



AMERICAN PHILANTHROPIC
STRENGTHENING CIVIL SOCIETY

SPECIAL LEISURE SERVICES FOUNDATION

2018 SLSF GOALS

Prepared by American Philanthropic

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GOALS

GOAL 1: MAJOR GIFTS PROGRAM – MAIN FOCUS FOR NS AND TC IN 2018

Build a major gifts program by devoting more time to personal cultivation of potential major donors, creating a robust moves management system, and updating donor messaging to be more personal and donor-centric, rather than transactional and organization-centric.

Status: SLSF currently lacks staff time to cultivate individual donors. An effective major gifts program will require time to both research and meet with potential major donors. However, SLSF has a sizeable pool of current donors, event attendees, participant families, etc. to start its search for major gifts.

Strategy Notes: In this search for major donors, SLSF should focus specifically on moving current donors, sponsors, and participant families to the \$1,000+ gift size range. This effort will be aided by the creation of a moves management system to help SLSF staff track and remember previous interactions with, current goals for, and future meetings with major donors and prospects. SLSF will also be increasingly bold in making explicit asks, and shifting to a donor-centric, personal, and mission-focused pitch over an organization-centric, transactional, and need-focused pitch.

Key Tasks:

- Establish a pipeline of research on both new and prospective major donors to prepare for donor meetings.
 - Invest in a wealth research tool such as Wealth Engine or iWave (or invest in an outside contractor to conduct donor research and wealth screenings). – **American Philanthropic**
 - Research potential wealth screening and research tools (including an outside contractor).
 - Create a shortlist of options, weighing the benefits of each system.
 - Decide on a system and invest.
 - Have contracted with American Philanthropic to provide names and background information on donors in the NWSRA footprint that give to like causes.
 - Have contracted with American Philanthropic to provide letter templates.
 - Received a letter template on 4.3.18
 - Begin to build a database designed to store intel on the donors with whom SLSF will seek to carry out donor meetings.
 - Assess the ability of SLSF's current database system to successfully store a variety of donor-related information, including background information, giving history, net worth, contact info, and call and meeting notes.
 - Decide whether SLSF needs to invest in a new database system.
 - **CVCRM system should be installed by end of 2018**
 - Research potential database options such as Salesforce or DonorPerfect (if applicable).

- Begin using new database and train all SLSF on using it adequately (if applicable).
- NS is currently using ORACLE and Excel to keep track of donors and prospects
- Carry out research on current and prospective donors that SLSF is aware of.
 - Take SLSF's current database of donors, families, and event attendees and conduct a wealth screening to determine net worth and five year giving capacity.
 - Creating a "Top Ten" from each event. These are donors who have attended a particular event over a number of years, but have not moved past attendance. NS will contact each of those "Top Ten" to encourage them to move to sponsorship for themselves or their company.
 - **Top ten from GMFS and PHGO created.**
 - Perform due diligence research of publicly available information on those donors with the highest giving to SLSF, most frequent giving, greatest longevity of giving and (especially in the case of prospects) highest net worth and highest frequency of event attendance.
 - Every three months, or as needed, review and research new entries into SLSF's database to assess whether they would be good donor prospects.
- In addition to researching event attendees and others within SLSF's sphere of activities, spend time seeking new major donor prospects who would be attracted to supporting SLSF because of its mission.
 - Task outside contractor or staff member with regularly providing prospect profiles.
 - Research other local nonprofit organizations or organizations with similar or comparable missions.
 - Review their annual reports for their top donors, research those donors, and determine which may be good prospects for SLSF.
- Build out an infrastructure for a successful major donor meeting program.
 - Build a moves-management system that can track past interactions, goals, and next steps with each prospect or donor.
 - Either within SLSF's database or on a separate excel sheet, lay out those donors who SLSF will prioritize for meetings.
 - NS has begun a spreadsheet to track donor prospects and record contacts from the Event 10
 - Create tabs for basic information, next and last moves, goals, and notes.
 - TC, BS and NS have created a major annual giving program named after Kevin Kendrigan. It is called Kevin's Club. A mailing will be sent to a small initial group of those people who were personal friends of Kevin and were instrumental in the creation of NWSRA.
 - NS has reached out to Kevin's widow Cathy for approval of the use of Kevin's name and to request additional names to solicit.
 - A thank you event is being planned for all Kevin's Club members
 - NS sent follow-up postcards to each person who received a KC letter.
 - NS has spoken or exchanged emails with six of those who received letters. One

indicated they will definitely participate. One cannot, but will keep in mind for future. The other four are good candidates.

