



AMERICAN
BRAIN
FOUNDATION



Board of Directors

American Brain Foundation

Minneapolis, Minnesota, June 23, 2019

AMERICAN
BRAIN
FOUNDATION

Call to Order

Kevin Goodno, Board Chair

Kevin Goodno, Board Chair

- Review meeting agenda
- Approve minutes of April 11, 2019 Board of Directors meeting
- Call for disclosure of conflict of interest related to any agenda items

Kevin Goodno, Board Chair

- Bylaw Revisions

Financial Report

Ralph Józefowicz, Treasurer, Tim Engel, CFO

AGENDA

- Financial Statements for 4/30/2019
- Updated 2019 Forecast
- 2018 Audit

Statement of Operations

	2019	2019	Variance Favorable	Total 2019	Total 2019	Budget variance to Forecast Favorable
	<u>YTD Actuals</u>	<u>YTD Budget</u>	<u>(Unfavorable)</u>	<u>Forecast</u>	<u>Budget</u>	<u>(Unfavorable)</u>
REVENUE	1,899,983	1,138,596	761,387	5,251,423	4,815,600	435,823
EXPENSES	647,682	777,101	129,419	5,113,588	5,097,276	(16,312)
Net Operating Increase (Decrease)	1,252,301	361,495	890,805	137,835	(281,676)	419,511
Long Term Investments	<u>485,220</u>	<u> </u>	<u>485,220</u>	<u> </u>	<u> </u>	<u> </u>
CHANGE IN UNRESTRICTED NET ASSETS	<u>1,737,521</u>	<u>361,495</u>	<u>1,376,025</u>	<u>137,835</u>	<u>(281,676)</u>	<u>419,511</u>

April YTD Actuals

ABF YTD Operating net income is \$1.3M



Estate gift windfall of \$945K has contributed to positive net income



April YTD Investment return of 11.2%, resulting in revenue of \$485K



Expenses are 17% under budget due to timing

2019 Forecast

ABF Staff forecast a net income of \$138K, a positive variance of \$420K over the original budget deficit of (\$282K).



Total expenses are not materially different than the original budget



AAN Member Dues Check Off performing 3% over prior year

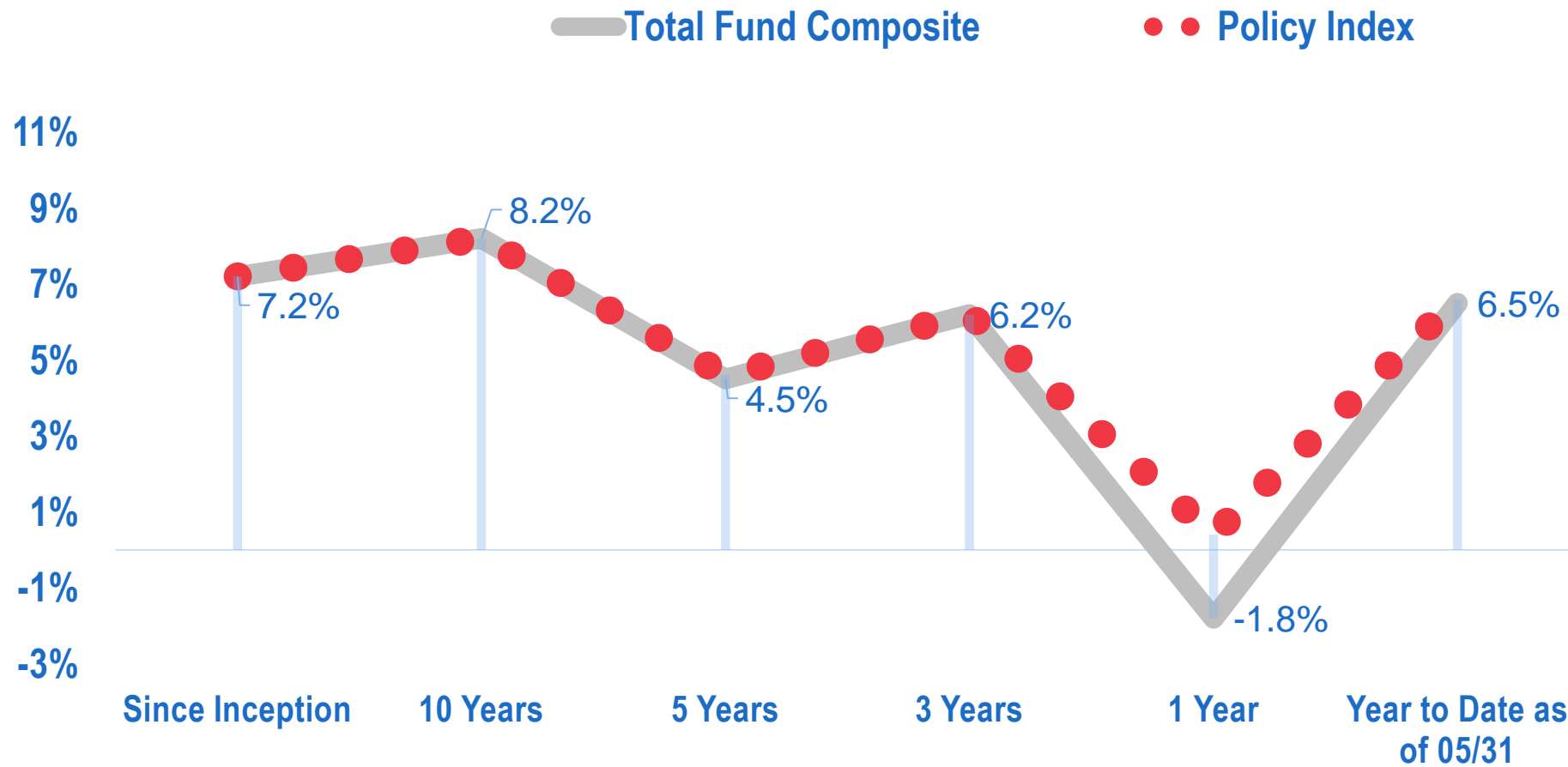


Fundraising goals are forecasted down (10%) compared to original budget

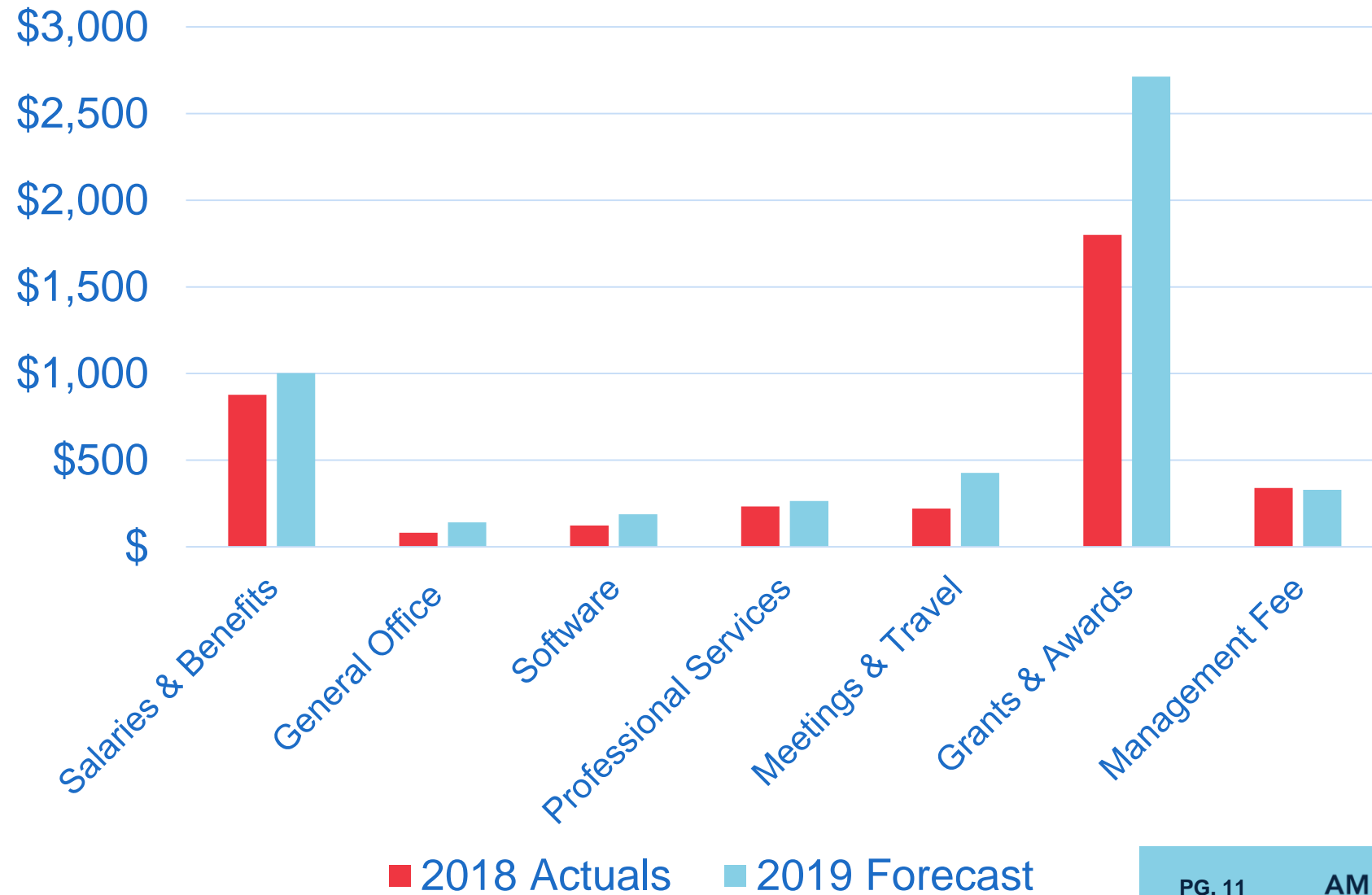


ABF Staff need to raise \$502K to meet the forecasted revenue goals

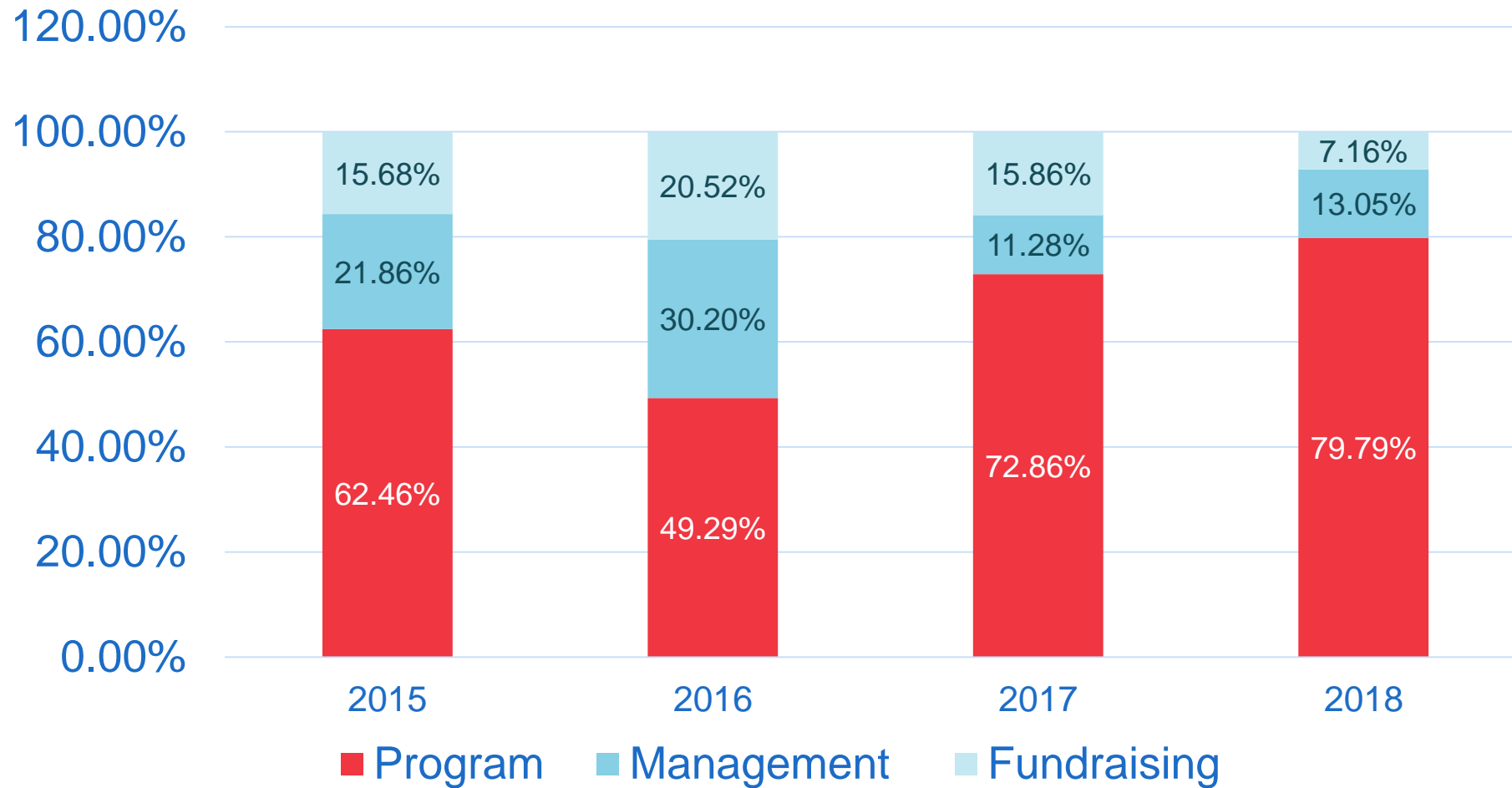
AANI Investments Return



Major Expenses (in thousands)



Functional Expenses



Functional Expenses- Charity Navigator

- Uses 3-year average
- 2015 – 2017 Average (currently on site)
 - 61.7% Programming
 - 21.0% Management
 - 17.2 % Fundraising
- 2016 – 2018 Average (once 990 is filed)
 - 67.3% Programming
 - 18.2% Management
 - 14.5% Fundraising

April Statement of Financial Position

- ABF ended April with total assets of \$13.6M, which includes \$2.4M in grants receivable
- Cash and investments total \$11M
 - \$565K Cash in Bank
 - \$2.8M Short Term Investments
 - \$7.7M Investments Held by AANI
- Liabilities are \$948K, which includes grants payable of \$852K

April Net Assets with Donor Restrictions

	Available for Future Use	Endowments	Total
Awards	\$ 1,034,787	\$ 1,319,031	\$ 2,353,818
Research Grants	\$ 4,081,706	\$ 952,887	\$ 5,034,593
Public Education	\$ 196,633		\$ 196,633
Operational	\$ 139,463		\$ 139,463
	<hr/>		
	\$ 5,452,589	\$ 2,271,918	\$ 7,724,430

2018 Audit

2018 Audit Report

- Financial Audit
- Reviewed by Joint Audit Committee
- Clean, unmodified Opinion issued
- Internal Controls – No issues
- Management Comment
 - Control over cash receipts and checks
 - Repeat comment from 2017
 - Amounts and frequency not material
 - No changes to be implemented
- Accept Reports as issued

New Footnote in 2018

NOTE 2 AVAILABILITY AND LIQUIDITY

As part of ABF's liquidity plan, excess cash is invested in short-term investments, including money market accounts and certificates of deposit. ABF's investment policy establishes a target of holding 40% of the subsequent year's budget in liquid investments. Holding liquid investments in excess of the target is at the discretion of the board of directors and excess balances may be moved to long-term investments. As of December 31 liquid investments held by ABF were as follows:

	2018	2017
Cash and Cash Equivalents	\$ 2,181,474	\$ 2,645,745
Succeeding Year's Budget	5,097,276	4,187,856
Liquid Investments Reserve Percentage	40%	40%
Required Reserve	2,038,910	1,675,142
Excess Reserve	\$ 142,564	\$ 970,603

New Footnote in 2018 – cont.

