



**Texas Association of Museums
Fundraising Conference
August 28 - 29, 2017
Fort Worth, Texas**

TAM would like to thank the hosts of the 2017 Fundraising Conference:

The Modern Art Museum of Fort Worth
The Kimbell Art Museum
The Amon Carter Museum of American Art



Join us at 11:00 am on Monday, August 28 for a tour of the Modern Art Museum of Fort Worth given by Senior Curator Andrea Karnes.

And, show your conference nametag to get free admission to all three host organizations after the conference ends on Tuesday!

At the Modern:

Highlights from the Permanent Collection

The Modern maintains one of the foremost collections of modern and contemporary international art in the central United States. Various movements, themes, and styles are represented, including Abstract Expressionism, Color Field painting, Pop art, and Minimalism, as well as aspects of New Image Painting from the 1970s and beyond, recent developments in abstraction and figurative sculpture, and contemporary movements in photography, video, and digital imagery.



Richard Long, *Cornwall Summer Circle*, 1995
Cornish slate from Delabole, 189 inches diameter
Collection of the Modern Art Museum of Fort Worth,
Museum purchase, Sid W. Richardson Foundation Endowment Fund

Summary Schedule

Monday, August 28 - Modern Art Museum of Fort Worth

All events are in the auditorium unless otherwise noted

10:30 am	Registration desk opens Lobby
11:00-11:30 am	Tour of the Modern
12:00-1:15 pm	Keynote Luncheon Café
1:15-1:30 pm	Break
1:30-3:00 pm	Planning a Successful Fundraising Campaign
3:00-3:15 pm	Break
3:15-4:45 pm	Corporate Partnerships
5:00-6:30 pm	Cocktail Reception Amon Carter Museum of American Art
7:00 - 9:00 pm	Dinner Reservations - Fort Worth cultural district Sign up at registration desk

Tuesday, August 29 - Kimbell Art Museum

All events will be held in the Renzo Piano Pavilion

8:00 am	Continental Breakfast Begins
8:30-9:15 am	Donor Advised Funds
9:15-9:30 am	Break
9:30-10:45 am	Individual Giving: One Size Does Not Fit All
10:45-11:00 am	Break
11:00-12:00 pm	Special Event Fundraising

Co-Chairs of the 2017 TAM Fundraising Conference are:

Angie Bulaich, Head of Development, Kimbell Art Museum
and

Allie Nikolaisen, Director of Development, Modern Art Museum of Fort Worth

12:00 - 1:15 pm

**Keynote Luncheon
Café**

Diana Duke Duncan Principal, Diana Duke Duncan LLC

Leadership is about creating the circumstances for creativity.

Joe Andrews

Global Chairman of Dentons, a law firm



Diana Duke Duncan has led transformational change in three museums over 30 years, although she didn't set out to build a career in museums or in change management. She will explore the characteristics of leadership based on her personal entrepreneurial spirit that seeks challenges and creates solutions, and on her track record of building environments, cultures, and circumstances where creative people thrive.

Diana Duke Duncan, Principal of Diana Duke Duncan LLC, held leadership positions in development and external affairs in museums from 1985 until 2015. After serving the Barnes Foundation in Philadelphia 2008-2015 as a leader of its transformational change, she established DDD LLC in 2015 to provide bespoke advancement, campaign, management and governance counsel to museums. Clients have included Smithsonian Institution, Glenstone, Virginia Museum of Fine Arts, National Museum of Women in the Arts, Oklahoma Contemporary Arts Center, and American Alliance of Museums.