- Two people have sent in Kevin's Club donations.
- Nanette met one on one with a possible Kevin's Club donor in September
- Nanette met in October with 9 of Kevin's friends over lunch to discuss Kevin's Club and listen to their thoughts on the initiative.

■ Secure meetings with current and prospective major donors.

- Draft template meeting request letters, emails, and phone call scripts for current and prospective donors.
 - Letters were sent to two of the prospects whose names were provided by American Philanthropic. NS will send two more each month. Follow-up postcards and letters will also be sent to request a face to face meeting with each prospect.
 - Letters have been sent to all of the prospects provided by American Philanthropic. Postcards have also been sent. One prospect's letter came back undeliverable, so was sent to their Florida residence and also came back. No further outreach will be considered for that prospect.
- Prioritize current donors and donor prospects for meeting outreach.
 - Create a system of prioritization based on donor longevity, frequency of giving, gift size, and net worth.
 - Establish conditions for varying levels of priority.
 - Rank donors and donor prospects into three priority categories for meetings (high priority—meeting necessary, medium priority—meeting if time permits, and low priority—cultivate through other means). **In process**
- Reach out systematically to highest priority donors and prospects. **All are in process**
 - Call or e-mail top priority donors, requesting the opportunity to meet with them.
 - Bring collateral materials to share with donors.
 - Use some meetings to make an ask, some to build relationships. An ideal ratio is two meetings (or phone calls) without an ask for every meeting or call with an ask.
 - Thank donors with a hand-written thank you note sent the day after the meeting.

GOAL 2: FOUNDATIONS PROGRAM – MAIN FOCUS OF CATHY AND INTERN

Build up a systematic, strategic foundation solicitation program that includes regular prospect research, a steady pipeline of new foundation prospects, general operations and specialized proposal and letter templates, and moves management and deadline tracking systems.

Status: SLSF currently only has about 16 hours a week to devote to foundation solicitation. It has done well with the time it has, but devoting a full 40 hours a week (or close to it) is key to expanding its base of foundation support. SLSF has been supported predominantly by a handful of foundations, many of which renew their giving on a yearly basis. According to American Philanthropic's research, there are approximately 195 grantmaking foundations in the municipal areas served by NWSRA, and many more in the Chicago metro area that would be worth pursuing.

Strategy Notes: In addition to renewing (and possibly upgrading) current foundation supporters, SLSF will devote time to researching, soliciting, and acquiring new foundation supporters. SLSF will build up a database of local foundations that are good matches and begin to systematically initiate relationships with them. These efforts will be aided by the updating of proposal and letter templates as needed, and the creation of a moves management and deadline tracking system to keep track of past interactions with, current goals for, and future meetings with foundations.

Key Tasks:

- Review current foundation program:
 - Look over current foundation solicitation materials and revise as necessary to reflect a donor-centric, mission-oriented, and personal request.
 - Prepare updated templates of general operations letter of inquiry and grant proposal.
Ongoing
 - Prepare at least three updated templates of specialized program letters of inquiry and grant proposals, as they become necessary to suit foundation requirements.
Completed for Hanover Park Sensory Room, PURSUIT 4, Mount Prospect Sensory Room and STAR Program.
 - Assess current foundation relationships.
 - Review each current foundation relationship and assess likelihood of a. renewal of current grant level and b. upgrade of gift size.
 - Began to make initial contact with current foundations to confirm areas of support are aligned with the mission of SLSF.
 - Zurich NA sent a letter on 12/20/2017 notifying us that they are making some changes to their grant program. Grants will be by invitation only. Grants will support specific projects and volunteer opportunities, not general operations. If we are selected to apply, we will be notified in early March 2018. **SLSF has been invited to apply for a grant in 2018.
 - 1/15/2018 - Applying for Rotary Club of Palatine, Elk Grove Township, Women's Club of Inverness, Circle of Service Foundation and Rotary Club of Schaumburg and Hoffman.
 - By end of 1st Quarter, SLSF will have applied for over \$68,000 in grants. (See Grant Board Report for specifics)

