

2019 Goals

I. Major Gifts Program

- a. Continue to establish a pipeline of research on both new and prospective major donors to prepare for donor meetings.
 - i. Continue to build and update a database designed to store info on donors with whom SLSF will seek to carry out donor meetings.
 1. In process
 - ii. Continue to carry out research on current and prospective donors from the SLSF database
 1. Continue Event Top 10 but change to Event Top 20, (10 donors from 2018 and 10 new donors from 2019)
 - a. Have created a GMFS Event Top 20
 - b. Beginning to work on this with Foundation Manager.
 - c. Staff contacted donors from events through annual appeal letter. Need to slowly build a relationship with many attendees.
 - iii. Continue to research new major donor prospects who would be attracted to supporting SLSF because of its mission
 1. Using a list of businesses provided by board member Christina Ferraro to research possible donors
 2. Attended networking events to continue to build the donor pipeline.
 3. Letters were sent to 5-6 new businesses from Christina Ferraro's list.
 4. SLSF staff will continue working on building relationships and contact at least one individual a month in 2020.
- b. Continue to build out an infrastructure for a successful major donor meeting program
 - i. Continue to solicit Kevin's Club to donors. Use the American Philanthropic letter template to fit Kevin's friends and donors who would be interested in joining Kevin's Club. SLSF will also send this letter to lapsed SLSF donors.
 1. Included all on the Kevin's Club list in the spring appeal mailing.
 2. Superintendent sent letters to Kevin's Club members to introduce herself and requested an individual meeting.
 3. Superintendent followed up with phone calls. Meetings will be set for 2020.
- c. Continue to secure meetings with current and prospective major donors
 - i. Plan at least one meeting per month
 1. Sent the American Philanthropic letter to the Pritzker and Citadel Foundations
 2. Have secured a May meeting with the CEO of the Aarete Company to discuss possible sponsorship opportunities

3. Due to the retirement of Nanette at the end of August, no meetings were scheduled in September. Will begin to schedule the meetings for October and November.
 4. Goal for 2020 due to new staff beginning to review the donor database.
- d. Superintendent of Development and SLSF Board Member will continue to make personal thank you phone calls to donors over \$500 on a monthly basis.
- i. Each month the SOD will pull a list of donations and divide into \$500-\$999 and \$1000+ donors and email list to Board member by second week of the following month
 - ii. Phone calls will be made within that same week
 1. Calls have been made through June donors
 2. Personal calls will be made by the end of October with the list shared between the Superintendent of Development and Board members.
 3. Personal calls were made to Impact Auction donors and any other donor above the \$1,000.
 4. Staff and board member contacted those who gave to the Holiday Annual Appeal.

II. Foundation Program

- a. Continue to maintain good relationships with existing foundation funders
- i. **First Quarter:**
 1. Submitted seven grants (five from existing funders) and one LOI
 2. Contacted Michael Hutchins from Northrop Grumman for new contact person.
 3. Contacted UPS for grant inquiry. Will follow up by 4/30/2019 if have not received correspondence.
 4. Zurich has a new grant application system. SLSF will be notified by the end of April regarding invitation to apply.
 5. Spoke to IDOT regarding 2018 CVP Application. New contact person Zoe Keller; Mike Healy left. Agencies should be notified by the end of April if grant is accepted.
 - ii. **Second Quarter**
 1. IDOT - June 10, 2019 left another message for Zoe. Currently waiting for the reply.
 2. Submitted five proposals (all existing funders)
 3. Followed up with UPS regarding grant submittal. Awaiting reply.
 4. SLSF invited to apply for Zurich grant application – submitted and awarded funds.
 5. Received \$21,500 in private funding from grant awards.
 6. Continue to research new grant opportunities through Foundation Directory Online
 - iii. **Third Quarter**