ABF's Operating Reserve Policy establishes a reserve equal to seventy-five percent (75%) of average of the last two years actual expenses and succeeding years operating budget excluding any grants with donor restrictions and non-cash items. The reserve is reported annually to the board of directors. ABF's December 31, 2018 and 2017 reserves were \$3,192,862 and \$3,440,364 respectively. The reserve requirements were \$1,900,782 and \$2,330,157 indicating that ABF exceeded the policy requirements in 2018 and 2017.

ABF held the following financial assets that are available within one year for general expenditures as follows:

	2018	2017
Cash and Cash Equivalents	\$ 443,488	\$ 931,311
Accounts Receivable (to be received within 12 months)	593,236	684,215
Short Term Investments (CDs)	1,737,986	1,714,434
Funds Held by Others (available within 12 months)	4,760,108	5,774,619
Donor Restricted Dollars	(3,480,382)	(5,038,777)
Total Financial Assets	<u>\$ 4,054,436</u>	<u>\$ 4,065,802</u>

Audit Considerations for 2019

Contributions Standard Changes

On June 21, 2018, the Financial Accounting Standards Board (FASB) issued Accounting Standards Update (ASU) No. 2018-08, *Not-for-Profit Entities (Topic 958), Clarifying the Scope and the Accounting Guidance for Contributions Received and Contributions Made*. This ASU distinguishes between contributions and exchange transactions and assists in determining which guidance to apply. For contributions, the guidance in Subtopic 958-605, *Not-for-Profit Entities – Revenue Recognition*, should be followed. Once a transaction is deemed to be a contribution, this ASU assists in determining whether a contribution is conditional or unconditional, and if unconditional, whether the transaction is donor-restricted for a limited purpose or timing. Conditional contributions are recognized as liabilities if assets are transferred in advance and not recognized as revenue until the conditions have been substantially met. There must be both a right of return and a barrier to payment to be considered conditional. Unconditional contributions are recognized immediately and classified as net assets with or without donor restrictions. The Foundation will implementing this for 2019.

Board Motion

- Accept the Audit Report as prepared

Questions?

Executive Director Report

Jane Ransom, Executive Director

Jane Ransom, Executive Director

PHILANTHROPY

- Bequest \$1.045 M, Estate of Joseph Green, MD, FAAN & Rita Mercille Green
- Sustaining donor campaign “Brain Squad”
- Commitment to Cures 2019: \$410,761 raised, of which \$149,000 was restricted
- Houston: New front for Major Donor fundraising
- Target Analytics
- Endowments
- Crowdfunding for Tourette’s CRTS

Jane Ransom, Executive Director

RESEARCH

- \$4.27 M for research in 2019 and future years
- Granting \$2.37 M for research in July
- Working with partners to spread the word about 2020 research scholarships
- Raising money toward LBD biomarker project with \$1.5 M time-sensitive match from MJ Fox Foundation
- Considering new initiative with funds for autism research
- Application of 10% program fee to CRTS in 2021

Jane Ransom, Executive Director

PUBLIC AWARENESS

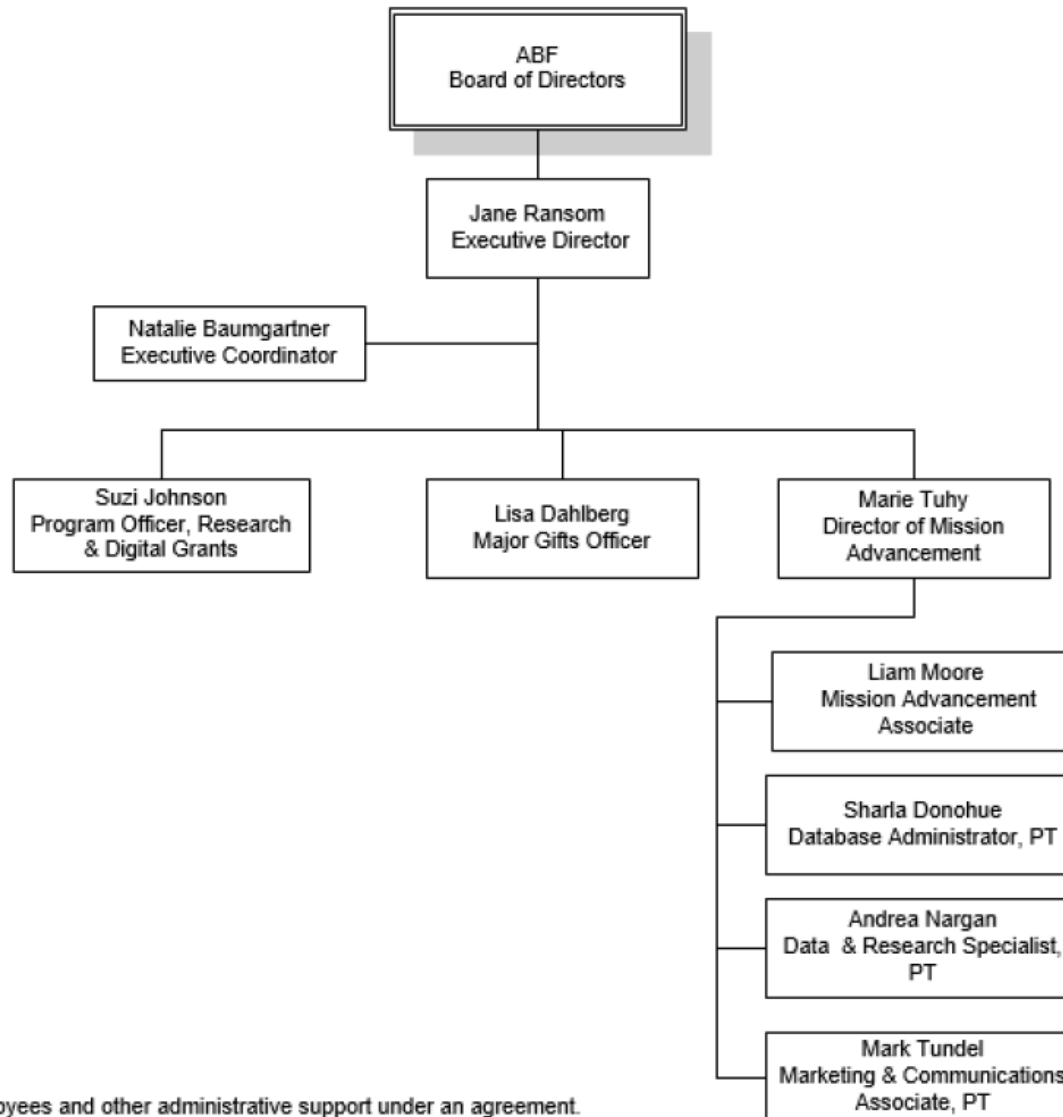
- Website
- Dan Gasby podcasts for ABC77 Radio in NYC
- Increased social media engagement resulting from Annual Meeting booth
- Prepping new crowdfunding marketing strategy this fall

Jane Ransom, Executive Director

THRIVING PARTNERSHIP WITH AAN

- Collaboration with AAN leadership and Executive Staff regarding June 22 presentation.
- Meeting with AAN leadership staff:
 - Evolving research collaboration
 - 2020 annual meeting
 - Sustaining donor campaign
 - Marketing opportunities
- Presentation on current and emerging ABF research initiatives at the Science Committee meeting of June 20th.

American Brain Foundation Organizational Structure



*AAN provides ABF with employees and other administrative support under an agreement.

AAN Board Presentation

Jane Ransom, Executive Director

AAN Board Presentation – Critical Issues

- Use data to tell the story of the Foundation's post-reorganization success
- Level-set the AAN Board's understanding of our history
- Show outcomes and impact since 2015-2016
- Future vision – Two narratives and financial forecasts showing trade-offs



American Brain Foundation

PAST, PRESENT, FUTURE

Minneapolis | June 22, 2019

AMERICAN
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AGENDA

Introduction

Past

- Prior to 2015

Turning Point

- AAN/ABF Decisions

Present

- 2015-Present

Future

- 5-year scale-up scenario
- 5-year conservative scenario

INTRODUCTION

STRATEGIC PLAN – 2017-2021

MISSION

To bring researchers and donors together to find cures for brain diseases and disorders

VISION

Life without brain disease

STRATEGIC PLAN – FOUR STRATEGIC GOALS

1. **RESEARCH**—*Advance a continuum of research by matching the best science with the largest pool of donors.*
2. **PUBLIC ENGAGEMENT**—*Build national awareness around visionary “Cure One, Cure Many” research mission and our unique research partnership with AAN.*
3. **PHILANTHROPY**—*Develop awareness, trust, and financial support from the public; and increase engagement and financial support from AAN members.*
4. **THRIVING PARTNERSHIP**—*Align leadership and create a thriving partnership with the AAN.*

STRATEGIC PLAN – MEASURABLE OBJECTIVES

OBJECTIVES

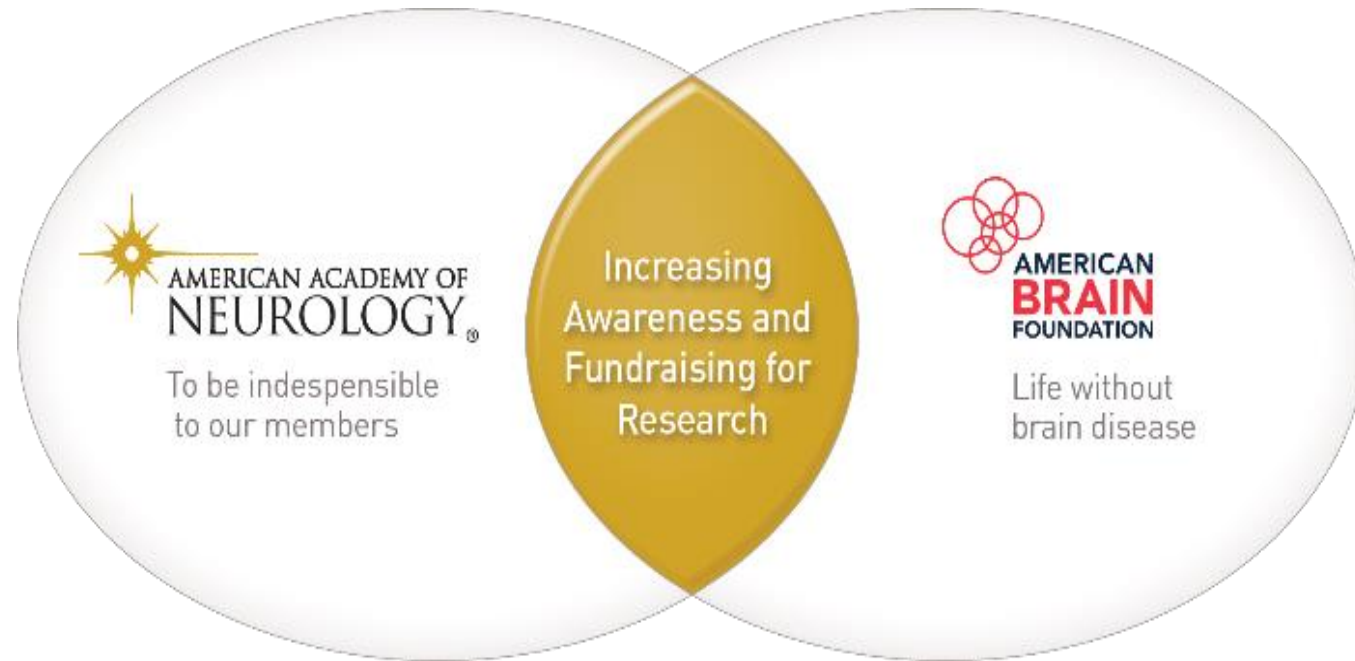
- Each pillar of the strategic plan has a set of objectives
- Tactics are updated and aligned with objectives annually

METRICS

- The Board measures progress with a scorecard similar to AAN's

Strategic Goal #1	Philanthropy: Develop full-fledged public support and deepen giving from AAN members			
Outcomes	FY 2018	Threshold	Target	Max.
1. Total funds raised (without AANI Grant)	\$4,499,940*	\$3,400,000	\$3,502,000	\$3,570,000
a. Operational Goal (Financial Organizational Health)	\$1,506,435	\$1,525,741	\$1,571,513	\$1,602,028
b. Amount raised in crowdfunding	\$128,343	\$110,000	\$120,000	\$130,000
c. Amount raised for traditional research/other research awards (for current and future years)	\$2,531,833	\$1,975,109	\$2,034,362	\$2,073,864
2. Major donor pipeline value (Individuals / organizations)				
a. Number of major donors solicited	a. 127	a. 63	a. 65	a. 67
b. Gift amount asked	b. \$8,635,250	b. \$5,958,500	b. \$6,137,255	b. \$6,256,425
3. Number of new donors	959	926	990	1188
4. Number of crowdfunding/website donors	336	317	326	333
5. Number of donors	2,638	2,295	2,363	2,409
Strategic Goal #2	Research & Crowdfunding: Construct a virtual platform to match the best science with the largest pool of committed donors to advance a continuum of research.			
Outcomes	FY 2018	Threshold	Target	Max.
#2, A: Crowdfunding				
1. Number of new peer-reviewed proposals approved for posting on the crowdfunding platform	9	10	20	40
#2, B: Grant making				
1. Money granted for CRTS/CSDA's	\$1,501,664	\$1,530,109	\$1,530,109	\$1,530,109
2. Money granted through crowdfunding	\$113,220	\$100,000	\$110,000	\$120,000
3. Total Scientific and Other Awards**	\$194,389	\$179,802	\$185,196	\$188,792
4. Total money granted to defeat brain disease	\$1,809,273	\$1,809,911	\$1,825,305	\$1,838,901

PARTNERSHIP WITH THE AAN



The basis of our partnership is our shared desire to increase awareness and fundraising for research.