- \$24,531 submitted for the creation of the Snoezelen Room at HPPD.
 - \$29,995 submitted for the creation of the Snoezelen Room at MPPD.
 - During the 2nd Quarter, SLSF applied for over \$28,753.50, IDOT vehicle and two letters of intent. (See Grant Board Report for specifics)
- Create moves-management system for foundation program.
 - Create a dashboard or Excel sheet of current and prospective foundation supporters, complete with basic information, application due dates, date of last meeting, date of next meeting, latest communication, goals, and notes. – 1/15/2018 The SLSF volunteer, Rashley Yerima, is creating a dashboard utilizing Asana which includes basic info, due dates, and any other pertinent information. SLSF will still utilize the Excel sheet for board updates and update as needed.
 - Review and update this tracking sheet at least monthly. Ongoing.
- Build up a pipeline of potential foundation grantees.
 - Consistently complete foundation prospect research.
 - Task staff member or outside contractor with foundation prospect research. Cathy and Rashley are dedicated to foundation prospect research.
 - Invest in a subscription to Foundation Directory and train staff member on use, if research is to be completed in house. Purchased 1/1/2018.
 - Using a foundation database or search engine, identify foundations based in the districts where SLSF operates. 1/15/2018 – Rashley and Cathy have begun to utilize the database to increase prospects.
 - Research whether these foundations would be a good match for SLSF by visiting their websites or looking at their 990s (the latter are available through Foundation Directory or a free subscription to Guidestar). Ongoing process
 - Identify wider Chicago-area prospects that may have an affinity for SLSF’s mission.
 - The Coleman Foundation
 - Elizabeth Morse Genius Charitable Trust
 - Hanover Township
 - Wheeling Township
 - Research whether these would be a good match for SLSF by visiting their websites or looking at their 990s. Ongoing process
 - Add all new foundation prospects to tracking sheet. Foundations added to Asana for research. Once foundation is investigated and approved for grant submittal, SLSF will add to Excel sheet.
 - Formulate a “next move” with each (usually meeting request letter or call, since relationships are key with foundations), as well as a gift goal (based on their average gift size on their 990), adding this information to the tracking sheet. Ongoing
- Maintain good relationships with existing foundation funders.

- Incorporate current funders into tracking sheet, including their key dates and deadlines. *Ongoing.*
- Add key dates (such as inquiry, application, and reporting deadlines) for 2018-2020 to development calendar. *Adding to Outlook Calendar once dates are publicized, including grant accountability forms.*
- Include current foundation funders on non-solicitation mailings and event invitations. *SLSF began doing this on 2.14.2018.*
- Attempt to meet with foundation contact annually or more, as SLSF has been doing.
 - Review contact history with each current funder to determine if and when last meetings have taken place. Prioritize those that have never been met with or not met with recently and set engagement strategy.
 - *1/20/2018 – SLSF to make contact with Vicky Beleski from Northrop Grumman, a lapsed foundation.*
 - *SLSF submitted a grant to Northrop Grumman on 3.2.2018*
 - Review and re-strategize approach with current contacts, as necessary.
 - Begin executing foundation meeting strategies as outlined in tracking sheet. *Ongoing.*
- Develop and execute re-approach strategies for all lapsed funders.
 - Incorporate lapsed funders and other past prospects into tracking sheet.
 - *In the 1st quarter, SLSF made contact with COSF, Northrop Grumman and UPS.*
 - Develop re-approach strategies with target dates.
 - *Circle of Service Foundation – SLSF hasn't applied to this foundation within the past two years. In 2018, SLSF made contact with the foundation and has been invited to apply for a grant to help fund the Sensory Room at the Hanover Park Park District.*
 - *UPS Foundation – SLSF was invited to apply for a grant for the HP Sensory Room.*
- Begin approaching new foundations.
 - Establish contact.
 - Starting with the foundations researched and added to the tracking sheet, utilize meeting request letters and phone calls to establish contact with foundation prospects. *Ongoing*
 - Request meetings with foundations and at meetings request permission to submit a proposal; consider inviting foundation representatives to events and recognizing them in that context. *As needed*
 - Research board members and trustees of foundations (information available on 990) and determine whether SLSF has existing connections. *Complete this every time a foundation is researched.*
 - Leverage board and trustee connections, sometimes “approaching” the foundation