1. Submitted five grants (four from existing funders).
 2. Followed up with Northrop Grumman.
 3. Continue to research new grant opportunities through Foundation Directory Online.
- iv. **Fourth Quarter**
 1. Submitted grant at RSM per request of prior board member Vicky Carney. Was awarded a \$5,000 grant.
 2. IDOT approved the 2018 application for the 14 passenger vehicle.
 3. Submitted a grant to IICF per request from board member Al Crook.
- b. Solicit grants for capital projects
 - i. **First Quarter:** submitted three grants for PURSUIT 4
 - ii. **Second Quarter:** submitted one grant for PURSUIT 4
 - iii. **Third Quarter:** submitted one grant for Accessible Transportation
 - c. Continue to approach new foundations
 - i. Submit 3 new grants to new foundations
 1. Patrick & Anna Cudahy Fund – submitted a LOI on 2/11/2019
 2. Helen Brach Foundation – submitted but not approved on 3/30/2019
 3. Chicago Bears – Community All Pros – submitted on 5/30/2019
 4. RSM US Foundation – per Vicky Carney – submitted on 7/2/2019
 5. Insurance Industry Charitable Foundation – per Al Crook submitted on 11/22/2019
 - ii. Reach out to the agencies and associations provided from the legislative breakfast for funding opportunities. **In process of researching.**
- III. **Direct Mail**
- a. Continue to reform current appeal program
 - i. January 2019 postcard to include the SLSF link for website “Thank You for Our 2018 Success!” Highlight major projects that happened in 2018.
 1. **Sent in January - Completed**
 - ii. Spring Appeal will be a postcard for Day Camp Scholarships. One page, slick, colorful, quick read and grabs your attention
 1. **Sent in mid-April - Completed**
 - iii. After Summer Camp/Summer Appeal postcard “Thank You for Summer Camp!” Include a cute photo, SLSF website.
 1. **NWSRA campers created thank you cards that were sent to all summer appeal donors.**
 - iv. Have a postcard sent to advertise the late summer/early fall golf outings and send to previous participants/sponsors from last four years.
 1. **Sent in June -Completed**
 - b. Follow Up
 - i. Continue to send thank you letters/postcards to donors.
 1. **Completed within a week of receipt of donation**
 - c. Experiment with prospect mailings
 - i. SLSF will tweak the long A.P. letter to send to targeted donors

- ii. SLSF will use Director Ferraro's list of new donors from the Mount Prospect area to solicit sponsors and/or prizes.
 - 1. In process
 - 2. SLSF Foundation Manager mailed letters to 5 new businesses in October. Will follow up in 2020.
- d. Continue to keep an organized system of mailing evaluations and record keeping
- e. Sent Holiday Annual Appeal – segmenting the donor base
 - i. NWSRA families who have never given to SLSF
 - ii. Consistent donors
 - iii. Inconsistent/lapsed donors
 - iv. Event attendees

IV. Planned Giving

- a. Create planned giving collateral material.
- b. Solicit planned giving to SLSF donors and board members
- c. Continue to include information about planned giving 3 times a year in the newsletter and board report.
 - i. Included information in the June Impact
 - ii. Discussed this opportunity at the May SLSF board meeting
- d. Add to the SLSF email signature *"What's your Legacy?" Consider a planned gift. Contact Nanette Sowa to discuss what you can do.*
 - i. Added in January 2019
- e. Continue education to SLSF donors, board members and staff about planned giving
 - i. SLSF will continue to work on this goal in 2020.

V. Board Development

- a. SLSF will identify specific duties to board members
 - i. Jonathan Salk helps make thank you calls to donors. Refer to Board Member table 2018.
 - 1. In progress
 - ii. Seek input at Board Member one on one meetings as to activities that interest each Board Member and find ways to get them involved
 - 1. In process
 - 2. Meetings have continued through the second quarter. Cathy Splett is now joining Nanette at the meetings.
 - 3. Superintendent of Development will continue scheduling meetings for 2020
 - iii. Utilizing their strengths and gearing them toward actions that are necessary to help SLSF become more successful
- b. Adding a board member report section to the SLSF Board meeting
 - i. Allowing board members to talk about what they are doing to help SLSF become successful. This will not be mandatory but will be encouraged for each board member to update the other board members and it is hoped will lead to additional board engagement