently a member of AABGA or another horticultural or ecological society.

Affiliates will join at a reduced rate and receive publications that are attractive to a lay, rather than a professional botanist. This will necessitate the Society’s developing a new series of less technical pamphlets or publications to distribute or modifying the Plant Science Bulletin to appeal to this audience. They might also receive a certificate to display in their office that declares that they are an affiliate member.

Corporate Support

Another area of annual fundraising that will be addressed in 2003 is the participation of corporate sponsors. Companies who underwrite aspects of the annual meetings, advertise in AJB, and manufacturers of scientific equipment and supplies (microscopes, chemicals, lab supplies, etc) will be approached about giving to the Society – or increasing their current support. Part of refining this strategy will be to identify areas of expanded visibility for those who do provide support; one such area could be website branding.
Timeline for FY 03

August 2002:
Deliver proposals for new Botanical Friends program
Finalize letter copy and offer for new combined renewal annual fund request

September 2002:
Develop follow-up package for combined renewal annual fund request

October 2002:
Mail first combined Renewal/Friends package
Initiate new stewardship program for Friends

November 2002:
Mail follow-up Renewal/Friends package
Continue stewardship program

December 2002:
Continue renewal tracking and stewardship
Begin identifying potential corporate sponsors

January 2003
Develop a list of related associations and areas of professional involvement that might be interested in an Affiliate Membership with BSA.
Begin contacting potential corporate sponsors about the 2003 annual meetings.
Continue stewardship activities
Develop the endowment letter and identify members of BSA to whom it should be sent

February 2003
Continue with above activities and refine timeline for the balance of the year
Endowment

Overview
While all members will be offered an opportunity to make an additional gift toward annual support at the time they renew their membership, typically those gifts will be in the range of $10 to $1000. A separate but coordinated program will be directed at asking a subset of the full membership to consider making a larger (“major”) gift to the endowment fund. For purposes of defining a major gift, donations of $5000 or more will be the goal of this program with an emphasis on encouraging much larger gifts.

Strategy
The target audience for the endowment drive will be members age 50 and older irrespective of the number of years they have been a member of the society. This age is selected because 50 is typically the youngest age that a person might find themselves with discretionary money due to a combination of accumulation, investment success and children out of school. Further screening – e.g. a minimum of x years as a member of the society – does not necessarily provide a cost reduction sufficient to risk the loss of even one donor at this level.

A letter from one well-recognized and admired person will be sent to this target population asking them to consider making a major contribution to the endowment fund and suggesting several ways such a donation might be structured based on gifting appreciated assets and/or using a planned giving instrument such as a Charitable Remainder Trust, life insurance policy, etc. Prospects will be provided a response form to be returned only to the person signing the initial contact letter to enable accurate tracking of responses. The response form will allow for requesting additional materials and more detailed examples of how one can maximize such a gift while minimally impacting cash flow and providing the greatest tax deductibility. The goal is not to obtain a single check of $5,000 or even $10,000 but a gift worth ten times that amount or more.
An axiom of successful fundraising is that “people give to people”. A committee of volunteers will be recruited to follow up the initial letter with a phone call to each and every person to whom the letter was mailed to ask if they received it and do they have any questions about the use of the endowment or the importance of what BSA is undertaking that needs increased funding. Such volunteers will need only to be very conversant with this information, not the tax consequences of planned gifts – that information will be mailed if the donor prospect exhibits any interest in trying to find a way to make a gift. The purpose of volunteers calling donor prospects is to provide that personal connection.

Naming opportunities will be an incentive for some, not for others; however, a list of name recognition mechanisms for various sized gifts will need to be prepared in anticipation of this.

Donor stewardship is also a critical part of the endowment drive. A healthy percentage of significantly large gifts come from donors of much more modest initial gifts who were well thanked and kept closely connected to the organization. It will be important to develop a stewardship policy and process that is staff driven but involves volunteer, peer contact.
Appendix A

Draft Letter Copy: Botanical Society of America Member Renewal with Botanical Friends Ask
8-1/2 x 11” personalized letter

Date

Title First Name Last Name
Address 1
Address 2
City, State Zip

Dear Title Last Name:

I am writing you today to ask you to renew your annual membership in the Botanical Society of America and to invite you to participate in an exciting new program we are launching.

When you renew your membership today, you will continue to enjoy your member benefits in the months ahead: list top member benefits here.

Your membership dues helped fund the Society during a most important year. Thanks to you and other members we have taken a huge step for the future, by moving to our new location and here list the details of the move to the Missouri Botanical Garden.

Because of these exciting new Society ventures that I just mentioned, we have initiated a new program that gives you, and other loyal Society members, the opportunity to give back to your profession by becoming a member of the new Botanical Friends.

By making a gift of $50 or more over and above your member dues, you will be joining the Botanical Friends and making a very real difference to the future viability of our profession. Funds from the Friends will go directly to list here the programs they will support. As you can tell, these funds are very necessary and you will have the satisfaction of knowing you have given back to your profession in a vital way, at a vital time.

To thank you for this additional support your name will be listed on a special Botanical Friends page in the Annual Meeting Program and on our web page, and all donors of $1,000 or more will be thanked during the list special event here at the Annual Meeting. It’s our way of showing our appreciation for your generosity.
So please, take the time now to renew your Botanical Society membership today and give back to your profession by joining the new Botanical Friends. Your extra generous support means a great deal to us.

Sincerely,

Name
Title

Reply Form Copy
(format to be determined based on internal computer capabilities)

Yes, Please renew my Botanical Society Membership today.

Box $ XX
Box $ XX

Yes, I wish to join the new Botanical Friends. I understand my gift to the Botanical Friends will support new initiatives in Botany Education, and is tax deductible as a contribution to a non-profit organization.

Box $ 50
Box $ 100
Box $ 250
Box $ 500
Box $ 1,000
Box $ _____ Other (Every gift counts!)

Include other copy, such as return address, who to make check to, contact phones etc, as is normal with the response form.

Outer Envelope
Window or personally addressed

Teaser Copy on Front:

Renew Today!