- through a board member to increase chances of support and receive insider advice on how to apply, how much to request, etc. **Ongoing**
 - Be persistent in attempting to establish contact, as foundations can often be busy or hard to reach—persistence pays off. Frequently, it will take an initial letter and three or more phone calls or emails to establish contact and receive a satisfactory response. **Sent two new letters of intent to foundations which were rejected. Mailed a thank you letter for taking the time to read the request. Per the specifications, emailed, not called, both foundations to make introductions and inquire about additional grants.**
 - Consider sending invitations to events to local foundation addresses as appropriate. **Done**
- Consistently send letters of inquiry, or proposals as appropriate, when an initial meeting or phone call is not possible, or after a successful meeting.
 - Follow up a week after sending letter of inquiry or proposal to ensure that the foundation has received SLSF's materials. **Will only do this if SLSF doesn't receive a confirmation email of receipt of materials.**
 - Continue to follow up consistently until contact can be established.
 - In the case of a successful meeting, promptly submit a proposal or application.
 - In the case of rejection, thank the foundation and let them know that you will be including them on your newsletter so that they can stay abreast of developments. **Done**
 - Try again with rejections after 6-12 months.
 - From the beginning of the process, be sure to follow all foundation directives about how and when to apply, which may be found online or on the foundation's tax filings.
 - **Autism Speaks – Applied January for the HPPD Sensory Room.**
- **Cathy will work with Rashley on creating a grant volunteer report that details his work during his 10 weeks. – Completed on March 5, 2018.**

GOAL 3: DIRECT MAIL

Restructure current direct mail (annual appeal) program, bringing it in line with industry standards, and experimenting with strategic prospect mailing to acquire new donors.

Status: Presently, SLSF sends out a spring and end of year appeal. These letters do very well from the point of view of response rates and return on cost. However, many organizations go into the mail more frequently, sending at least quarterly appeals. SLSF sends out many non-solicitation letters already, meaning that it is in a good position to even out the ratio of ask to non-ask correspondence. Moreover, SLSF's appeals lack some of the

standard practices that contribute to a strong appeal, including an explicit ask, a personalized address, and a longer message. SLSF also does not currently undertake prospect mailing to acquire new donors and grow its file.

Strategy Notes: There will be three priorities for SLSF as it seeks to restructure its direct mail program: 1. Mail an explicit ask quarterly; 2. Experiment with different approaches in appeals (i.e., test longer letters vs. postcards); 3. Carry out some prospect mailing to see if it can become a reliable source of new donors over time. This will require a significant investment in time on task for writing and designing letters and coordinating with printers for delivery. It will also require additional investments in printing and postage costs.

Key Tasks:

- Establish a quarterly housefile mailing program.
 - Reform current appeal program.
 - Begin writing longer (2-4 page) solicitation letters, testing the longer letter against the shorter postcard by constituency (i.e., parents, supporters, etc.).
 - NS worked work with TC and BS to adapt the American Philanthropic letter template received on 4.4.18 and it was sent as the Spring Appeal.
 - Always make an explicit ask in your letters.
 - Try to reduce the ratio of non-solicitation mailings to roughly 1 solicitation to 1-2 non-solicitations. Postcard invitations to the Snoezelen Open House were sent in September. These were invitations to attend, not a solicitation.
 - Simplify SLSF's solicitation package, using a plain envelope with address information printed on the front. This was done with the Spring Appeal
 - Continuously check messaging in mail appeals to ensure that it is personal, mission-oriented, and donor-centric.
 - Establish a mailing schedule:
 - January 20, 2018: Begin preparing spring appeal
 - In January sent a Happy New Year postcard with SLSF and NWSRA calendar to all persons on SLSF mailing list.
 - March 15, 2018: Put spring appeal in the mail. Sent in May.
 - April 20, 2018: Begin preparing summer appeal.
 - June 1, 2018: Put summer appeal in the mail. No summer appeal in 2018
 - Spring Appeal wasn't sent until end of May. Have mailed/handed out over 200 postcard invitations to the Craft Beer and Wine Fest that will benefit PURSUIT. Have also sent the information via email.
 - July 20, 2018: Begin preparing fall appeal. Anticipate this being a postcard inviting people to check out new the updated website and donate online.
 - September 15, 2018: Put fall appeal in the mail. Plan to have a copy of the postcard included in the SLSF Impact.
 - September 20, 2018: Begin preparing end of year appeal. IN PROCESS
 - October 1: Begin preparing brief non-solicitation update letter.

- October 20: Send brief non-solicitation update letter to housefile.
- November 20: Put end of year appeal in the mail.
- December 20: Consider sending a reminder postcard for the end of year appeal that will land right before Dec. 31.
- Repeat mailing schedule yearly, adjusting as necessary.
- Accompany each appeal with an e-campaign (end of year e-campaign should be the largest).
 - Spring through fall campaigns should be 3-5 e-mails, the first introducing a campaign goal (a concrete amount, i.e., \$5,000) with a “soft ask,” the second to last making a hard ask, and the last letting everyone know that the campaign is over and that you met X% of the goal (while still offering a donate button so that people can give after the campaign). **NS will give an update on total spring appeal contribution to be included in the SLSF Impact with a request to assist in making the \$5000 goal.**
 - The end of year appeal should be similar, building up to an ask over 10 days with 5 to 7 e-mails and an explicit goal.
 - Carry out a Giving Tuesday campaign or a “last minute” campaign, offering donors the opportunity to donate one last time for a charitable donation within the fiscal year. Set a campaign goal along with 4-6 emails. **SLSF is considering a Last Minute Email campaign to be sent the second week of December.**
- Follow up:
 - Thank all donors who give through the appeals, following a set system for which level of donors are recognized in what ways.
 - **All donors receive thank you letters. Donors of \$500-\$999 receive a thank you phone call from NS. Donors of \$1000+ receive a thank you phone call from an SLSF Board Member. Jonathan Salk is currently doing the calls.**
 - Research all donors who give through appeal letters and select the highest ranking (highest net worth, longest giving history, largest gift, and greatest frequency of giving) among them for meeting requests. **Excel spreadsheet is in process.**
- Experiment with prospect mailings.
 - Discuss potential approaches to prospect mailing including:
 - Renting or exchanging lists with like-minded or local organizations.
 - Renting ZIP code or geographic area lists from the post office based on high-net worth areas of NWSRA’s service region.
 - Prepare prospect mailings.
 - Test a 6-8 page letter introducing potential donors to SLSF.
 - Create a one-page reply form, business reply envelope (with the post office), invest in nonprofit postage (with post office, if not done already), and consider possible inserts for the letter (i.e., an SLSF magnet).
 - Test the results from a 9x12 envelope versus a half sheet 6x9 envelope. Postage costs will be greater for the 9x12, but we often see better results from the larger package.
 - Coordinate with list brokers to acquire mailing lists.

- Find a printer to handle production, stamping, and sending of letters.
- Create a tracking sheet that records the effectiveness of each mailing, broken down by lists used or package specs tested.
- Establish a direct mail prospecting schedule, dropping approximately twice per year and scaling up to three or four drops per year if initial results are promising in year one and year two.
 - January 5, 2018: Begin preparing first prospecting piece.
 - February 20, 2018: Drop first prospecting piece
 - Sent first piece in June
 - August 1, 2018: Begin preparing second prospecting piece.
 - October 1, 2018: Drop first prospecting piece.
- Create and organized system of mailing evaluation and record keeping
 - Continue to track results of each appeal letter, including results of split tests (i.e., longer letter v. postcard). **Excel spreadsheets are created.**
 - Track results of prospecting attempts, seeing which methods of direct mail prospecting yield the best results.
 - Make sure that the database is equipped to track individual donor giving over time.