PARTNERSHIP WITH THE AAN

In addition to operating support, AAN supports ABF through:

- **Extensive use of AAN logo and brand**
 - No other charity is able to feature AAN logo/brand at such a level
- **Access to AAN patient education content**
- **Free advertising and editorial space each year** (value of \$339K+)
 - *Brain & Life*[®] (6x)
 - *AANnews*[®] (12x)
 - *AANenews*[®] (24x)
 - AAN.com (featured charity)
 - BrainandLife.org (featured charity/logo on 300+ pages)

PARTNERSHIP WITH THE AAN

Support also includes:

- **AAN management of Clinical Research Training Scholars program**
 - ABF includes \$5,000 admin fee in each grant to cover AAN expenses
- **Access to AAN science experts to review research projects**
- **Free direct outreach to:**
 - AAN members (up to 3x per year)
 - Brain & Life subscribers (up to 3x per year)
- **ABF donation request included in AAN membership renewal campaign**
 - 20+ requests for donations via email and mailings per year
 - Forecast to raise \$135K in 2019

PARTNERSHIP WITH THE AAN

Support also includes:

- **AAN is the largest sponsor of Commitment to Cures event (\$35,000)**
- **Exposure at AAN Annual Meeting**
 - Prime/featured booth location
 - Free/featured advertising in publications
 - Free/featured advertising on-site at event
- **Free/featured booth space at:**
 - Brain Health Fair
 - Bike Helmet Giveaway
 - Fall Conference
- **Access to AAN staff for donation campaigns**

PARTNERSHIP WITH THE AAN

We operate under joint agreements:

- 1. Principles of Joint Collaboration**

Adopted by AAN and ABF Boards, Sept., 2016

- 2. Management Services Agreement**

Signed by AAN and ABF management, Jan., 2017

See Tab 3 of
handout.

NATIONAL RESEARCH FUNDING PARTNERS

The ALS Association
Alzheimer's Association
American Epilepsy Society
American Heart Association
Consortium of MS Centers
CReATe Consortium
Epilepsy Foundation
International Headache Society
The Mary E. Groff Charitable Trust

Parkinson's Foundation
Society of Vascular and Interventional
Neurology
Tourette Association of America
The William Randolph Hearst Foundation
McKnight Brain Research Foundation
Muscle Study Group
National Multiple Sclerosis Society

THE PAST – PRIOR TO 2015

PRIOR TO 2015

- Founded in 1992 as American Academy of Neurology Research and Education Foundation
- Managed by the AAN until June 1, 2015
- Funds were raised primarily from industry, AAN members, and AAN for both operations and research
- The majority of Board members were neurologists

TURNING POINT

Increase funds for research by expanding donor pool to include the public

AAN/ABF DECISIONS

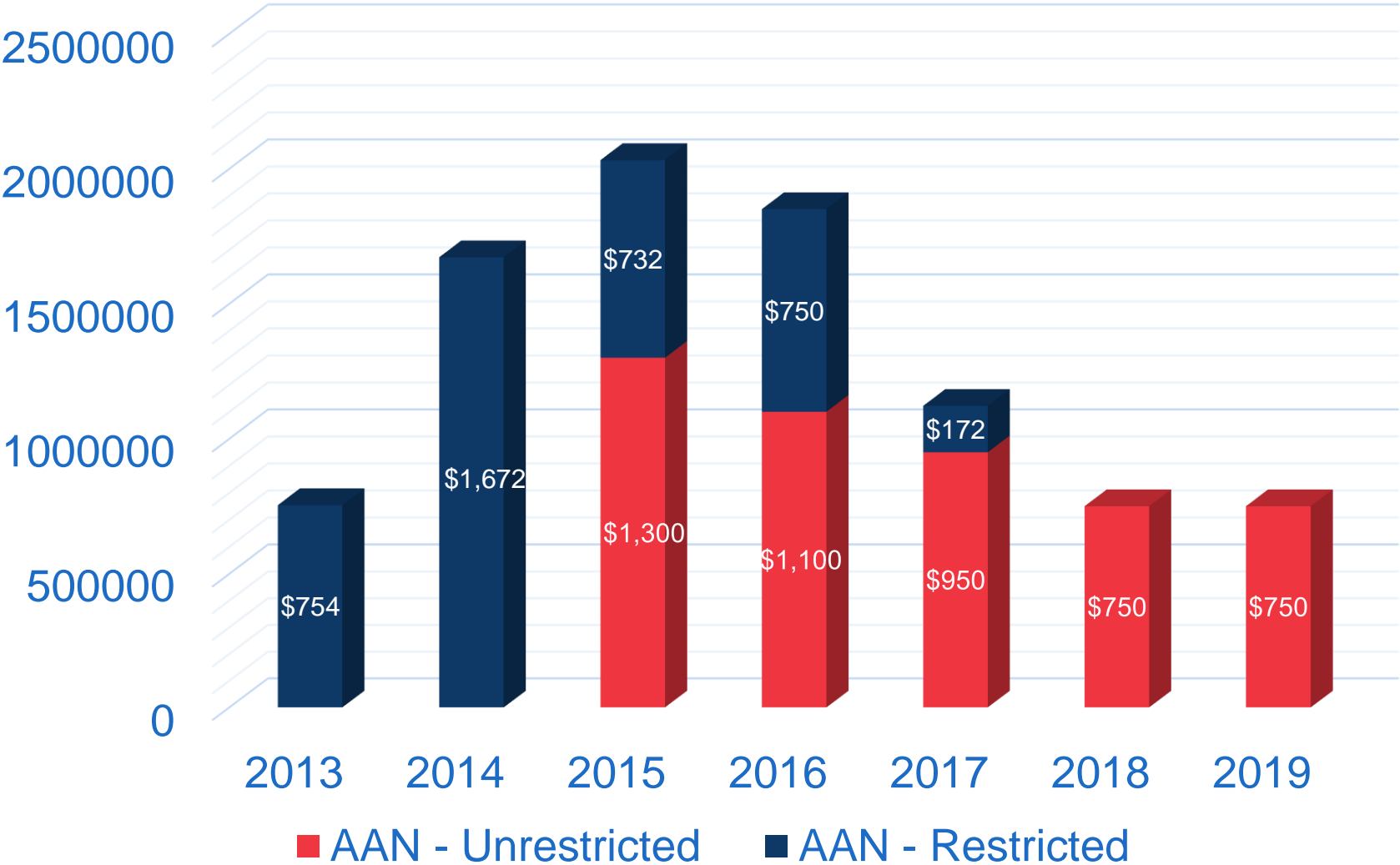
- Rebrand as American Brain Foundation (ABF) – 2012
- Transfer Industry Roundtable and industry funding from ABF to AANI – 2014
- Run ABF as an independent entity to raise research dollars, with 5 years of declining AAN operating support – 2015
- Establish performance metrics recommended by outside consultant – 2015
- Hire independent executive director – June 1, 2015
- Elect first non-neurologist Board Chair – August 1, 2015

RATIONALE

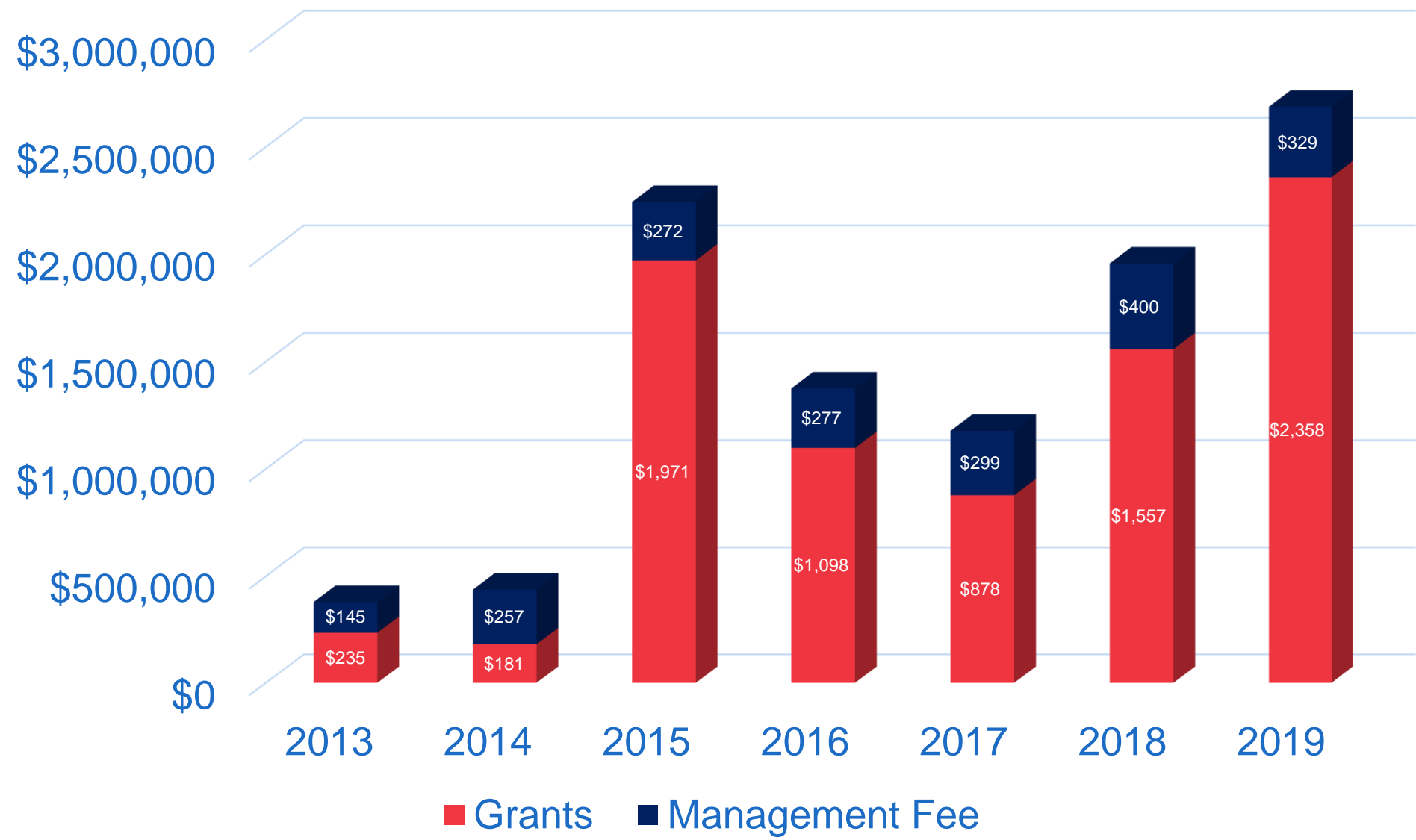
- **Great potential for public contributions**
- **As an independent foundation ABF has potential to:**
 - Position itself as a true public charity
 - Recruit influential non-neurologists to its board to enhance public recognition and fundraising
- **As professional association, AAN has a challenge to:**
 - Attract significant public donations
 - Recruit non-neurologists of influence to its board

