



Team Approach Account Activity Migration Criteria August 25, 2003

Criteria to be used in determining whether an existing Team Approach account with an AM/AI (membership) activity will be changed to AD (major gifts) for cultivation and marketing purposes.

Account is identified as having financial capacity and/or philanthropic intent. In this case, major gifts staff or one or more TPT Trustees have identified an individual or private foundation as a prime major gifts prospect as a result of one or more of the following characteristics:

1. Member of TPT's Board of Trustees
2. Member of TPT's Leadership Team
3. Member of TPT's President's Council
4. Former member of TPT's Board of Trustees
5. Member of TPT's Program Club
6. Member of or top prospect for TPT's Visionary Society
7. Donor of \$1,000 or more annually to one or more arts, civic or nonprofit organizations in our region. In FY04, such organizations may include the Guthrie Theatre, Minnesota Public Radio, Minneapolis Institute of Arts, Saint Paul Chamber Orchestra, Minnesota Orchestra, Science Museum, Minnesota Zoo, the Minneapolis Foundation, the Saint Paul Foundation, and the Minnesota Foundation
8. Current or past member of the One Percent Club, Social Venture Partners, Minneapolis Club, select country clubs
9. A business or community leader identified as a board member, community leader or business leader in print or electronic media, such as major nonprofit annual reports, "Forty Under Forty," Corporate Report's annual "Top 20," or The Business Journal's "Book of Lists", Twin Cities Business Monthly's annual list
10. Account has established a private foundation, donor advised fund, or other formal charitable giving vehicle with assets solely designated for philanthropic purposes
11. Account has given a total of \$1,000 or more within 12-month member year. Includes gifts totaling \$1,000 or more in combination with employer matching gifts. Each account will be reviewed by major gifts staff for premium purchases. AM/AI/AT accounts with a history of largely premium-driven donations will not be migrated to AD. (Immediate action by major gifts staff: account will be migrated to AD and mailed an acknowledgment letter/Studio Society welcome kit. Donor will receive a personal thank you letter from President & CEO within one week.)
12. Account has given \$750 or more in each of last three member years. (Immediate action by major gifts staff: account will be migrated to AD mailed an acknowledgment letter. Account will be included in subsequent major gifts marketing and cultivation efforts for minimum of 24 months.)

The following circumstance will result in existing Team Approach accounts with an AM/AI (membership) activity which would otherwise be migrated to AD (major gifts) for cultivation and marketing purposes for the above reasons, remain in the AM/AI activity.

- Account's donations to TPT have been primarily the result of one or more premium offers, such as Blenko glass or Chihuly glass

The following circumstance will result in existing Team Approach accounts with an AD activity to be migrated to AM/AI.

- Account has not been identified as fitting the description of 1-12 (above), and has not responded with a gift of \$500 or more in any of the past three member years.