In 2008, she was appointed Senior Vice President for External Affairs at the Barnes to establish a professional advancement office, integrating a capital and endowment campaign and annual giving; audience development, visitor services and membership; special events; and marketing and communications. By 2012, the Barnes exceeded its \$200 million campaign goal; planned and constructed a LEED Platinum, Tod Williams Billie Tsien/Laurie Olin campus; tripled the annual operating budget; increased membership from 390 to 25,000 households; and opened to critical acclaim in Center City Philadelphia on time, under budget and without debt. In 2000, Ms. Duncan was recruited by John R. Lane to the Dallas Museum of Art, where she served as Director of Development with Jack and Bonnie Pitman. From 2000-2008, the DMA completed a \$185 million Centennial Campaign for endowment, building renovation, and program expansion during a period of dramatic artistic growth, community engagement, and Trustee advocacy. From 1985 to 2000, she served the Smithsonian Institution, a complex national museum with a decentralized institutional advancement model, where she supported the priority fund-raising initiatives of the Board of Regents, the Secretary, and the volunteer Smithsonian National Board.

1:15 - 1:30 pm BREAK

1:30 - 3:00 pm Planning A Successful Fundraising Campaign

It seems like most organizations are either closing a campaign or making plans for a new one. Whether you are asking for money to support a redevelopment, a new gallery, education projects, acquisitions or temporary exhibitions, fundraisers must strategically deliver campaign objectives to the targeted donor pool to effectively persuade them to contribute the necessary funds.

Most successful campaigns have less to do with ‘contacts’ and more to do with good planning and a narrative that explains how you plan to meet the needs of the institution.

Our panelists will offer insight into the strategic planning process, the importance of board leadership, identifying a donor base, and realistic goal setting and expectations. Also, attendees will get some great stats and tools to use as benchmarking when making a case to campaign or not when they return to their organizations.

Speakers:

Allie Nikolaisen, Director of Development, Modern Art Museum of Fort Worth
Native Texan and avid art enthusiast Allie Nikolaisen has served as the Director of Development at the Modern Art Museum of Fort Worth since summer 2016. Before coming to Fort Worth, she served as the Director of Capital and Major Gifts at the Menil Collection, where she oversaw the institution’s first comprehensive campaign, and as Director of Annual Programs at the renowned Museum of Fine Arts, Boston. She managed that museum’s upper-level individual giving program and also served as a member of the senior team spearheading the MFA’s capital campaign efforts. Prior to that, Allie managed all aspects of the Director’s Circle membership operations at The Institute of Contemporary Art, also in Boston.

Amy Purvis, Chief Development Officer, Museum of Fine Arts, Houston
Amy Purvis is chief development officer at the Museum of Fine Arts, Houston, the largest cultural organization in the state of Texas. As a member of the executive leadership team, Amy oversees all fundraising efforts for the Museum and its entities: the Glassell School of Art, Bayou Bend Collection and Gardens, and Rienzi. She is also currently leading Houston’s Hub for All Things Cultural: The Campaign for the MFAH, a \$450 million capital and endowment campaign to transform the Museum’s 14-acre central campus. A twenty-plus-year veteran of the nonprofit fundraising profession, she has served the MFAH for over 15 years.

Kathy Shannon, Executive Director, Permian Basin Petroleum Museum
Native to Midland, Kathy began her career in museums as a volunteer for several local organizations before joining the Petroleum Museum as Director of Education and Programs in 1995. In that capacity, she initiated the Family Science Night and Halloween Tricks and Treats programs, as well as several other educational and outreach initiatives. She was selected as the Museum’s Executive Director in 2004, and began her tenure by completing the design and renovation of the Museum’s Education Hall, which opened in 2006. She has also overseen the construction of the Museum’s Mineral Gallery, opened in 2012, and an \$18 million dollar renovation of the petroleum exhibits, which opened in 2016. She graduated from Texas Tech University with a Bachelor of Fine Arts and has served as a board member of the Junior League of Midland, the Midland Chamber of Commerce, and the Texas Association of Museums.

