

Shimer College Development Long Term Plan
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1. Executive Summary

The Development Office's role is to meet fundraising goals and build stable, long term revenue structures including operating and endowed funds. We aim to strengthen donor relations, and *all* external relationships, through a culture of foresight and positivity in the Shimer community.

We partner with the rest of the College in building visibility and brand in the higher education community, and strengthen our market position in collaboration with Admission.

The Socratic method is built upon shared values and various voices coming together and making different contributions to create a community. The same is true of bringing the value of Shimer College to donors, as investors and new partners.

Objectives

Our primary goal: meet fundraising goal of \$900,000, with responsibility first to operating expenses, and with a horizon goal of building endowment to meet long term funding priorities.

The development team

- establishes and meets fundraising goals (with the president and the board of trustees);
- cultivates and stewards the high level volunteer leadership and major donors; establishes means to examine operating relief needs as well as new collaborations and initiatives;
- grows donor base among the Chicago philanthropic community;
- identifies and cultivates higher education funders throughout the US;
- works with students, faculty, and staff to create a single message to apply to the life cycle of the student and donor/alumni;
- cultivates, engages, and solicits alumni;
- grows the planned giving society and annual fund.

The Marketplace

The 501(c)(3) marketplace is crowded with worthy causes. Shimer's share of the marketplace is small partially because the alumni base is small, and partially because the attempts at differentiation and messaging have been fitful. Shimer is a niche but is doing work that is relevant, applicable in the workplace, and constitutive of a fulfilling life.

Our target market comprises alumni and high level funders with an interest in broadening access to the liberal arts.

The alumni profile is incredibly broad: if such a diverse alumni base is unable to donate at significant levels, can it open doors or tell the story? Can it advise us at some level and give perspective or advice? Who can bring the College new students, or new partnerships with corporations (via matching gifts, for example)?

New donors: where are they coming from? Research tools, high level volunteer outreach, College events and programming, solicitation of foundations and corporations all will contribute to diversifying the donor pool.

Development Office Tools and Services

The role of the Development Office is to identify, research, cultivate, solicit, and steward all donors on a daily basis.

People involved include:

- Alumni relations staff to a) cultivate and provide opportunity for alumni to both self-identify AND help find other alumni, and b) show-and-tell the importance of the Shimer education to others,
- External affairs and development writer to create the message, tone, and content for general collateral that will position Shimer (newsletters, appeal letters, proposals etc),
- Annual fund coordinator to drive the operating funds and maintain integrity of data (a hidden priority in all development departments),
- Board liaison to a) steward board, b) give board opportunity to develop solicitation plans of their own that address Shimer's needs, c) participate fully in the life of the college,
- Director to a) manage strategy for operating giving as well as endowment and restricted gifts, b) pursue individuals, foundations, corporations and public money, c) maintain schedule of travel and visits for President (our chief fundraiser), d) join fundraising mission to all departments so that needs are met, e) build new relationships within higher education funding pool and Chicagoland philanthropic pool.

Outreach and Strategy

- Send annual fund appeal by Oct 7, and coordinate with student phone-a-thon.
- Year end message regarding tax benefits of giving before December 31 (e-mail).
- All alumni and major donors receive customized follow-up via phone, e-mail, note, or personal visit as appropriate.
- New donor pool with capacity of (dollar amount) identified and researched.
- External relations: development of marketing and communications procedures, branding, and messaging.
- Create slate of informal
 - Engage board members vis-à-vis planned giving and endowment needs. (Plan to grow endowment created for Spring 2012 board meeting.)
 - Foundations and corporations: reach out with interest-tailored proposals or letters of inquiry if necessary.
 - Identify five alumni volunteers to help with Hostetter Society outreach and development. Create planned giving “mini task force” to grow alumni subscription to planned giving society as part of a major initiative in FY 2012-2013. (At this time, we have identified several members of the alumni association who are willing to discuss planned giving options with fellow alumni. We will create collateral for this purpose, especially via new web communications).
 - Cultivate and solicit new donor pool.
 - Solidify marketing, PR and communications strategy. Solidify slate of contacts for press releases. Develop community outreach plan (legislators et al.). Discuss possibility of “mini task force” for communications and branding.
 - Research and implement “alternative giving:” micro funding and online giving.
 - Give Alumni Association and Board forum to discuss opportunities to open doors for Shimer.
 - Slate of informal programs and events continues to introduce new people/re-connect friends to Shimer College

Questions? Feedback?