

# Development Plan

## **Introduction**

The purpose of this development plan is to outline the work of the Foundation as will be supported by the Foundation Board and executed by Foundation staff. The Foundation Board will approve the development plan annually, and progress will be monitored through board meetings on a monthly basis.

## **Mission – State College of Florida Foundation**

We connect donors' passions and regional partners with State College of Florida's outstanding students, faculty, programs and community, and we steward foundation assets consistent with our donors' intent.

## **Fundraising Goals**

- 1) Strengthen our culture of philanthropy and increase board giving by 11% – Cassandra Holmes. Deadline: 12/18
- 2) Increase fundraising through events by 15% in 2018 – Barb Bourgoïn. Deadline: 12/18
- 3) Increase retention of donors to 50% . Barb Bourgoïn and Cassandra Holmes. Deadline: 12/18
- 4) Generate 25 new donors of capacity. Barb Bourgoïn and Cassandra Holmes. Deadline: 12/18
- 5) Strengthen relationships and giving with 15 new alumni donors. Erica Wuorio. Deadline: 12/18
- 6) Raise \$60,000 in this year's Employee Campaign Barb Bourgoïn. Deadline: 12/18
- 7) Raise \$50,000 from "Parlor Parties." Cassandra Holmes. Deadline: 12/18
- 8) Complete campaign plan to present to the board. Cassandra Holmes, Barb Bourgoïn. Deadline: 3/31

## **Sources of Funding**

*Foundations*

*Individual Donors*

*Annual Gifts*

*Alumni – First time telethon*

*Employee Campaign*

*Foundation 40<sup>th</sup> Anniversary Un-event*

*Giving Challenge*

*Planned Gifts*

*Campaign Gifts*

*Events*

*Avenues to the Future*

*Evening Under the Stars*

*Parlor Parties*

*Scholarship Luncheon*

*Corporate/business underwriters  
Churches, Civic Groups, Women's, Golf Clubs, Retirement Communities  
Investment Income  
Capital Campaign  
Neel Programs  
    *Fall Concert  
    Speaker Series  
    Sundays at Neel*  
Other*

### **Marketing/Communications Plan**

*Case for Support – Campaign, Operating Support, Departmental Specific  
Brochures – Sundays at Neel, Music Programs  
Presentations – Campaign presentations, customized presentations for donors  
Newsletters – Electronic, Inspire Magazine  
Press Releases  
Social Media – Develop social media plan, branding, content goals, success measures  
eBlasts – How often, to whom, content  
Twitter – Define Foundation strategies, authorizes spokespeople  
Telephone Campaign – Alumni ask, Thank you to donors  
Website – Audit and Updates*

### **Key Strategies**

- 1) *Continue to build a culture of philanthropy  
Engage board in fundraising events through committee participation, attendance, sponsorship  
Provide routine development reports at board meetings – define dashboard  
Build volunteer recruitment efforts  
Engage the board in prospect review, particularly for the capital campaign  
Recruit and train willing solicitors from the board and other friends of SCF*
  
- 2) *Continue to build upon fundraising infrastructure  
Develop an annual fundraising plan  
Share the budget through staff meetings to ensure understanding  
Audit Raiser's Edge practices to utilize the system to its fullest potential  
Review acknowledgement letter practices to ensure powerful donor messages  
Do a website audit to enhance fundraising information  
Utilize portable credit card payments at events*
  
- 3) *Increase community awareness of State College of Florida needs  
Develop a comprehensive Case for Support  
Review Foundation newsletters/public communications for enhancement  
Collect Alumni stories to showcase successes on website, newsletters, etc.*



Mar.										
Apr.	Evening Under Stars 4.7	X	X	X	X	X	X	X	X	X
May	Giving Challenge									
Jun.										
Jul.										
Aug.	EUS - Sponsor Letters Mailed									
	EUS - Flier of last year's photos		X							
	Faculty Convocation									
Sep.	Set appt. for holiday photo				X					
Oct.	New Fiscal Year Begins									
	Board Retreat									
	Holiday Photo	X	X	X	X	X	X	X	X	X
Nov.	Scholarship Luncheon									
	Fall Concert -		X							
Dec.	Commencement									
	Prep EUS Invitation		X							

**Fundraising Budget**

*Melissa to submit*

**Alumni**

*Communications*

Facebook Page

Build up Social Media Ambassador program.

GOAL: Add 2-3 more SMAs by January, who post about SCF at least twice a month. (= TOTAL of 4-5 SMAs)

Engage via Social Media during the Giving Challenge.