PRESENT: 2015-2019

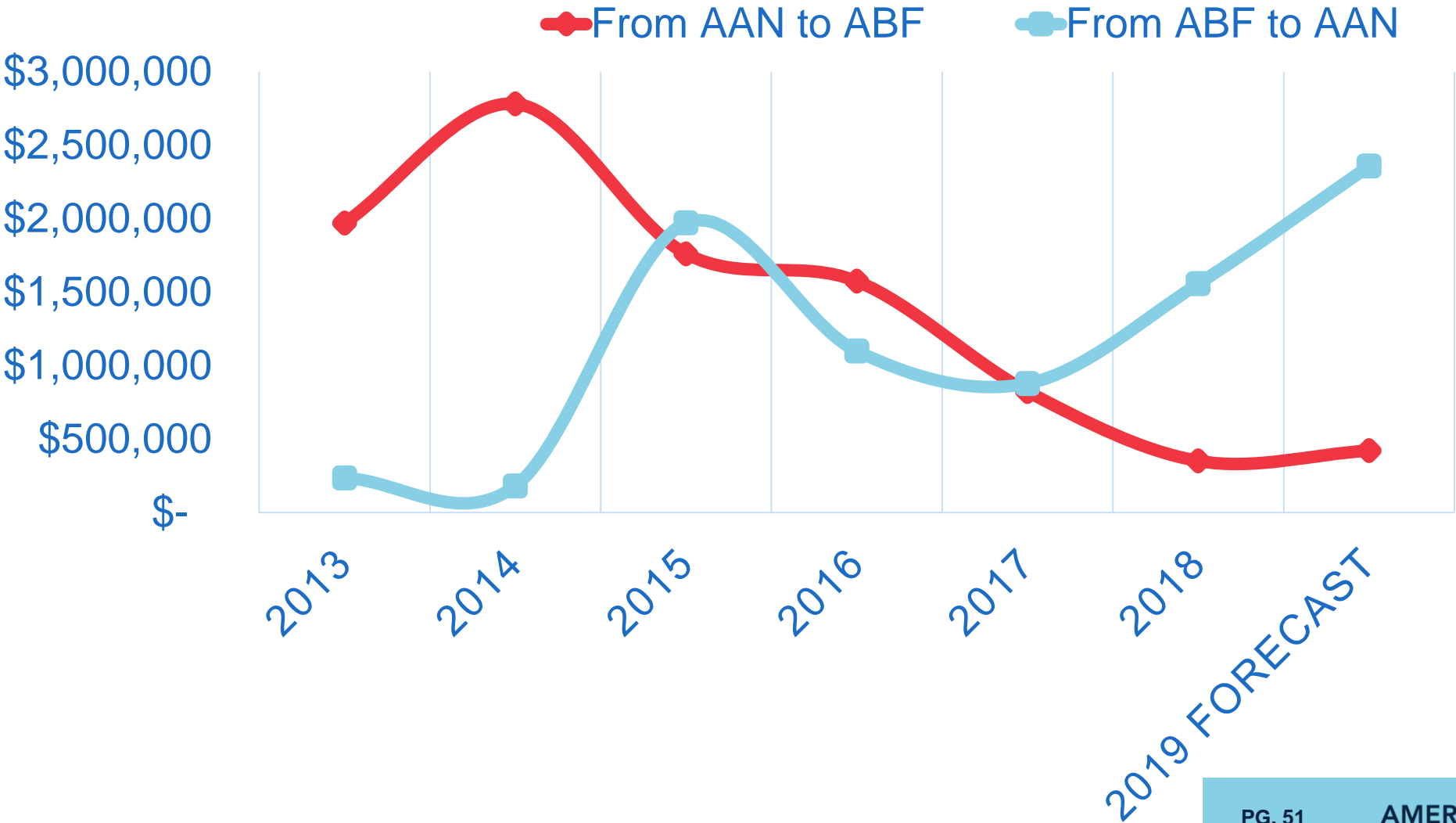
FUNDING FLOWS – FROM AAN TO ABF BEFORE & AFTER 2015



FUNDING FLOWS – FROM ABF TO AAN BEFORE & AFTER 2015

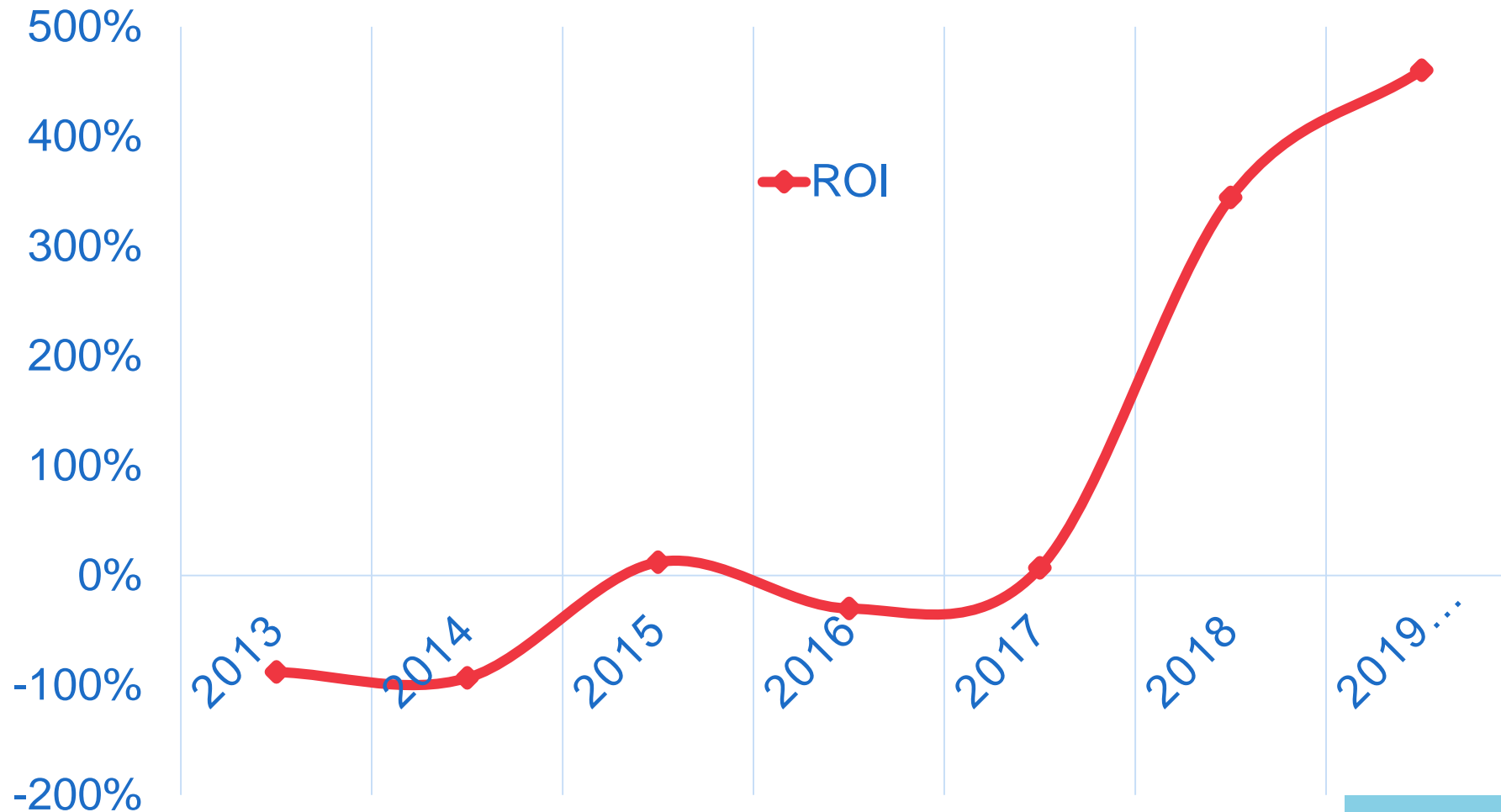


RESULTS TO DATE – FUNDS FLOW BETWEEN AAN & ABF



RESULTS TO DATE – AAN'S RETURN ON INVESTMENT

FROM -88% TO +460% IN 5 YEARS



Return on AAN's additional investment in ABF, netting out ABF management fee to AAN.

RESULTS TO DATE – AAN’s ROI

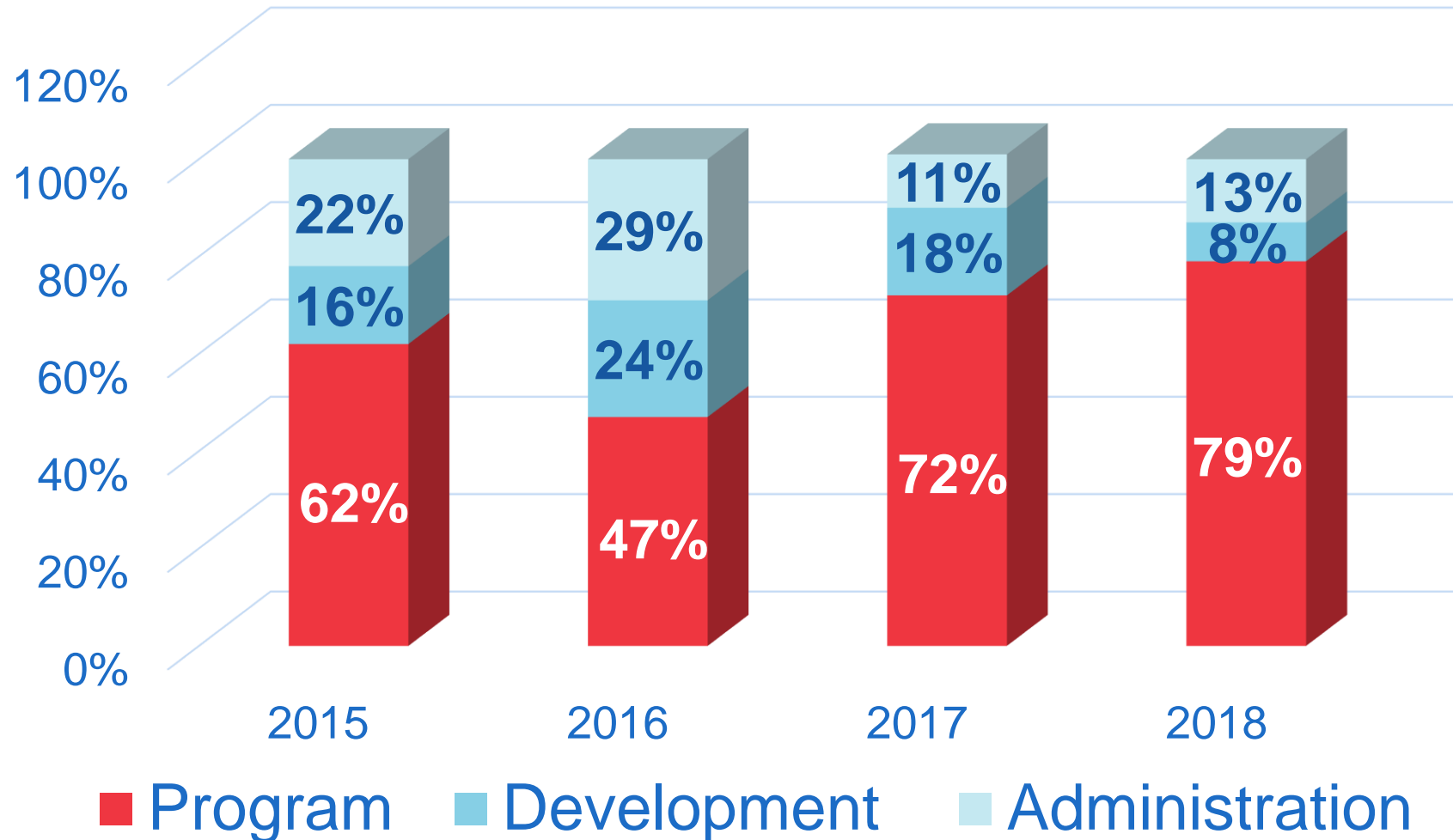
AAN Return on ABF Investment

	<u>2016</u>	<u>2017</u>	<u>2018</u>	Forecast <u>2019</u>
Total Grant ROI				
AAN Net Support*	\$ 1,573,103	\$ 822,400	\$ 350,440	\$ 420,853
ABF Total Grants to AAN	1,098,000	877,800	1,557,389	2,358,000
Net Gain (loss) to AAN	(475,103)	55,400	1,206,949	1,937,147
ROI	-30.20%	6.74%	344.41%	460.29%

See Tab 5 of Handout.

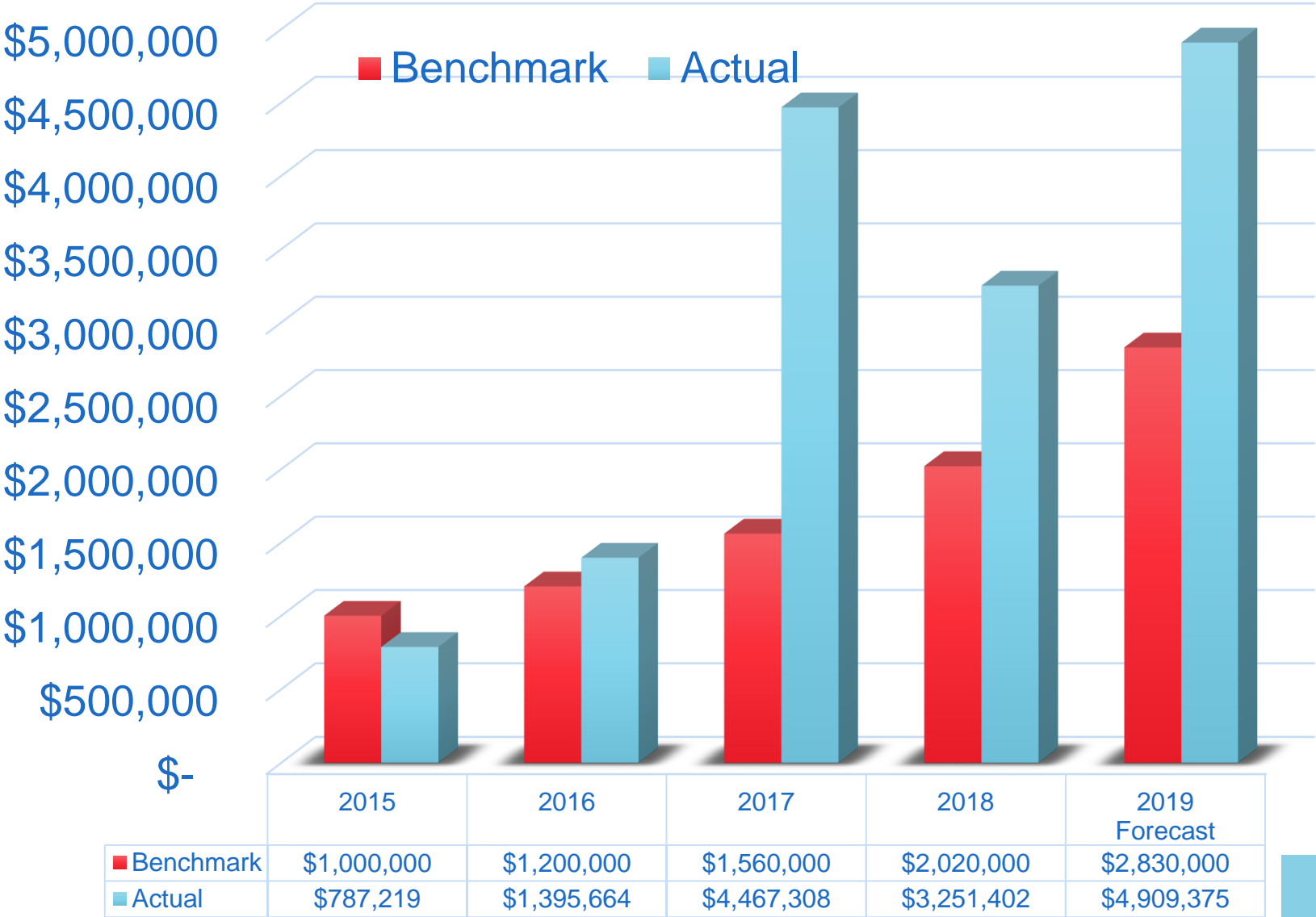
* AAN Grants with ABF Management Fees netted out

RESULTS TO DATE – FUNCTIONAL EXPENSE RATIO



In 2018, ABF exceeded nonprofit industry standard of 75% program expense.