GOAL 4: PLANNED GIVING

Establish a basic planned giving program that alerts parents, grandparents, volunteers, and donors to the possibility of including SLSF in their legacy plans, while recognizing those that have already done so.

Status: Currently, SLSF has no planned giving program in place. However, given the nature of its work, it has potential to make huge returns over time by publicizing its ability to receive planned gifts. Because so many parents and grandparents are involved in the life of the organization, making an appeal to family that they can make SLSF part of their legacy could be a relatively high-yield fundraising strategy with relatively little investment in time and money (though patience will be required!).

Strategy Notes: Implementing a basic planned giving program is not time-consuming or complex if done correctly and consistently over time. All it requires is letting people know that SLSF accepts planned gifts, and offering them the opportunity to make SLSF part of their legacy. To make this pitch successful, SLSF will want to focus on what sort of legacy people want to leave when they pass away. SLSF's programs, which directly contribute to the happiness and thriving of disabled friends and family members, are a very worthy candidate for a planned gift. A successful planned giving program for SLSF will not require many hard "sells," but rather lots of time building relationships with potential donors. Planned gifts will flow naturally out of other strategies that establish these relationships, particularly meetings with major donors.

Key Tasks:

- Create planned giving society.
 - Come up with a name, stock language, and benefits for SLSF's planned giving society members.
 - Review other examples of planned giving programs for nonprofits.
 - Brainstorm a name for the planned giving society, possibly invoking the founder of NWSRA/SLSF.
 - Write a short description of the society that lets donors know how their giving can become part of a great legacy of support for a worthy cause.
 - Think of reasonable and feasible ways to recognize members of the planned giving society.
 - If possible, find an existing planned gift or acquire one from a dedicated supporter or board member who is willing to step up and provide a testimonial about why they made SLSF a part of their legacy plans.
 - SLSF has put a line about planned gifts on all correspondence.
 - On 4.3.18 NS was informed of a donor who gave a planned gift in their trust. That donor has now passed away and the trust will send a check in the near future. The amount was not disclosed to NS during the phone call.
 - This gift was received in June.
 - Familiarize SLSF development staff with some of the basics of accepting and handling planned gifts especially those staff members who will be meeting with major donors.
 - Research types of planned gifts and think about what would be required to accept them.
 - NS spoke to David Hanson, SLSF's financial planner; he suggested we tell donors interested in making a planned gift to contact their trust manager/financial planner to get advice on how to make a gift.
 - NS also spoke to board member Brian Rubin who suggested that she let potential donors know that the easiest way to make a planned gift is to name SLSF as a beneficiary in their life insurance. Brian suggested that rather than name a particular amount, that the policy be amended to give SLSF a percentage of the benefit.
 - Implement necessary structures for receiving planned gifts, such as opening a brokerage account for SLSF and having a lawyer or financial advisor to call in a situation where SLSF would need more detailed advice on a particular situation.
 - In speaking with Dave Hanson, NS was assured that if SLSF were to receive a large planned gift, he has the expertise to make certain it is properly handled.
- Create planned giving collateral material.
 - Create a simple planned giving brochure that lets donors know about the possibility of making a planned gift.
 - Design brochure, integrating images, language on the giving society, and some brief notes on how to make an estate gift to SLSF.
 - Find a professional printer who can produce a supply of high-quality brochures.

- Integrate planned giving options on all relevant donor materials (for example, include an “I would like to learn more about planned giving to SLSF” and an “I have already made plans to include SLSF in my estate” checkbox on annual appeal reply form).
- Spread the word.
 - Have brochures on hand to share at donor meetings, when appropriate.
 - Launch a planned giving page on the SLSF website.
 - Include the planned giving brochure among collateral materials at SLSF events.
 - Once a year, conduct a planned giving mail campaign, sending a cover letter and planned giving brochure to key audiences.