GOALS: have high levels of engagement on posts. 10+ video shares, 2-3 comments,

Use SCF Facebook pages for events on Facebook. Include Avenues to the Future, the Giving Challenge, and Evening under the Stars. Email the “attend on Facebook” along with the invitations. Incentivize sharing the event with SCF magnets or bumper stickers.

GOALS: Reach 50/250 "attending" on the Avenues to the Future Event page list.

Inspire Magazine

Revenue	\$2,000
Expenses	\$13,000
Net Profit	(\$11,000)

Newsletters – electronic, frequency, audience

Website

*Special Events*

**Alumni Meetings & Special Events**

Have alumni event 3-4 times a year-- events may consist of:

Nursing Reunion (planned for 2018)

PTA (planned for 2018)

Student/Alumni catch up

Baseball Alumni meet up during homecoming

Happy hour/ apps

Career resources event

Young professionals meet up

"Trip to the museum" virtual event in LLC once built, with community

Alumni Fest-- with HCC and SPC at Ray's game (similar to this year's event)

Rays game

<i>Revenue</i>	<i>\$2,000</i>
<i>Expenses</i>	<i>\$10,750</i>
<i>Net Profit</i>	<i>(\$8,750)</i>

*Telethon*

Use SCF Phonathon to reach out to MJC, MCC and SCF alumni, parents and friends

-Starting with Athletics; gathering the following information through student volunteer callers:

-Address, Emails, Cellphones, Current Jobs, their education path after leaving SCF

-Invite them back to campus for events, fundraisers, homecoming etc

-Invite them to support \_\_\_\_\_ program at SCF financially and Volunteer

<i>Revenue</i>	<i>\$10,000</i>
<i>Expenses</i>	<i>\$1,000</i>
<i>Net Profit</i>	<i>\$9,000</i>

**Capital Campaign**

A separate campaign plan exists for capital fundraising efforts. However, campaign donors will be cultivated and solicited to support ongoing campus needs through activities outlined in this development plan.

## **Donors**

<i>Analysis</i>	<i>2016-17</i>	<i>Goal 2018</i>
<i>Individual Donors</i>	<i>28%</i>	<i>32%</i>
<i>Foundation Donors</i>	<i>38%</i>	<i>38%</i>
<i>Business</i>	<i>34%</i>	<i>30%</i>

### **Top Individual Donors**

REDACTED

### **Top Foundation Donors**

REDACTED

### **Top Business/Organization Donors**

REDACTED

## **Donor Database**

Raiser's Edge is the database used to track donor information. The data is managed by Brandon Mand, Constituent Database Manager.

## **Donor Acknowledgement**

An acknowledgement letter is sent out for every donation we receive, except for Sundays at Neel ticket purchases. We have approximately 20 different letters currently in use to ensure someone making an unrestricted donation would not receive the same letter as someone making a scholarship donation. Letters are updated annually.

The President, Dr. Probstfeld, sends out hand written thank you notes weekly to donors who make donations of \$2,500 or larger. Pass through scholarships and event ticket purchases are excluded.

## **Stewardship Plan**

Objectives:

- 1) Acknowledgement – Utilize Foundation notecards , send handwritten thank you note within 24 hours. This is from the development officer or direct point of contact with the donor or prospect.
- 2) Recognition – Annually, send birthday cards, anniversary, holiday and postcards from vacation as appropriate and if information is available. Provide public recognition through any giving clubs developed (legacy, specified level of annual giving, plaques in physical facilities, listings in programs at events, acknowledgement publicly from speakers, newsletters, Facebook posts, donor stories on website or in printed material.
- 3) Information – Share newsletters; press releases; website links; one-on-one meetings with campus leadership, students, faculty, other donors; invitation to tour, invitations to

special events. Send personal notes, call, ask for advice, invite to serve on a task force or committee.

Note: There should be 7 touch points between asks. All activities shall be recorded in Raiser's Edge. Prospect/donor assignments will be made in Raiser's Edge.

### **Employee Campaign**

Each year, SCF conducts an Employee Campaign to engage the campus community in philanthropy. All employees are asked to participate in giving, through payroll deduction or one-time gifts.

For the fiscal year 2017-2018, our goal is to raise \$60,000 through the campaign, and participation is a priority with 60% of employees participating as the desired outcome. The campaign will be condensed this year and giving directed to occur on Giving Tuesday on November 28, 2017. A matching gift has been secured and will match first time donors, up to \$2,400. The marketing focus will be on "U + STEAM (Science, Technology, Engineering, Arts & Math), encouraging employees to select their own field of passion and to support the fund of their choice through a one-time gift, payroll deduction, or even through a planned gift.