ABF PERFORMANCE – AAN-ASSIGNED FUNDRAISING BENCHMARKS



AAN grants to ABF are NOT included in the fundraising totals shown.

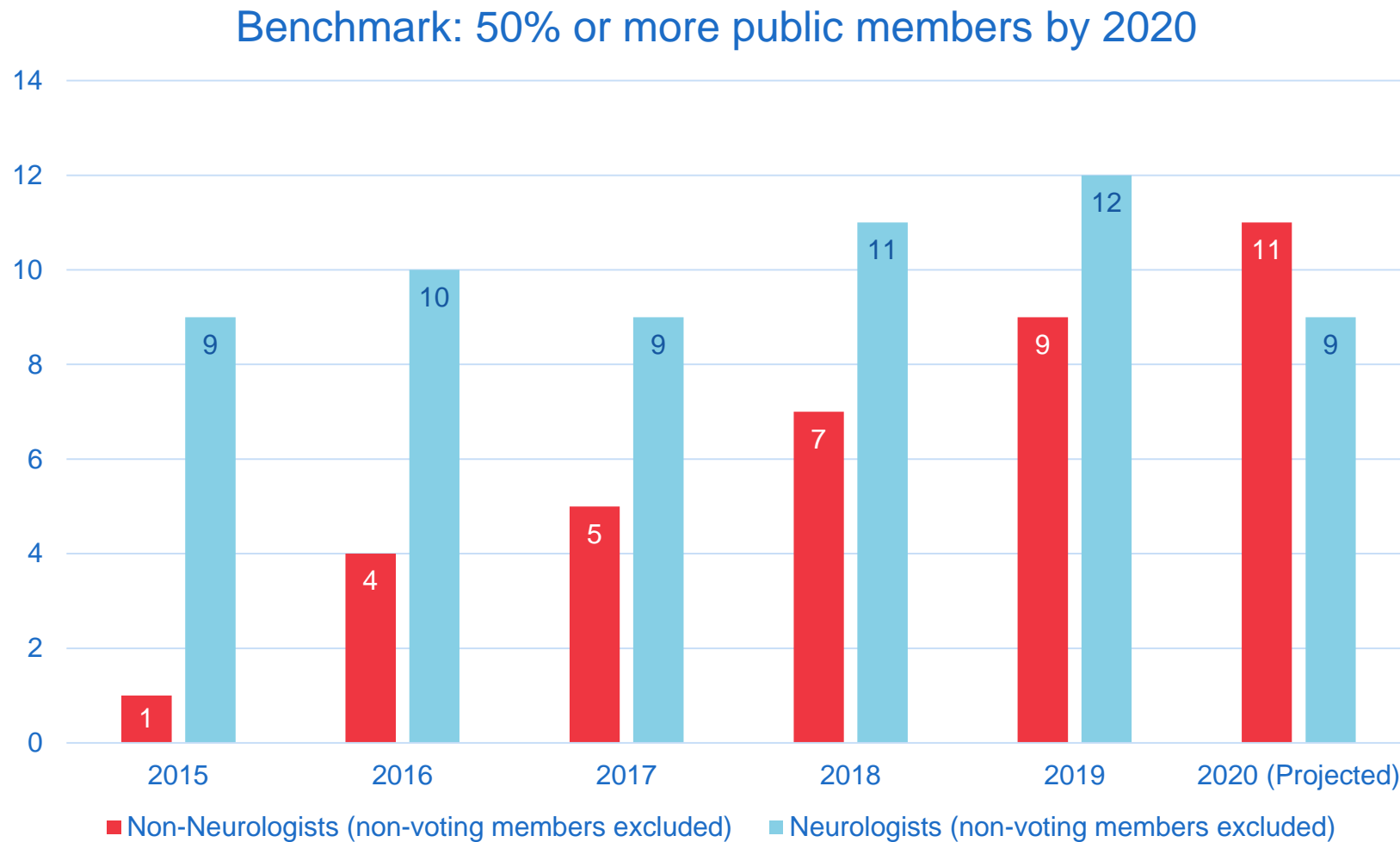
RESULTS TO DATE – \$4.27 FUNDS RAISED FOR 2019 AND BEYOND

\$1,320,000	Cognitive Aging
776,000	General Research
546,000	ALS
352,000	Parkinson's
257,000	Lewy Body Dementia
225,000	MS
162,000	Headache
160,000	Interventional Neurology
134,000	Alzheimer's
102,000	Epilepsy
100,000	Tourette's
100,000	Neuromuscular Disease

VALUE ADDED – RESEARCH

- Of ABF's \$7M in grant expense from 2015-present, 94% supported AAN's research program.
- ABF has increased the number of funding partnerships for AAN research program by 40% since 2015.

ABF PERFORMANCE – AAN-ASSIGNED GOVERNANCE BENCHMARKS



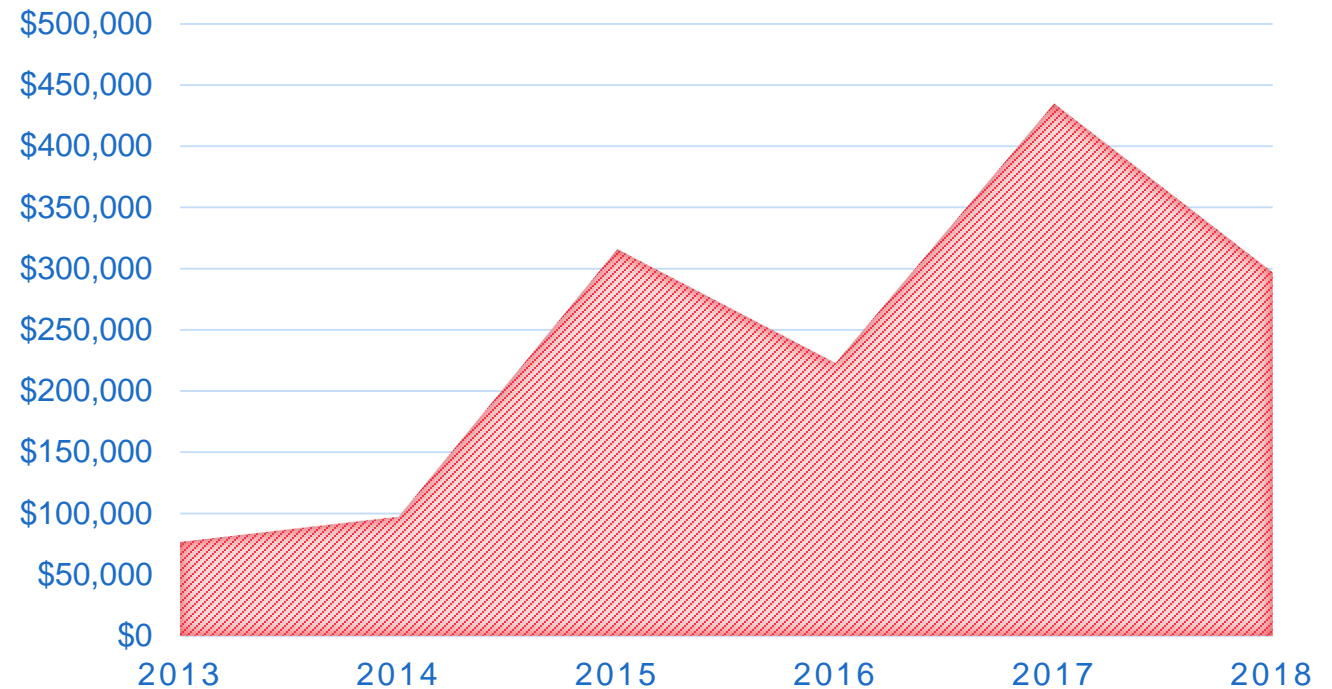
Ex-Officio, Non-Voting members excluded

VALUE ADDED – PUBLIC ENGAGEMENT

Value of neurology highlighted by public Board members and ABF awardees:

- Neurology on the Hill
- *Neurology* editorials
- Congressional testimony
- Stories in AAN publications
- Private events
- Public speaking
- Philanthropy and estate planning

DONATIONS FROM INDIVIDUALS (NON-AAN MEMBERS)



SIGNIFICANT WINS

Endowed Funds Raised for AAN Research Program

- **\$375,000** for Raymond Adams Endowment for CRTS research
- **\$100,000** for new Joseph B. Green Endowment for CRTS research

Commitment to Cures

- From **\$55,663** raised in 2015 to **\$300,761** raised in 2019

Lewy Body Dementia Research Award

- Michael J. Fox Foundation \$1.5 M matching grant
- Mary Groff Charitable Trust \$250,000

\$945,000 Bequest

\$1.65 M for 10 new CRTS's in Cognitive Aging

Crowdfunding

- **\$120,000** raised and granted to three projects

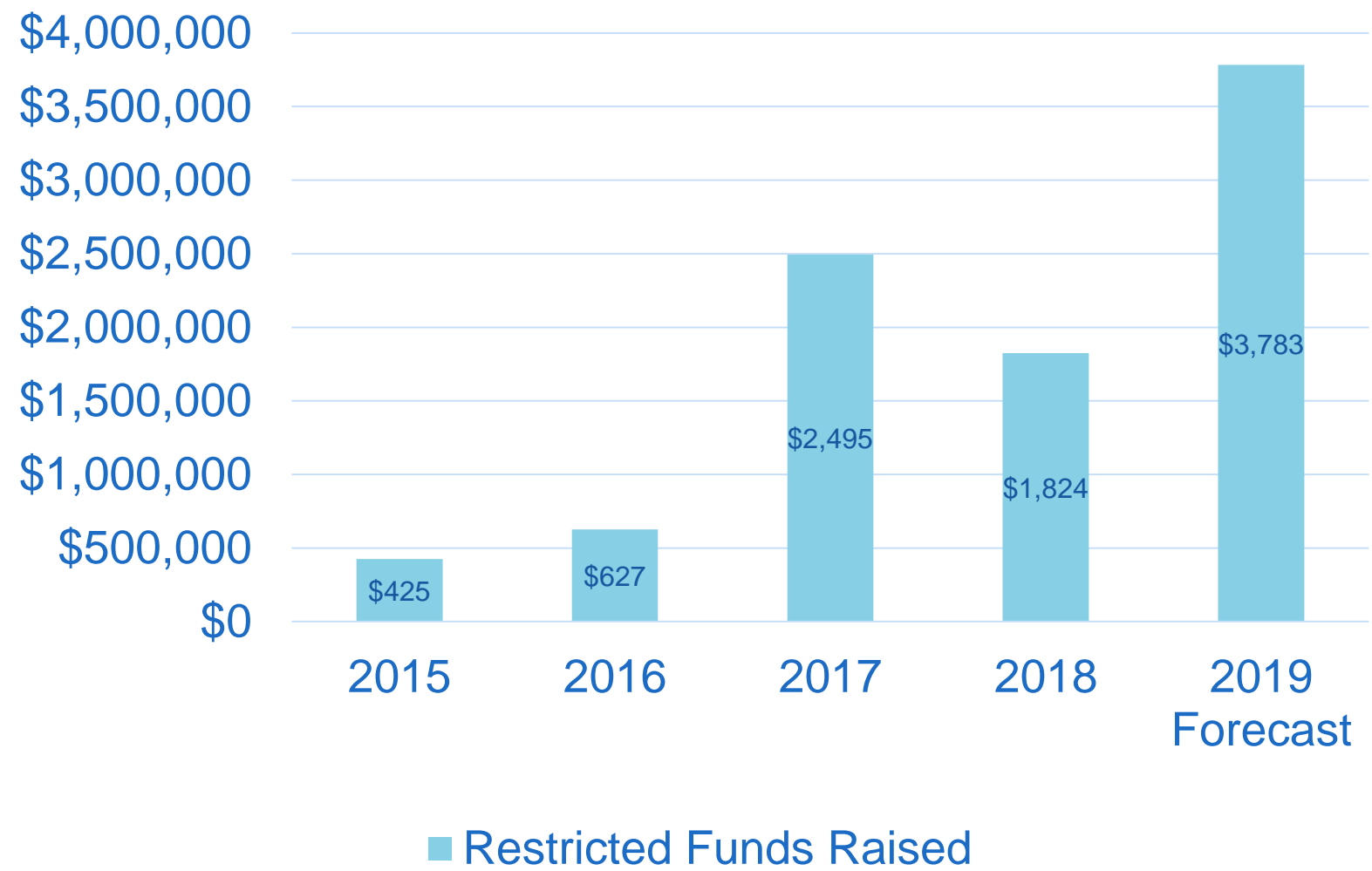
DESIRED FUTURE

WHERE ARE WE GOING?

We have only just begun. We have two major business planning imperatives for our next phase.