3:00 - 3:15 pm BREAK

3:15 - 4:45 pm Corporate Partnerships

Corporate partnerships today demand and require constant cultivation, care, and customization. For the most part, gone are the days of big, “splash” corporate sponsorships for Museums. Simply put, the game has changed. The good news is there is still an abundance of ways to attract, garner, and grow support from international, national, and smaller, local businesses that have a stake in your community and an interest in your Museum. Speakers will provide honest lessons learned from years of exploring the new landscape of corporate giving since the 2008 financial crisis, as well as strategies and programs you can implement to connect with corporate business and showcase and leverage your Museum as a cultural entertainment venue with great appeal for their clients, employees and families.

Speakers:

Angie Bulaich, Head of Development, Kimbell Art Museum

Angie Bulaich has held the position of head of development at the Kimbell Art Museum since 2012. In her time at the Kimbell she has created the Museum’s first-ever corporate membership and sponsorship programs and manages foundation and government grants. With the opening of the Renzo Piano Pavilion expansion in 2013, she has created and maintained the Museum’s special event rental policies and revenues. Prior to coming to the Kimbell, she was the community outreach manager for the North Texas Super Bowl Host Committee for the region’s first-ever hosting of the National Football League’s championship game. She started her development work in 2004 at the Dallas Center for the Performing Arts Foundation (now ATTPAC), as assistant to President and CEO Bill Lively, who managed a capital campaign that raised \$338 million. She lives in Fort Worth with her husband Nick and their children Charlie (10) and Lily (6).

James Jenner, Director of Development, Dallas Summer Musicals

Jenner has carved out a twelve year career as a nonprofit development professional with expertise in corporate sponsorship and contributions, foundation and government grants, and major gift and individual giving/membership programs. He cut his teeth at the Dallas Museum of Art as a Development Writer/Grants Manager, mentored by Diana Duke Duncan and Bonnie Pitman. Two of his professional passions are “putting the business into nonprofit business” through partnerships and collaborations and “spotlighting the heart in art” by creating community access, education, and outreach programs and projects for philanthropic investment. Jenner has held development roles at Dallas Area Habitat for Humanity, the Fort Worth Museum of Science and History, and Junior Achievement of Dallas. He is currently Director of Development at Dallas Summer Musicals in the heart of Fair Park, Texas. A native of Grosse Ile, Michigan, an island community south of Detroit, he attended Wayne State University, where he earned a Bachelor of Arts in English, with emphasis on American Literature and American Studies.

Scott Orr, CFA, Vice President of Public Affairs, Fidelity Investments

Scott is Vice President of Public Affairs for Fidelity Investments, returning to Fidelity six years ago to serve in this role. He is a member of the Texas executive leadership team and is responsible for all of Fidelity’s regional governmental relationships at the local, state and federal levels, working closely with Fidelity’s Washington-based team. He also oversees Fidelity’s civic and community relations efforts, including volunteerism for its more than 6,400 Texas-based employees and working with its strategic nonprofit partners and other philanthropic efforts. In Scott’s original career with Fidelity Investments, he worked for 12 years as portfolio manager and money market group leader in the fixed income department of Fidelity Management & Research, managing over \$11 billion in money market mutual funds. He currently is a member of the Dallas Citizens Council and serves on the boards of the Dallas Regional Chamber, Fort Worth Chamber, North Texas Commission, CNM Connect, Dallas CASA, Dallas Theater Center, The Cliburn, Public Affairs Council, TTARA and Abilene Christian Investment Management Company. Scott is a Chartered Financial Analyst and earned a BBA degree in accounting from Abilene Christian University and an MBA from Harvard Business School.

5:00 - 6:30 pm Cocktail reception - Amon Carter Museum of American Art

At the Amon Carter:

During the cocktail hour, enjoy the first floor galleries of the Amon Carter Museum of American Art. Artworks you will see include: a large mural by Stuart Davis titled 'Swing Landscape,' two galleries filled with works by Russel & Remington, a video installation titled 'Hue the Hunter,' and abstract Texas midcentury modern paintings. The north wall in the main gallery also showcases 'TRACE' by Darryl Lauster, a work in which he created Carrara marble tablets that look as though they fell from some ancient structure, "alluding to the possibility of an empire in its potential decline." Passing through the atrium space (where the reception will be held) will bring you to the sloping gallery, which features 15 large scale photographs by Dornith Doherty. At the exit of the sloping gallery, on the wall above, you will see Plexus No. 34 - an amazing installation by Gabriel Dawe which ultimately looks like an indoor rainbow.

