Schauer Arts and Activities Center - Action Plan I (adopted 3-28-2006)

GOAL STATEMENT: Increase unearned income – take fundraising to the next level.					
Objectives	Inputs – What Steps/Actions Do We Need to Take For Each Objective?	Expected Outputs/Outcomes	Human And/Or Capital Resources Needed?	Who's Responsible?	By When?
1. Examine current and future fundraising techniques and strategies.	1a. Survey similar organizations that have a fund-raiser/development director position. Ask questions like: ➢ What was the thinking that led you to hire this position? ➢ How long have you had this position? ➢ How is this position funded? ➢ What was your unearned income before the position compared to after? ➢ What's your evaluation of this position's success?	1a. Obtain background information needed to make an informed decision.	1a. Time to complete a survey of similar organizations.	1a. Executive Director	1a. 5-1-08
	1b. Solicit proposals from consultants on cost to review past and present annual fundraising efforts and recommend new directions/advance-ment	1b. Obtain background information needed to make an informed decision.	1b. RFP for a consultant to review past & present planned giving, corporate sponsorship, Friends Campaign, events, endowments, etc.	1b. Fundraising Committee and Executive Director	1b. COMPLETE
	1c. Identify funding source for consultant's fees (grant or sponsor)	1c. Obtain professional assistance w/o affecting budget	1c. Evaluate/solicit funding options	1c. Fundraising Committee and Executive Director	1c. COMPLETE

Schauer Arts and Activities Center - Action Plan I (continued)

GOAL STATEMENT: Increase unearned income - take fundraising to the next level.

Objectives	Inputs - What Steps/Actions Do We Need to Take For Each Objective?	Expected Outputs/Outcomes	Human And/Or Capital Resources Needed?	Who's Responsible?	By When?
2. Increase Board members' sophistication and activities in prospecting fundraising opportunities and in decision-making	2. Use information gained from survey and consultants to determine whether to use a consultant or hire a position	2. Make an informed decision that helps set the future of fundraising for the Schauer Center.		2. The Board.	2. Ongoing
3. Recruit Board member(s) with fundraising savvy and experience	3. Governance Committee become more proactive in identifying and approaching potential Board members	3. Increased diversity on Board with fundraising strengths	3. Time and contacts	3. Board Development Committee and Executive Director	3. Annually by May 1
4. Identify and apply for new grant opportunities	4. Review and narrow grant opportunities to 3-5 likely agencies and apply	4. Increased unearned income	4. Time	4. Fundraising Committee and Executive Director	4. Annually
5. Fundraising Committee set $ goals for unearned income; review past sources of unearned income and build on successes; identify new sources; and create action plans to implement increase unearned income in broader geographic area	5. Set aside time in Committee meetings	5. Increased unearned income	5. Time and talents of Committee members	5. Fundraising Committee and Executive Director	5. Ongoing PLEASE SEE ATTACHED FUND-RAISING ACTION PLAN RESULTING FROM CONSULTANT ASSESSMENT

Schauer Arts and Activities Center - Action Plan II (adopted 3-28-06)

GOAL STATEMENT: Increase earned income to 50% of operating budget over the next three years.					
Objectives	Inputs - What Steps/Actions Do We Need to Take For Each Objective?	Expected Outputs/Outcomes	Human And/Or Capital Resources Needed?	Who's Responsible?	By When?
1. Develop a plan to maximize use of Schauer Center's physical facilities for arts, social, and business activities.	1. Marketing Committee create action plan	1. Increased earned income.	1. Marketing plan for facilities	1. Marketing Committee, Marketing Coordinator, and Executive Director	1. 6-30-08
2. Develop a plan to maximize income from Schauer's own programs	2. Marketing Committee create action plan	2. Increased earned income.	2. Marketing plan for programs	2. Marketing Committee, Marketing Coordinator, and Executive Director	2. 6-30-08
3. Explore other sources of incidental income	3. Investigate feasibility of handling/managing our own beverage service				3. Ongoing

Schauer Arts and Activities Center - Action Plan III (adopted 3-28-06)

GOAL STATEMENT: Provide cost effective, high quality educational programs that meet community needs, develop future "artists", and increase appreciation for the arts.