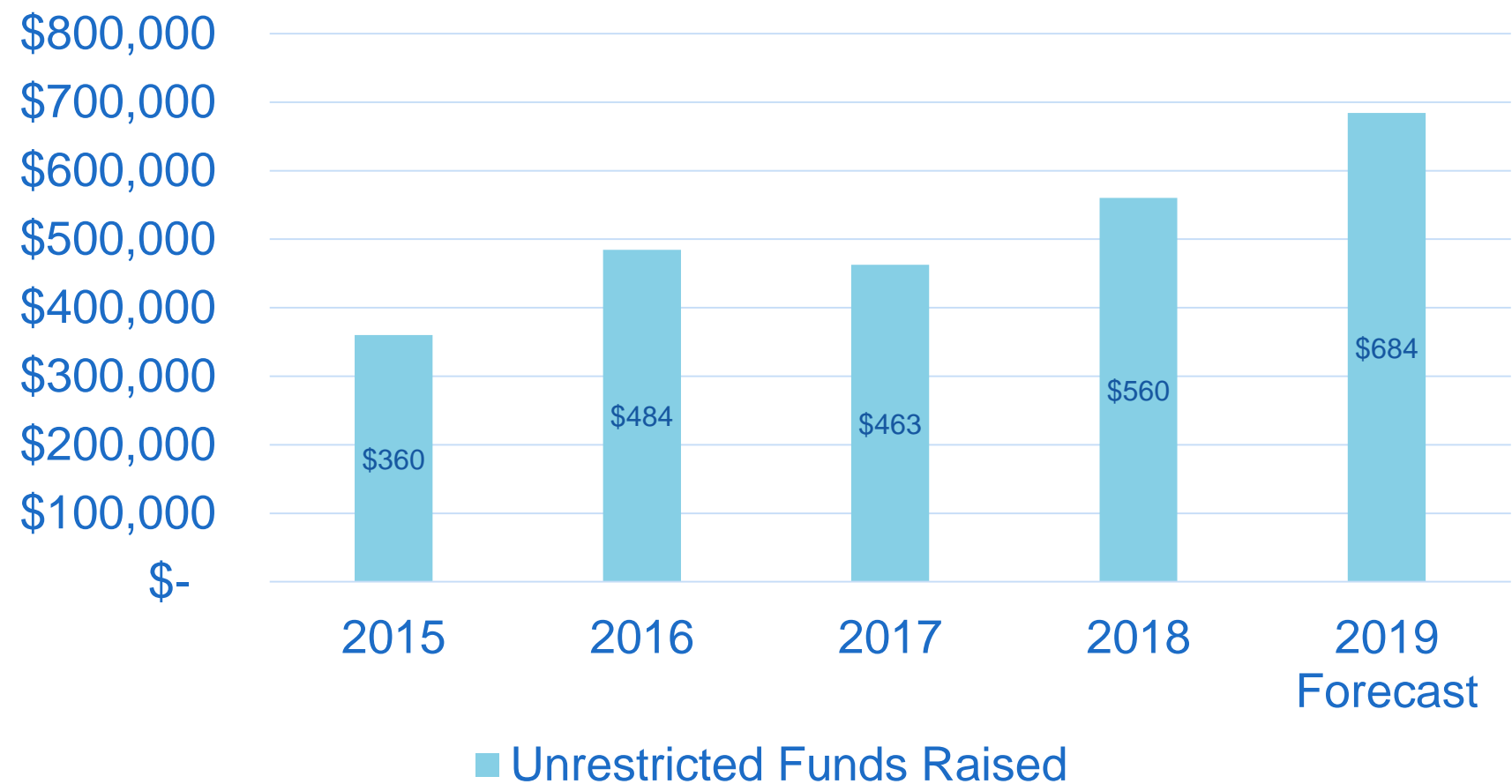
1. Raising awareness of the American Brain Foundation and our research mission
2. Aggressive fundraising growth in the public sector

ABF PERFORMANCE – Restricted Fundraising



AAN grants to ABF are NOT included in the fundraising totals shown

ABF PERFORMANCE – Unrestricted Fundraising



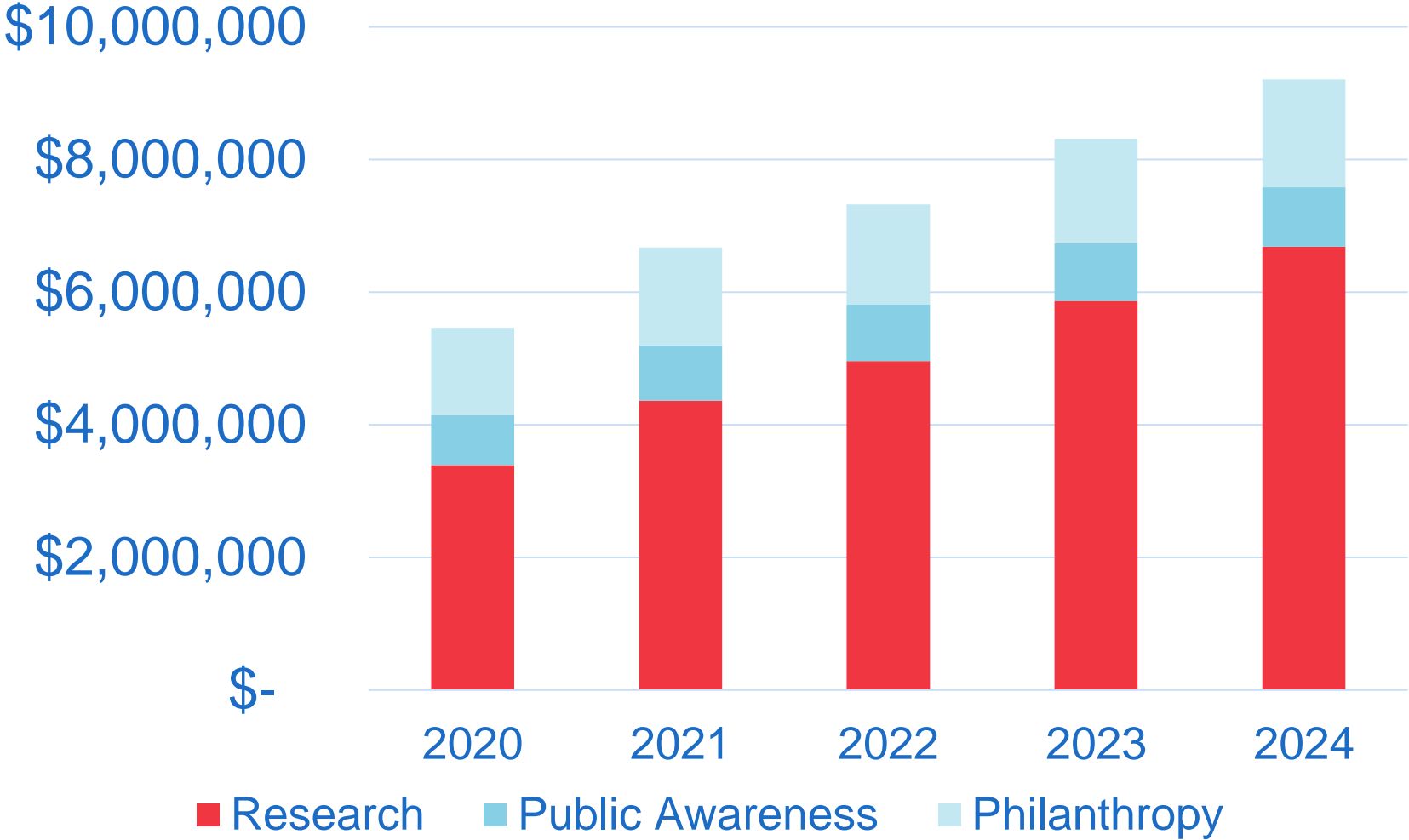
AAN grants to ABF are NOT included in the fundraising totals shown.

HOW WE WILL GET THERE – CONTINUING PARTNERSHIP

The flow of funding from ABF to AAN for research is dependent upon the flow of funds for operations from the AAN to the ABF. We will continue:

- **Donor-Centric:** Allowing donors to provide restricted gifts for research
- **10% Charge:** Charging a 10% program fee on most restricted gifts
- **Growing ROI:** To see funds flowing from ABF to AAN (for payment of shared services and research grants) outgrowing funds flowing from AAN to ABF for operations

HOW WILL WE GET THERE - FIVE-YEAR SCALE-UP PLAN



Refer to
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HOW WILL WE GET THERE - FIVE-YEAR SCALE-UP PLAN

Scaled-up investments:

Public Awareness

- Advertising
- Brand Awareness campaigns
- Digital platforms

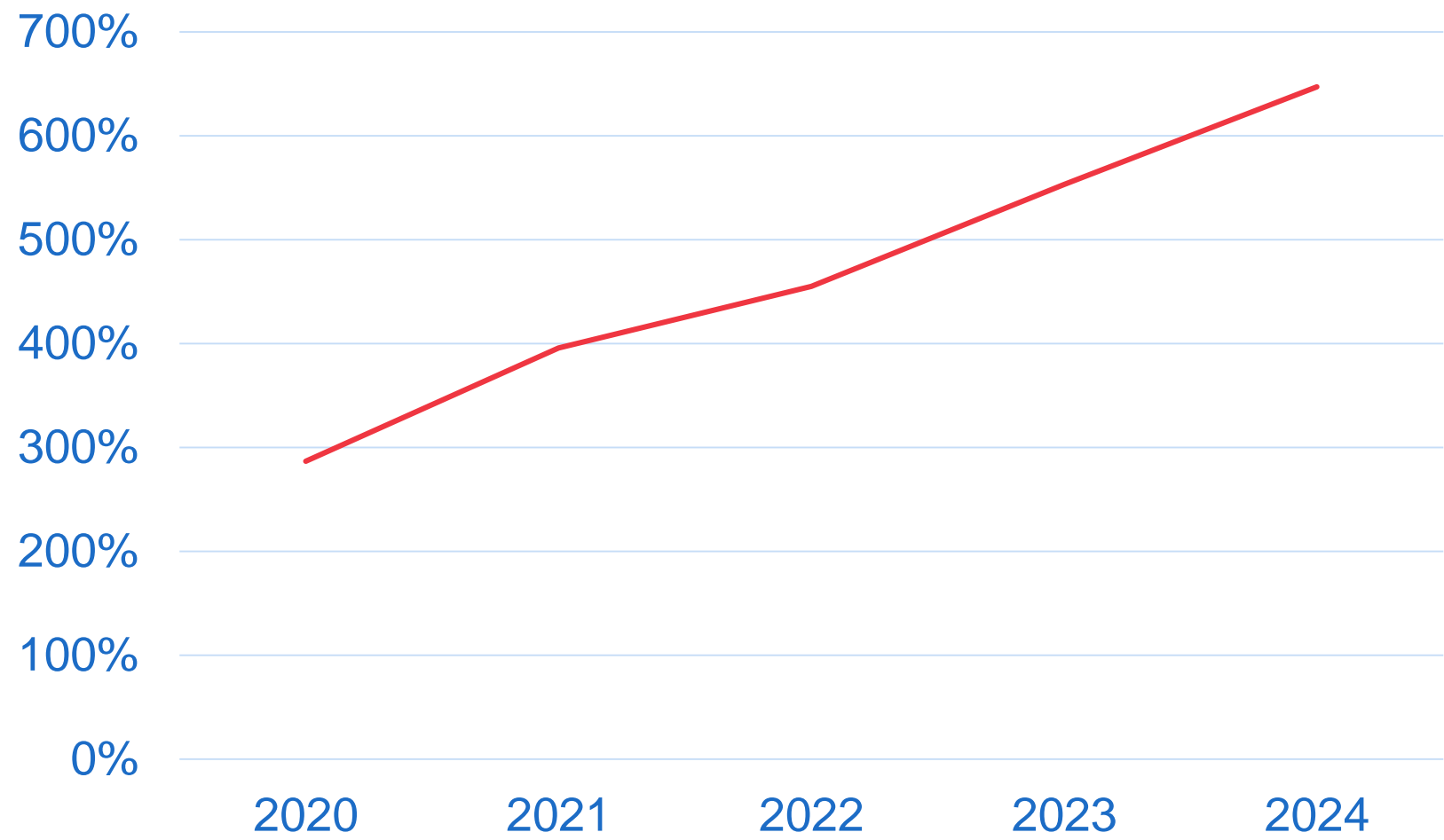
Philanthropy

- Donor acquisition
- Database
- Direct mail
- Gift processing
- Major/Planned gift programs

Research

- Partnership development
- Crowdfunding strategy/management
- Project development

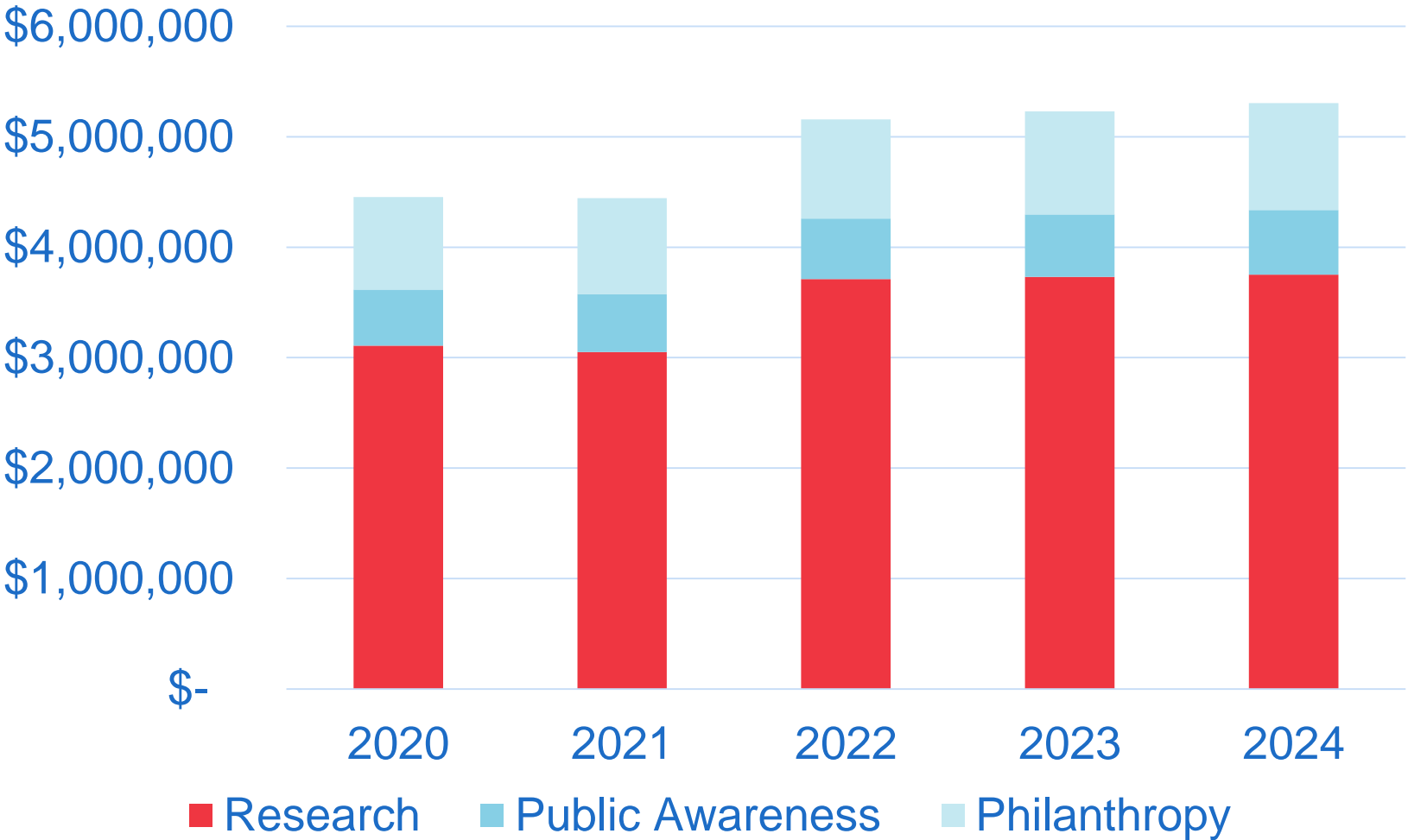
ROI – \$1.5M ANNUALLY FOR FIVE-YEAR SCALE-UP PLAN