### **Events**

#### **Scholarship Luncheon**

##### **Description**

Each year, the Scholarship Coordinator hosts a luncheon, inviting scholarship recipients and guests to celebrate our students and extend appreciation for our donors. In 2017, guests were charged a nominal ticket price to attend the event, \$40, and the event venue was moved to Michael's on East. 150 scholarship recipients are expected to attend. This year's event is projected to sell out. We moved to a more centrally located venue, however, given the size of the crowd, identifying a larger venue to accommodate more guests would be helpful. Possible locations might be the Hyatt, the Ritz Carlton, etc.

##### **Target Audience**

Attendees include scholarship recipients, donors of those scholarships, friends of SCF as well as prospective scholarship donors and faculty.

##### **Committee**

Barbara Najmy, Chair

<b>Past Performance</b>	<b>2017 (goal)</b>	<b>2016</b>
# Attendees	350	240
Revenue	\$17,700	N/A
Expenses	\$12,400	
Proceeds	\$5,300	

##### **Sponsors**

Suncoast Credit Union has been the exclusive sponsor in recent years. We may change that strategy with the 2018 luncheon.

**Table sponsors:** This year's table sponsors include the following:

REDACTED

Avenues to the Future

**Description –**

Casual, fun night showcasing our SCF students, faculty and scholarships

**Target Audience**

Alums, donors, parents, friends of SCF in Sarasota/Manatee Counties

**Committee**

REDACTED

**Past Performance**

	2016	2017	2018 (goal)
Revenue	91,662	142,120	\$154,000
Expenses	51,880	54,520	\$51,310
Profit	39,782	87,600	\$102,690
Attendance	220	300	300+

**Sponsors (2017)**

REDACTED

Evening Under the Stars (EUS)

**Description**

Evening Under the Stars is in its 30<sup>th</sup> year, bringing donors and friends of SCF to our Venice campus for a casual evening or networking, dinner for VIP guests, musical entertainment, with a grand finale fireworks display.

**Target Audience**

We target inviting South County friends, given it is an evening event, and the location being in Venice. We invite donors and prospects as well as the general public since we have lawn seating for the concert.

**Committee**

Cathy Kuhlman and Steve La Fountain, Co-Chairs

REDACTED

**Past Performance**

	2015	2016	2017	2018 (goal)
Revenue	107,635	107,658	114,000	\$125,400
Expenses	34,471	35,724	40,000	\$40,683
Profit	73,164	71,934	74,000	\$84,717

**Sponsors (2017)**

REDACTED

November 18 Concert

**Description**

Two bands will perform at the Neel Performing Arts Center. This year's bands are Matt Walden (opening) and The Western Sons. Matt is a USF alum and the Western Sons has members from Sarasota/Bradenton. A VIP reception will be held to invite guests to meet the band in advance of the concert.



**Target Audience**

SCF students, prospective students, area high schools and the general public.

**Past Performance**

This is a new event and a trial to see if we can successfully attract a young audience to Neel for programming.

**Sponsors**

We are working with iHeart Media to determine their level of interest in sponsorship. Joey Pancek will be interviewing band representatives on "The View." We are working to see if a cover story on Ticket Magazine is a possibility.

**2018 Goal**

Revenue: \$10,000  
 Expenses: \$4,000  
 Net Profit: \$6,000

**Sundays at Neel****Description**

Entertainment provided in-season, Sundays at 2:00 p.m.

**Target Audience** 55+ crowd

**Committee**

Mark Morin, Barb Bourgoin, Cassandra Holmes, Jamie Smith, Jim Thaggard

**Past Performance**

	2015	2016	2017	2018
Revenue	81,655	91,960	75,130	\$82,643
Expenses	39,536	43,722	37,653	\$54,650
Profit	42,119	48,238	37,477	\$27,993

**Marketing Needs**

Glossy – One page, 8.5x11, or trifold. Will include YouTube reference, and web link to purchase tickets.

Advertising

Online purchasing tools in place by 10/15/17

Parking Communications – where and how distributed

Website – Will have YouTube hot links with pictures of acts

Post-season survey

Thank-you event for facility coordinators

Videos – student testimonials

Receptions at last two shows outdoor, food & beverage

**Team**

Mark Morin – Project Manager

Barb Bourgoin – Director of Development

Board of Directors – assigned solicitors

Music students

Faculty

Ushers – Train, get them to recruit friends. Opportunity to learn

### **Advertising**

Seasons – Full page in Oct, Nov, Dec,

SCENE Magazine – 1/3 page for Sundays, Avenues, EUS

Sarasota Magazine - 1/3 page ad

Ticket – Cassandra to check pricing

Radio Spots

TV spots – CAM secured \$15K of free TV

Website – need driving directions, how to purchase

### **Programming**

The Four Freshmen                      December 10, 2017

Jukebox Junction                         January 21, 2018

Tusk                                         January 28, 2018

The New Christy Minstrels             February 11, 2018

The Jersey Tenors                        February 15, 2018

Ethan Bortnick                             March 25, 2018

**Note: need athletes in parking lot, signage**

### **Prospects**

REDACTED

### **Special Events**

#### **Gator Den Opening**

Held August 17<sup>th</sup> on the Venice campus. Very successful with more than 100 in attendance.