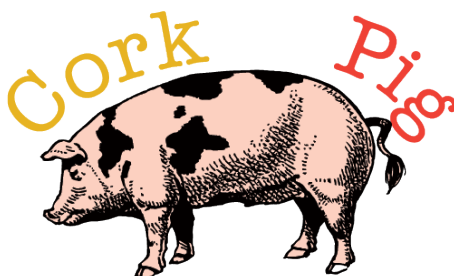


7:00 pm ***Dutch Treat Dinner - join a group reservation!*** *Sign up at the Registration Desk*

- * Rodeo Goat - specialty burgers and craft beers
- * Gloria's Latin Cuisine - Tex-Mex and Salvadoran food, mojitos, & margaritas
- * Cork & Pig Tavern - wood-fired pizzas with an extensive wine list
- * HG Sply Co. - varied natural food menu with gluten & dairy free options
- * Pacific Table - Pacific Northwest seafood, 25% off bottles of wine on Mondays

RODEO GOAT
I C E H O U S E

PACIFIC TABLE
FT. WORTH, TX EST. 2013



8:00 am Continental Breakfast begins in the lobby

8:30 - 9:15 am Donor Advised Funds

Though Donor Advised Funds (DAFs) have been around in some form since the 1930's, these charitable entities have risen to the top of the philanthropic charts at a strident pace since the 1990's, when brokerages and banks established charitable divisions to propel DAFs' popularity as a source of charitable gifts year-over-year. Considering DAFs are now among the preferred choice of giving vehicles with some of the wealthiest of donors, combined with the sustained growth in both the number of new DAFs and the number of individual DAF accounts, museum and philanthropic advisors must work together to assure their investors/patrons are stewarded correctly. Join professionals in all areas of DAF management for an engaging conversation about preserving and strengthening important relationships to assure win-win results for all.

Speakers:

Billy Fong, Executive Director, Texas Association of Museums (Moderator)

Billy Fong began his tenure as Executive Director of TAM in February, 2016. He has held posts at museums around the country including the Wadsworth Atheneum Museum of Art (Hartford, CT), Los Angeles County Museum of Art, Fort Worth Museum of Science and History, High Museum of Art (Atlanta, GA) and the Dallas Museum of Art. His focus has primarily been external affairs, fundraising, and marketing. Originally from Florida, Billy earned his BA from University of South Florida and did his graduate work at City College/City University of New York. It was during his tenure at the High Museum of Art that he was nominated and accepted in the Getty's prestigious Museum Leadership Institute. This intensive management program, in its 37th year, is for CEOs, Directors, COOs and senior-level executives who influence policy, effect change and is aimed at helping experienced executives become better leaders to strengthen their institution's capabilities.

Rose Bradshaw, Executive Vice President, North Texas Community Foundation

Over the course of her career, Rose has worked with philanthropists, foundations, corporations and nonprofits in San Francisco, New York and Chicago develop and enhance strategic relationships. She now oversees the North Texas Community Foundation's philanthropic investments to ensure they effect positive change in the community while honoring donor intent. Rose collaborates with other funders, community groups and civic leaders to advance targeted initiatives, including the Early Learning Alliance, Foster Care redesign, Safe Sleep Public Health Campaign to combat infant mortality, and the Fort Worth literacy partnership. She also oversees the Community Foundation's grant cycles focused on early learning, child abuse, land conservation and animal welfare, among others. Rose serves on the Mayor's Education Cabinet, Women's Policy Forum Board of Directors, Asset Funders Network Steering Committee, and Leadership ISD, among other civic engagements. She is a graduate of Loyola University Chicago.