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ALTERNATIVE FUTURE

HOW WILL WE GET THERE - FIVE-YEAR CONSERVATIVE PLAN



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HOW WILL WE GET THERE - FIVE-YEAR CONSERVATIVE PLAN

Flat or incremental investments in:

Public Awareness

- Advertising
- Brand Awareness campaigns
- Digital platforms

Philanthropy

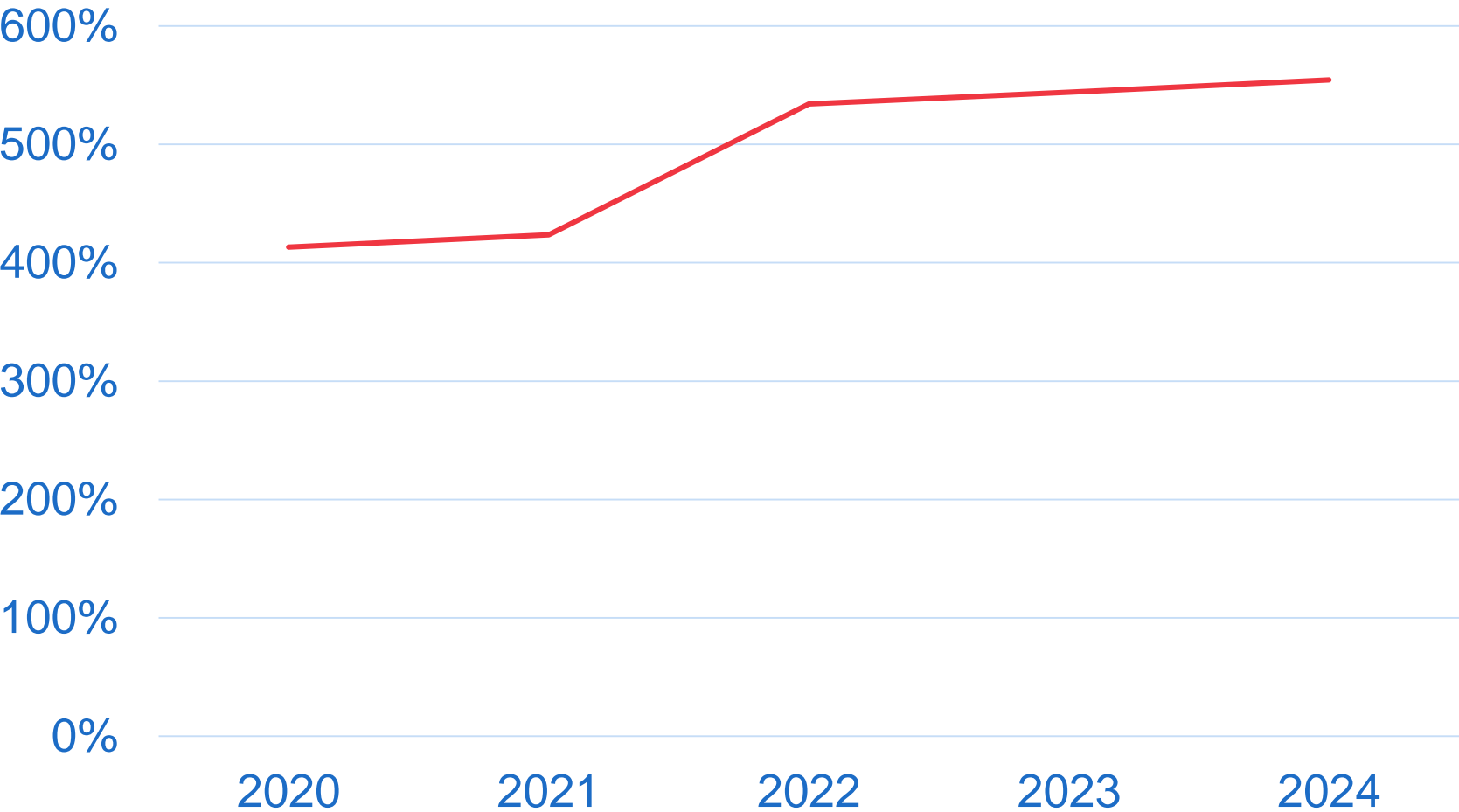
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Research

- Partnership development
- Crowdfunding strategy/management
- Project development

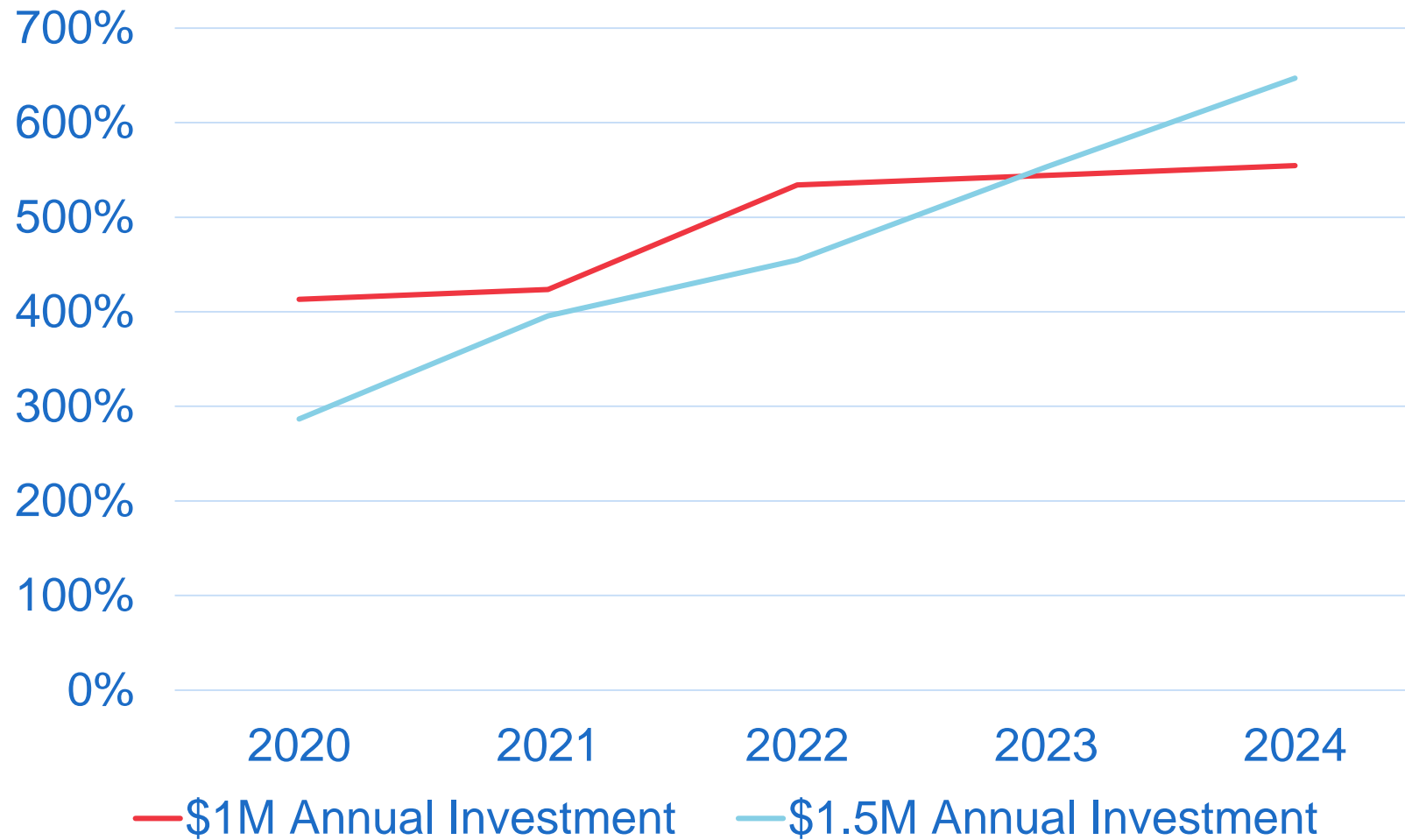
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ROI - \$1M ANNUALLY FOR FIVE-YEAR CONSERVATIVE PLAN



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ROI - COMPARING SCALE-UP v. CONSERVATIVE PLANS



YOUR INPUT – FOR DISCUSSION BY ABF BOARD

1. **AAN/ABF Partnership Vision:** What is the purpose of the partnership and what should it look like in the future?
2. **Future Funding:** What should the future funding flows between the two organizations look like? What will it take for the Academy to feel comfortable with providing operational support to the Foundation?
3. **Metrics:** In the future how will we know we're going in the right direction? How should success or progress be defined for the AAN/ABF relationship?
4. **Big, Hairy, Audacious Goal:** If the ABF is enormously successful and raises a large amount of money, what would the AAN ideally like to see accomplished that cannot be done now at the current funding level?

AAN-ABF Strategic Discussion

1. Partnership Vision: What are the purposes of the partnership between AAN and ABF, and what are the key elements of that partnership or relationship for the future?
2. Future Funding: In the context of the identified partnership vision, what future funding flows should exist between AAN and ABF? What conditions must exist for the AAN to be comfortable providing operational support to ABF?
3. Measuring Success: What metrics could be used to measure progress or success in accomplishing the identified partnership vision?
4. Audacious Goal: If the ABF is enormously successful in raising donations, what would AAN like to see accomplished that cannot be accomplished at current funding levels?

Mission Advancement Update

Marie Tuhy, Director, Mission Advancement

Lisa Dahlberg, Major Gifts Officer

Agenda Slide

- Full team
- Revenue goals for 2019 Q3/Q4
- Web Site
- Social Media
- Annual Fund
- Major Giving

Staff

Fundraising, Program and Administration -



Jane Ransom
Executive Director
Full Time



Lisa Dahlberg
Major Gifts Officer
Full Time



Suzi Johnson
Program Officer
Research & Digital Grants
Full Time



Marie Tuhy
Director of Mission Advancement
Annual Fund, Mid-level Donors, Team Management
Full Time

Marketing and Administration -



Natalie Baumgartner
Executive Coordinator
Full Time



Liam Moore
Advancement Associate
Project Management
Full Time



Mark Tundel
Marketing & Communications
Associate
Three-quarter Time



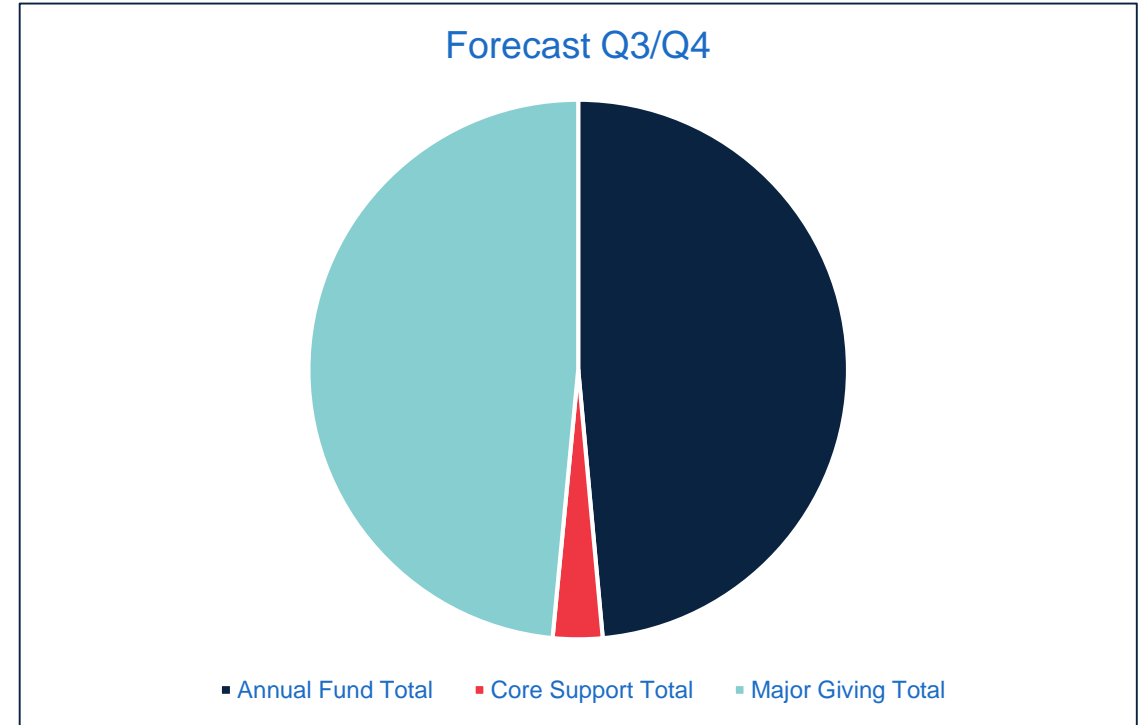
Sharla Donohue
Database Administrator
Data & Research
Half Time



Andrea Nargan
Data and Research Specialist
Three-quarter Time

Revenue Goals 2019 Q3/Q4

Forecast Q3/Q4	Sub-Area	Area
\$20,000	Unsolicited / Web	Annual Fund
\$25,000	Honoraria	Annual Fund
\$102,000	Dues Check Off	Annual Fund
\$43,333	Appeals	Annual Fund
\$30,000	Employee Giving	Annual Fund
\$12,000	Unsolicited Tribute	Annual Fund
\$8,000	Monthly Donors	Annual Fund
\$5,000	Other(TDB) - Fall Conference	Annual Fund
\$15,000	Core Support	Core Support
\$70,000	Personal Asks	Major Giving
\$125,000	Rowland Circle	Major Giving
\$50,000	Salons	Major Giving
\$505,333	TOTAL	



Web Site Refresh



[Our Purpose ▼](#)

[Understanding Brain Disease ▼](#)

[How To Help ▼](#)

[For Researchers ▼](#)

[Donate Now](#)

Imagine Life Without Brain Disease.