#### **Library Grand Opening**

Tentative date is February 13, 2018.

#### **Parlor Parties**

Parlor Parties will be held in the President's dining room, in individual homes or businesses, or possibly outdoors on campus, weather permitting. The purpose is to bring together small groups of donors or prospects with similar interests to cultivate and encourage support of SCF.

### **Giving Challenge**

SCF has participated in the Giving Challenge in both 2015 and 2016. There was a break in 2017, but the next Challenge will be in May 2018. For our 2016 campaign, we distributed pledge cards at key events like alumni meetings, BOT meetings, office visits; four videos were produced in conjunction with CAM and were shared on our Alumni and Foundation Facebook pages, with BOD members, the SCF website main pages; emails were distributed and some were targeted, for example, to specific athletic groups.

A marketing plan will be developed when we have more information as to the theme and strategies of the upcoming Giving Challenge.

**2018 Goal**

Revenue	\$66,000
Expenses	\$2,000
Net Profit	\$64,000

**Grants**

Grants Received October 1, 2016 – October 1, 2017

125,000	
351,336	
159,900	
2,500	
4,600	
25,000	
1,825	
2,800	
60,000	
100,000	
2,284	
250	
1350	
2579	
2500	
2500	
25,000	
10,000	
10,000	
7,000	
TOTAL # GRANTS AWARDED: 20	TOTAL FUNDING: \$896,426





Prospects will be assigned to Foundation board members and staff who will develop cultivation plans, make asks as appropriate and steward donor relationships. Prospects are categorized as individuals, foundations and businesses.

### **Reports**

- Alumni Gifts
- Gifts Greater than \$1,000
- LYBUNT
- New Donor Reports
- SYBUNT
- Top Donor Report by category (individual, business, foundation)

### **Donor Retention**

Donor retention rates for the last three years are as follows:

2014/15 – 57%

2015-16 – 47%

2016-17 – 48%

Retention can be influenced by a number of factors. Donors may move, become deceased, lose touch with the organization or have a negative experience. Assigning donors to staff and/or board members and strong stewardship practices, as well as regular prospect reviews can assist in preventing donor departure. Utilizing LYBUNT (Last Year But Unfortunately Not This Year) or SYBUNT (Some Years But Unfortunately Not This Year) can help in monitoring donor giving at any point in the year.

### **Scholarship**

Scholarships are vital to the success of our students. Our scholarship coordinator provides concierge services to students and the SCF departmental staff through the application process, scholarship awarding and stewardship of scholarship funds. We host four program orientations, explaining the scholarship process. Annually a scholarship luncheon is held for new and current scholarship donors share student stories and expand the benefactor influence.

**Goal:** Increase scholarship funds by three or more each year  
Increase funding to current scholarships by \_\_\_%

### **Staffing**

The Foundation team consists of the following:

- Cassandra Homes, Executive Director
- Brenda Boynton, Executive Assistant
- Barb Bourgoin, Director of Development
- Brandon Mand, Constituent Database Manager
- Allison Nash, Scholarship Coordinator
- June Phillips, Specialist
- Melissa Shippee, Senior Accountant

Darlene Wedler Johnson, Grants Manager  
Erica Wuorio, Alumni Coordinator

**Board of Directors**

Cathy Kuhlman, Chair  
Michael Fuller, President  
Lisa Bristow, Treasurer  
Cassandra Holmes, Secretary  
Jodi Allen  
Dianne Anderson  
Rick Hager  
Bob Klingbeil  
Dorothy Korszen  
Lois Lucek  
Jennifer Michell  
Mark Morin  
Barbara Najmy  
Dr. Carol Probstfeld  
Christopher Romine  
Victoria Stultz  
Pamela Swain

**Women's Group**

A Women's group, possibly known as "Friends of SCF" will be established to support the college with advocacy, time and treasures to further the programs of the college. Whether it becomes an auxiliary, more focused on direct service volunteering, or a guild, focused on fundraising, will be determined by the charter members. An initial women's tea will be scheduled to invite a core group of women representing all communities served by SCF.