Objectives	Inputs - What Steps/Actions Do We Need to Take For Each Objective?	Expected Outputs/Outcomes	Human And/Or Capital Resources Needed?	Who's Responsible?	By When?
1. Provide educational activities in a variety of art forms through a variety of "programs" - Community School of the Arts - Performer/artist Workshops in house - School time matinees - Artist(s) in residence - Arts immersion day - Outreach activities - Etc.	1.Base decision-making for activities offered on a variety of inputs that may include: - A budget for each "program" that strives for self-sufficiency (recovery of activity & operating costs) - Past classes/workshops offered and successfully held - Review of successful classes/workshops offered by similar organizations - Changing demographics and interests - Occasional community needs assessment - Etc. 2. Create a budget format that tracks educational programs	1a. Successful, fiscally responsible activities that meet community needs 1b. Build greater participation in and support for programs	1a. Staff and Committee effort and time 1b. Instructors to lead, teach, facilitate, etc. programs	1. Education Committee, Program Services Director, and Executive Director	1. Ongoing

Schauer Arts and Activities Center – FUNDRAISING ACTION PLAN (APPROVED 1-22-08, pg. 1)

GOAL STATEMENT: Develop a Fundraising Action Plan in Response to Sam Macklem's Fundraising Assessment

Recommendation	Inputs – What Steps/Actions Do We Need to Take For Each Objective?	Expected Outputs/Outcomes	Funding Needed?	Who's Responsible?	By When?
1. Define the Region – what are the borders of the Schauer's intended fund development area?	Committee Discussion & Resolution	The Schauer's fundraising region shall include all of Washington County & the portion of Dodge County East of Hwy 26 The Fundraising region may not correspond exactly with our Marketing region	No	Fundraising Committee & staff	Completed 8-8-07 during Fundraising Meeting
2. Develop a Comprehensive, Strategic Regional Marketing Plan	Committee Discussion Plan should be realistic about implementation considering limited capital and human resources. Also, Marketing Region needs to be defined.	Refer to Marketing Committee Increased exposure, awareness, visibililty resulting in greater program patronage, facility usage, and ultimately donor loyalty	Yes, but development of such a plan should be contingent on grant funding through the NPMF	Marketing Consultant, Marketing Committee, & staff	Referred to Marketing Committee; planned completion now 9/30/2008
3. Define, Monitor, and Train Board of Trustees related to involvement in fundraising activities	Develop Guidelines ("Cheat Sheet"), Tips on `Fundraising Do's and Don'ts Develop Summary of Funding Opportunities which support Schauer Supply all Trustees with Exec Director's business cards Develop Trustee Mentoring	Trustees segmented into groups: Identifying, Asking, and Thanking Trustees more engaged in fundraising activities Increased fundraising results	No	Fundraising Committee Governance Committee Staff	Ongoing

Schauer Arts and Activities Center - FUNDRAISING ACTION PLAN (APPROVED 1-22-08, pg. 2)

GOAL STATEMENT: Develop a Fundraising Action Plan in Response to Sam Macklem's Fundraising Assessment

Objectives	Inputs - What Steps/Actions Do We Need to Take For Each Objective?	Expected Outputs/Outcomes	Human And/Or Capital Resources Needed?	Who's Responsible?	By When?
4. Hire Director of Development	Identifying Funding Mechanism Needs to be a full-time position beginning sometime during the 2008-09 Fiscal Year	Deferring any action on this till Budgeting process for FY09 Exec Director to investigate possible start-up funding by Greater Milw Foundation	Yes - need to pay salary and benefits	Board & Staff	Fiscal Year '09
5. Establish a New Case for Support of the Center	Develop Publications which outline: A Case for Support & Menu of Ways to Support the Center	Increased fundraising results through a better definition of need and donor confidence	Yes	Fundraising Committee & Staff	Nov 1, 2007
	Publish an annual report summarizing goals, objectives, financial info, and highlights of past year.	Cultivate connectedness to stakeholders.	Staff Time & Print Exp	Staff	Oct 1, 2008 (Annually)
6. Refocus approach to individual giving ("Friends")	Discontinue November Phonathon	Increased individual giving	None	Fundraising Committee & Staff	Nov 1, 2007
	Institute more assertive approach to personally thank donors & tweak benefits	Encourage repeat giving at increased levels.	Yes	Board of Trustees Fundraising Comm & Staff	June 1, 2008
	Phase out "Business Friends"	Re-direct business giving to sponsorships & advertising. Corporate sponsors eligible for former "Friends" benefits as appropriate.			April 1, 2008
	More regional focus on individual giving	Move from 70% to 60% Hartford support		Development Director & Board	July 1, 2010