We bring the public and researchers together to cure brain diseases and disorders. Lorem ipsum dolar imet lorem ipsum dolar imet.

[Learn More](#)



Web Site Goals



01

Better user experience: Easier/cleaner navigation



02

Stronger engagement via messaging/imagery



03

Increased conversion rate: donations/email sign-ups

Social Media

Social Media Strategy

- Relevant
- Targeted
- Promoted
- Sophisticated tracking/pixels



Your Influencer Power

DON'T FORGET TO:

- ✓ **FOLLOW**
- ✓ **LIKE**
- ✓ **SHARE**



Annual Fund

JOIN ^{THE} SQUAD



Brain Squad – June

Multichannel Campaign

- Ads – *Brain & Life* | AANews
- Targeted Direct Mail driven by Target Analytics
- Targeted Facebook campaign
- Social media content
- Welcome series email acquisition/upgrades

Goals

- High donor retention rates
- Long term donor engagement
- High value donor pipeline prospects: major gifts/planned gifts



JOIN THE SQUAD AT AmericanBrainFoundation.org/BrainSquad

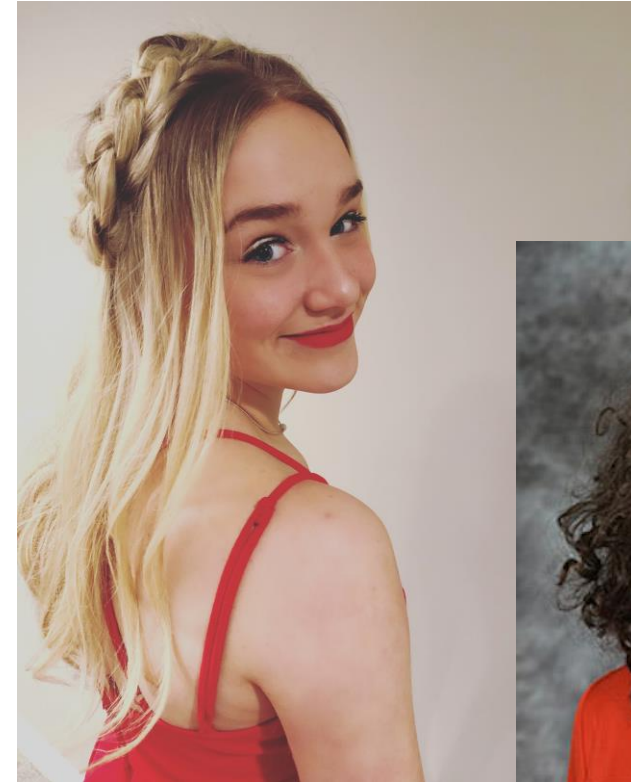
CRTS Campaign – July/August

Meet Zoe Koep

- Dancer
- High School Sophomore
- Life with Tourette's: *I had to figure out at a young age how my emotions affect my tics, from good to awful ways. It has been frustrating to figure out on my own and learn to deal with. This was the first moment in my life where my parents couldn't fix something for me.*

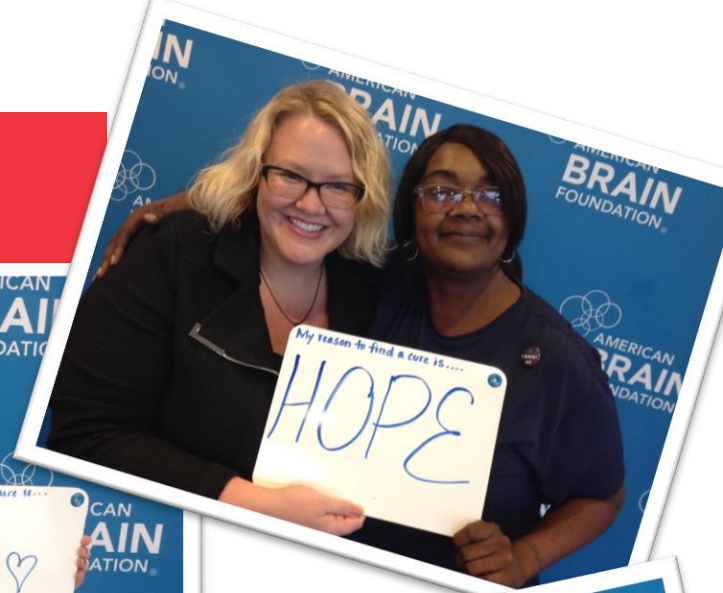
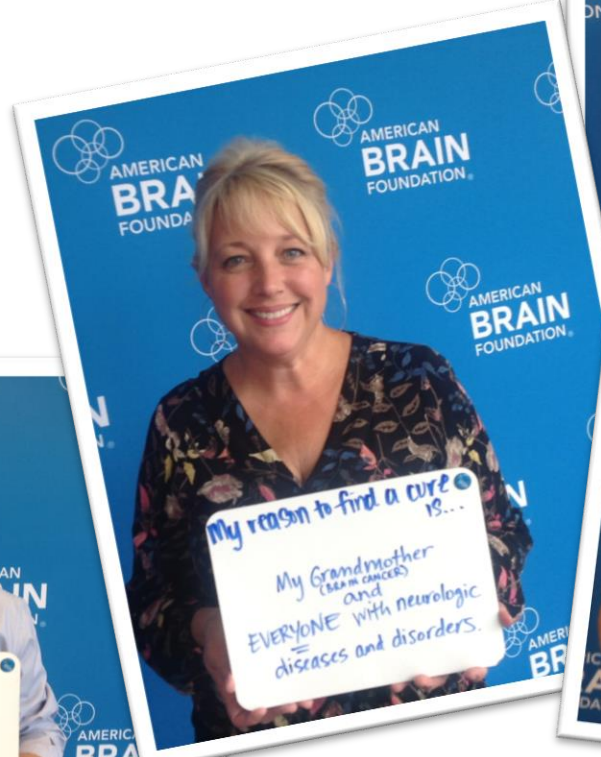
Meet Jennifer Vermilion, MD

- Award: Clinical Research Training Scholarship in Tourette Syndrome
- Institution: University of Rochester, Child Neurology Department
- Project Title: Anxiety phenotypes and functional impact in youth with chronic tic disorders
- How her work will help youth like Zoe: *The goal of this research is to compare anxiety symptoms in youth with and without tic disorders and determine which symptoms predict disability in both groups. These are important initial questions to address prior to developing therapies that can specifically address how to treat anxiety in youth with tic disorders.*



Employee Giving Campaign – September

- September 2019
- Joy of Giving – Pride in Partnership
- Lunch and Learn Events
- Brain Squad
- Staff fueled prize event



Year End Campaign– Q4

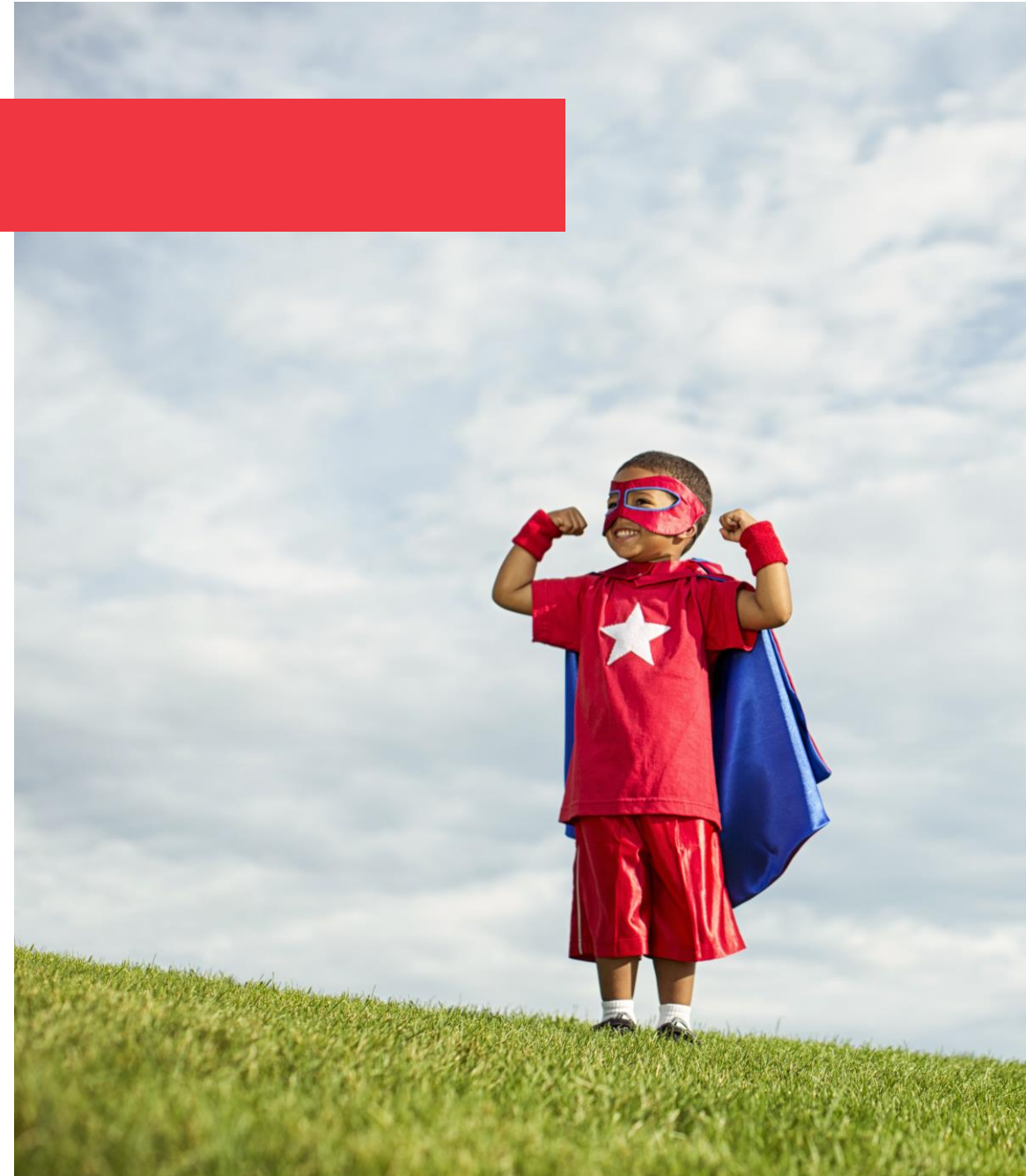
Who is your hero in the fight against brain disease?

Throughout the year end campaign, we'll be asking people to think about their heroes in this battle. Their doctors? Caretakers? Courageous patients?

In the season of gratitude, what a better way to honor those heroes than to give a tribute gift to defeat brain disease.

Campaign kickoff starts in October and runs through December:

- Ads in *Brain & Life* and *AANews*
- Sophisticated and targeted digital/social strategy
- Direct mail



Major Giving – 2019 strategy

Major gifts - \$245K in 2019

Objective: build a strategic major gifts program with dedicated processes for identifying, qualifying, cultivating, soliciting, and stewarding donors.

Here's how we'll meet our 2019 goals:



01

Pipeline



02

Rowland Circle



03

In-person asks



04

Donor salons

Rowland Circle - \$125K goal

- Personal introductions to Lisa
- Leadership giving newsletter to prepare for year-end renewals
- Gift renewal phone calls
- Pipeline to identify additional prospects

In-Person Major Gift Asks: \$70K Goal

Gift Range	No. Gifts required	No. Prospects required	Subtotal	Cumulative total	Cumulative percentage
7,000.00	1	4	7,000.00	7,000.00	10%
5,300.00	1	4	5,300.00	12,300.00	18%
3,500.00	2	8	7,000.00	19,300.00	28%
2,500.00	3	12	7,500.00	26,800.00	38%
2,000.00	3	12	6,000.00	32,800.00	47%
1,600.00	5	20	8,000.00	40,800.00	58%
1,400.00	7	28	9,800.00	50,600.00	72%
1,100.00	7	28	7,700.00	58,300.00	83%
700.00	10	40	7,000.00	65,300.00	93%
Under 700.00	13	53	4,700.00	70,000.00	100%

Salons - \$50K Goal

- Small, intimate special events held by ABF constituents to introduce their networks to ABF
- Upcoming event in Atherton, CA fall 2019
- Possible event in the Hamptons, summer 2019
- Host a salon of your own – get in touch with Lisa!

Governance Update

Kevin Goodno, Chair

Commitment to Cures 2019

David Dodick

Commitment to Cures – Updates & Request

- **Commitment to Cures 2019**

- \$410,761 raised, of which \$149,000 was restricted
 - Up from \$55,000 raised in 2016
 - Excellent feedback on program and venue from guests and honorees
- Key lessons
 - One of the honorees should be a local hero
 - Have a local Host Committee
 - Guests appreciate a unique venue

- **Commitment to Cures 2020**

- Host Committee Chairs: Drs. Anthony Lang and Xavier Montalban
- Working on Awardees



Strategic Planning Initiative

Kevin Goodno, Chair

Adjourn

Kevin Goodno, Chair



AMERICAN
BRAIN
FOUNDATION