Allie Nikolaisen, Director of Development, Modern Art Museum of Fort Worth

Native Texan and avid art enthusiast Allie Nikolaisen has served as the Director of Development at the Modern Art Museum of Fort Worth since summer 2016. Before coming to Fort Worth, she served as the Director of Capital and Major Gifts at the Menil Collection, where she oversaw the institution's first comprehensive campaign, and as Director of Annual Programs at the renowned Museum of Fine Arts, Boston. She managed that museum's upper-level individual giving program and also served as a member of the senior team spearheading the MFA's capital campaign efforts. Prior to that, Allie managed all aspects of the Director's Circle membership operations at The Institute of Contemporary Art, also in Boston.

Dana Stayton, Partner, Kelly Hart & Hallman Attorneys at Law

Dana M. Stayton advises clients in the initial organization and ongoing operation of non-profit organizations and charitable trusts, and counsels clients concerning obtaining and maintaining exemptions from federal income tax, state franchise tax, sales and use tax, and ad valorem tax. She represents buyers and sellers of art in domestic and international transactions; negotiates complex acquisition, sale and auction transactions; and provides counsel concerning claims with respect to the return of stolen or illegally exported art. She also advises high net worth individuals concerning estate planning matters and counsels clients concerning charitable giving. Ms. Stayton is active in various community organizations including the Caribbean Wildlife Alliance, the Texas Bar Foundation, Leadership Fort Worth, and the Junior League of Fort Worth.

9:15 - 9:30 am BREAK

9:30 - 10:45 am Individual Giving: One Size Does Not Fit All

Museums are challenged to identify, cultivate, and retain loyal donors. It is a long held belief that the majority of charitable gifts come from foundations, corporations, or other entities. However, long standing research by Giving USA shows that individuals account for the great majority of charitable gifts to organizations. The question becomes why do individuals give? Why do they stop giving? Do they prefer to give on-line, by mail, or face-to-face? Do they prefer to give monthly or once a year? IN SHORT, HOW MUCH DO YOU KNOW ABOUT YOUR INDIVIDUAL GIVING DONORS? With the recent influx of evidenced-based research, fundraisers have access to valuable data that assist in understanding individual donors. Historic and current data regarding giving to the cultural organization sector will set the stage for learning about individual giving, including types of individual donors, channels available for giving, methods provided for individual giving, finding new prospects, face-to-face solicitations and donor relations. As these segments come together, your knowledge and ability to build your individual giving program will be enhanced.

Speakers:

Caren Handleman, Director of Advancement, Episcopal School of Dallas

Caren Handleman, Ed.D., has worked in development and advancement for more than 30 years. She served the Museum of Flight (Seattle, WA) as vice president of development and external affairs and the Fort Worth Museum of Science and History as associate vice president of development. In addition to her museum experience, she has worked in development at universities and independent schools. Her responsibilities and expertise include individual and major gifts, corporate and foundation relations, government grants, constituency relations, advancement services, communications, and marketing, all at the hands-on, managerial and executive levels. She earned her BA at the University of Kansas, MPA at the University of Nebraska-Omaha, and EdD at Nova Southeastern University (Florida).

M. Ann Abbe, Nonprofit and Fundraising Consultant, Abbe & Associates

M. Ann Abbe has more than 30 years of professional fundraising/ philanthropic career, primarily focused on the success of universities and nonprofit organizations. She has served as vice president for development for The University of Texas at Arlington, associate vice president and vice president for development at the University of North Texas, director of development for KERA Public TV/Radio, director of operations at the Presbyterian Communities & Services Foundation, and others.

As a consultant, Ann has assisted dozens of nonprofit organizations and universities, including Allied Theatre Group (Fort Worth), Arlington Museum of Art (Arlington, TX) and The Women's Museum (Dallas). She is expert in implementing pre-campaign feasibility studies/campaigns, creating and implementing strategic plans and organizational assessments, amongst other fundraising skills. Ann has often spoken at conferences across the country, sat on various community nonprofit boards and authored several articles on cultural philanthropy. She has a BA and MA from Texas A&M University.