Schauer Arts and Activities Center - FUNDRAISING ACTION PLAN (APPROVED 1-22-08, pg. 3)

GOAL STATEMENT: Develop a Fundraising Action Plan in Response to Sam Macklem's Fundraising Assessment

Objectives	Inputs - What Steps/Actions Do We Need to Take For Each Objective?	Expected Outputs/Outcomes	Human And/Or Capital Resources Needed?	Who's Responsible?	By When?
7. Refocus approach to Special Events	Subcommittee to explore & identify possibilities for signature, key major special event	Concentrated effort on one major, high grossing fundraiser - minimum net proceeds of $25,000	????????	Fundraising Comm & Staff	March 1, 2009
8. Develop Planned Giving Techniques & Strategies (estate planning, wills, etc.)	Develop Acceptance of Unrestricted Planned Gifts and Endowment Income Distribution policies.	Executive Committee Research & Review	Endowment Funds invested through Hartford Area Foundation	Exec Comm & Legal Standards; Recommendation & BOT adoption.	May 27, 2008
	Establish Legacy Society (quiet launch & recruitment phase)	Identifying future long-term support and vested interest in Schauer.		Board Resolution	May 27, 2008 & ongoing
	Public Launch & Naming of Legacy Society (10th anniversary of Schauer)	A minimum of 5 families committed to a legacy gift by July 1, 2010.		Board & Staff	July 1, 2010.
	Promote Legacy Society & Endowment Fund through info distributed through Attorneys, Financial Planners, Funeral Homes, Banks, and through standard pubs.	Greater awareness of this opportunity to make a lifetime gift. Build Endowment Fund to put Schauer on more solid financial footing and provide opportunity for program enhancement & expansion.		Staff	Ongoing beginning now

GOAL STATEMENT: Develop a Fundraising Action Plan in Response to Sam Macklem's Fundraising Assessment

Objectives	Inputs - What Steps Do We Need to Take For Each Objective?	Expected Outputs/Outcomes	Human And/Or Capital Resources Needed?	Who's Responsible?	By When?
9. Diversify Event Corporate Sponsor Support Regionally (or playbook advertising)	Regional diversification of board composition. Regional diversification of program patronage (ie. audience members, students, etc.) See Marketing Plan Discussion	A more diversified and thus stronger supporter base ranging from volunteers to patrons to donors	Staff, Board, Time	Governance Committee Marketing Committee	Move ratio of Hartford support to non-Hartford support from 78/22 to 65/35 by July 1, 2010
	Further refine "Community Night" sponsorship concept (involve more communities) through targeted promotion of Chambers and other community groups.	Perhaps a printed piece will help support the recruitment and maintenance of these community night partnerships		Fundraising Committee	Ongoing
	Institute Task Force for West Bend Fundraising Institute Task force for Dodge County Fundraising Move from 78% to 65% Hartford support	Potentially future support may flow from Washington & Dodge counties as the Schauer Center is viewed as a integral cultural resource to each county's citizens		Board & Fundraising Comm Board & Fundraising Comm	April 1, 2008 April 1, 2009
10. Involve Marketing to a Greater Degree in preparation of Fundraising Solicitation Materials	Create & encourage ongoing dialogue and healthy working relationship between development & marketing	Strong publications and communications which accurately & successfully project identity & brand image	Fundraising Expense print, design, mail	Marketing Comm Fundraising Comm Staff	Ongoing
11. Fine tune and enhance donor stewardship tactics (become "donor centered")	Plan donor appreciation functions	Donor loyalty and retention	Personnel to plan and execute this "feed and care" of donors	Fundraising Comm & Staff	Every 2-3 years - January 2009?