



Fund Development Assessment and Action Plan Report for the  
Fort Monroe Authority Board of Trustees Meeting  
Bay Breeze Conference Center  
April 20, 2017

**Purpose of the Fund Development Assessment**

To help address the Fort Monroe Foundation's (FMF) current proposed funding needs, the FMF Board of Directors and staff selected Mary Ellen Stumpf, Stumpf & Associates, to conduct an assessment of the organization's readiness and potential to raise funds at this early stage of the organization's founding and to provide an action plan. Stumpf has expertise in start-up fundraising programs, particularly for significant historic or cultural sites -- and with state/private organizations.

**Methodology**

Data was gathered from a range of sources: through an extensive review of the overall Fort Monroe's history, operational documents, financials, programs/events, staffing and leadership structure; one-on-one interviews with Board members, staff, and key funding sources; review of other related models such as Jamestown-Yorktown, Preservation Virginia and its Historic Jamestown, Science Museum of Virginia, Virginia Museum of Fine Arts and Foundation, and Library of Virginia.

**Key Findings**

The full report included a detailed analysis of current conditions and readiness on required elements to raise significant funds, especially private sector funds. Briefly, some of the most important findings were: the lack of awareness of the site by strategic audiences and the public at large; the complexity of the site, structure, and scope of needs; how to develop the necessary influential and affluent leadership as a start-up; how to define the best vision for the site and develop sustainability; what is the best business model; and many more operational and fundraising-related findings.

## **Recommendations/Strategic Actions**

### Clarifying Identity/Developing Public Awareness, Audiences and a Giving Constituency

The next five to ten years will be the most challenging period for building awareness, engagement, advocacy, and support because you are young as an organization and there is extraordinary competition for time, attention, and the dollar (and not just in the cultural/historic field but overall). Fort Monroe must develop a very strategic communications and cultivation plan to develop and maintain relationships from those highest priority target groups mentioned earlier.

Given the complexity of the current structure and the overall site, you should refrain from or diminish communications and visual charts that explain or emphasize the various entities – in favor of one identity: Fort Monroe. Fort Monroe should be the only identity or structure mentioned with target audiences or the public at large – unless it is positive or constructive to do so on a case by case basis. Consider the value of a proposed tagline: “The National Center on/for Freedom” vs. the current “Where freedom lives.”

Launch and sustain efforts to define and develop your target audiences for short- and long-term awareness, engagement, and participation in programs, advocacy, and financial support – forming the overall constituency of Fort Monroe.

### Addressing Funding for Immediate/Short-Term Capital and Programmatic Needs

At this initial stage of your development, the stakes are high and readiness to raise private or other public funds is very low. For the next five years, implement a strategy of seeking “working capital” to support the highest priority needs. Define an achievable package of priority capital, programmatic, and capacity-building needs as your Case for Support. This strategy offers select donor sources an incentive to be among first investors and you a focus that ensures success as you develop the organization for greater accomplishment and financial support in the following 5-10 years.

In support of the needs above, focus on engaging a select few major gift and grant sources, who/that: have a history of investing early in cultural or historic sites; understand your nature as a start-up; support the need to secure “working capital” first.

All involved with Fort Monroe must work together in a unified, cohesive manner to engage strategic private sources and to leverage/further state support, and explore NPS and other federal investments – all in a well-planned, coordinated process.

### Establishing the Development Program and Foundation for Future Success and Sustainability

Establish now a strategic development and membership program to build future annual giving, membership, operating grants, sponsorships, planned giving and more for future success and sustainability. To get started, seek a qualified development “generalist” with demonstrated development training and experience. To support his/her efforts and of community relations/marketing, hire an administrative assistant, preferably with development office experience. The database workload and other support functions are extensive.

Fund the start-up of the program using the examples of other models and strategy: secure seed gifts from sources that understand the need for this investment; seek capacity-building grants; use precedence set for other state/private entities with share costs and resources.

#### Developing Leadership for Fulfilling the Vision, Plans and Fund Development

To lead at this point, you need to identify, engage, and support a small circle of volunteer leaders – 3 to 5 highly influential volunteers, key staff, and an experienced professional to manage the process, sources, formal requests follow-up and stewardship.

The work to be done in this next phase is overwhelming and the stakes are high to be successful. To manage well, consider realigning or assigning leadership roles to current or near future staff, board members, or others to be recruited with expertise or connections to key sources of support.

The present concern about developing stronger boards or leadership for fundraising is valid but unrealistic to solve ideally at this point. Implement a process provided by the consultant for developing and evolving the kind of board(s) you need and deserve. Until you have developed greater success, credibility, infrastructure, and engagement of targeted/influential audiences, implement a short-term model for the boards and staff to work together on common objectives.

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