10:45 - 11:00 am BREAK

11:00 am - 12:00 pm Special Event Fundraising

Many museums host events annually to help achieve their fundraising goals. These can take the form of black-tie galas, luncheons and/or golf tournaments. The industry standard many years ago was to strive for an expense-to-revenue ratio of 30%. Has this number changed over the last decade? Are there new hard costs to keep in mind? How can one share this type of information with your volunteers/Board to potentially caution them from initiating another “special event fundraiser” or to encourage them to succeed.

Christina Cavalier will share details of the Perot Museum’s annual fall gala, including the sponsorship benefits they provide and the hierarchy used for individual donors. She will be joined by Christina Geyer, who represents Paper City Magazine, a local Dallas publication that is the media sponsor for the Perot’s gala. Christina will address the question of “what makes for a mutually beneficial relationship” between a non-profit and a private sector media partner.

Speakers:

Christina Cavalier, Vice President of Development, Perot Museum of Nature & Science

Christina has been with the Perot Museum since February 2013 when she was hired to manage the Perot Museum’s corporate giving. She is now responsible for overseeing the Museum’s fundraising efforts. Prior to joining the Perot Museum, Christina worked in development at the North Texas Food Bank and Dallas Children’s Theater. She has a Bachelor of Business Administration from Millsaps College and an MBA in Marketing and MA in Arts Administration from Southern Methodist University. Christina and her husband live in McKinney with their daughter.

Christina Geyer, Editor-in-Chief, Dallas, Paper City Magazine

Christina Geyer is the Editor in Chief of PaperCity Magazine Dallas. She is the former managing editor of FD Luxe, the Dallas Morning News’ luxury lifestyle magazine and the founding editor of FD Love, the paper’s inaugural wedding magazine. Christina began her career in magazines at PaperCity, where she started as an intern before being promoted to assistant editor. A graduate of Southern Methodist University, Christina holds a bachelor of arts in journalism and a minor in art history. During her time at SMU, she co-founded the website, SMU Style, a lifestyle and fashion blog targeting college students. Today, SMU Style remains an active, student-run digital publication. Christina is active in the community and is a former president of the Dallas Symphony Orchestra’s Vivaldi Patron Circle; a founding president of The Salvation Army’s Echelon organization, which launched in Dallas and now has multiple chapters across the country; and she has served on the boards of The Family Place’s Helping Hands, Dallas Children’s Advocacy Center and the Vogel Alcove’s Young Adult Committee.

At the Kimbell:

Casanova: The Seduction of Europe

AUGUST 27-DECEMBER 31, 2017

On view in the Louis Kahn Building

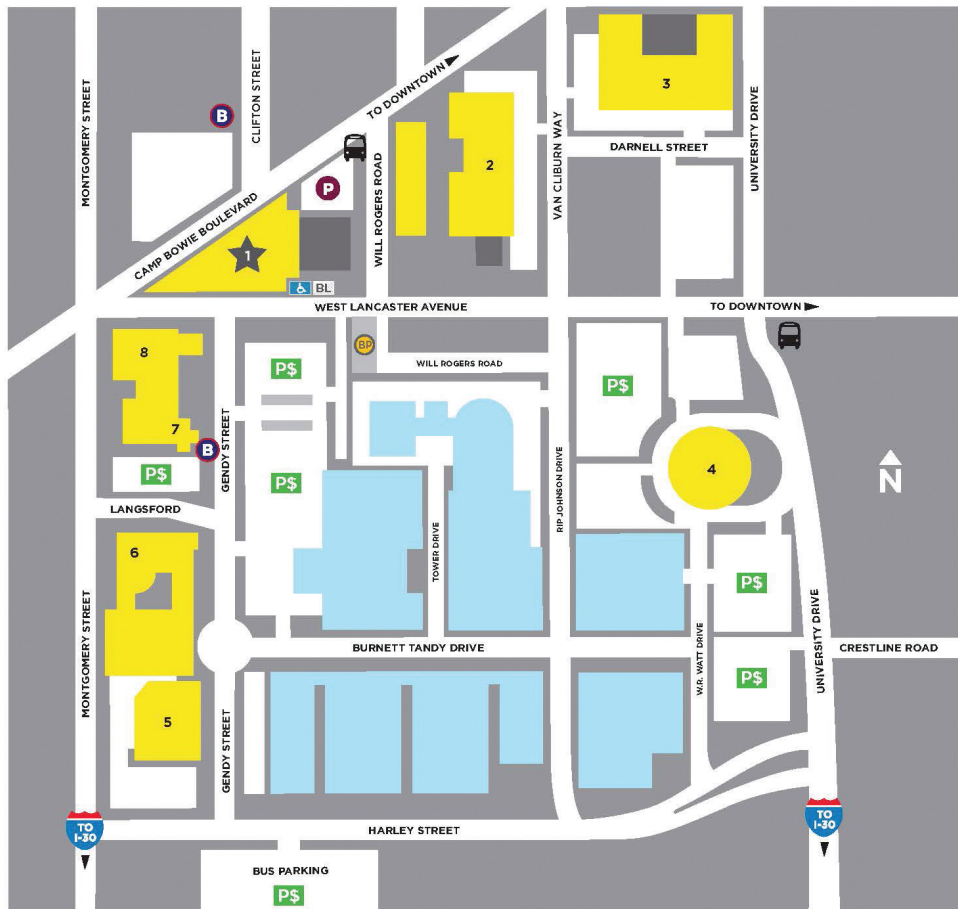
This exhibition will feature approximately 200 works of art, including paintings, sculpture, drawings, prints, furniture, metalwork, porcelain, costumes and musical instruments. Together, they will illustrate the splendor of mid-18th-century Europe, gently structured around the chronology, geography and major incidents of Casanova’s life, and will address such themes as travel; courtship and seduction; theatre, identity and the mask; and the pleasures of dining.

The exhibition is accompanied by a full-color catalogue, *Casanova: The Seduction of Europe*, available for \$45 in the Museum Shops. The exhibition is organized by the Kimbell Art Museum, the Fine Arts Museums of San Francisco and the Museum of Fine Arts, Boston. Promotional support is provided by American Airlines, the Fort Worth Star-Telegram and NBC5.



Jean-Marc Nattier (French, 1685–1766)
Manon Balletti, 1757
Oil on canvas
21 1/4 x 18 3/4 in. (54 x 47.5 cm)
© The National Gallery, London.
Bequeathed by Emilie Yznaga, 1945

FORT WORTH CULTURAL DISTRICT MAP



DIRECTORY

- 1 Amon Carter Museum**
3501 Camp Bowie Blvd. / 817.738.1933
- 2 Kimbell Art Museum**
3333 Camp Bowie Blvd. / 817.332.8451
- 3 Modern Art Museum of Fort Worth**
3200 Darnell St. / 817.738.9215
- 4 Casa Mañana**
3101 W. Lancaster Ave. / 817.332.2272
- 5 National Cowgirl Museum and Hall of Fame**
1720 Gendy St. / 817.336.4475
- 6 Fort Worth Museum of Science and History**
1600 Gendy St. / 817.255.9300
- 7 Fort Worth Community Arts Center**
1300 Gendy St. / 817.738.1938
- 8 W.E. Scott Theatre**
3505 W. Lancaster Ave. / 817.738.1938
- 9 Will Rogers Memorial Center**
3401 W. Lancaster Ave. / 817.392.7469

PUBLIC TRANSPORTATION AND PARKING

- Accessible Parking
- Bus Loading Zone
- Free Public Parking
- Free Bus Parking
- Paid Public Parking
- Bus Stop
- Fort Worth Bike Sharing

