



SouthWest Metro Educational

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**FOUNDATION**

# **Three Year Plan for 2016-2018**

## **Overview and Rationale**

The goals and strategies the SouthWest Metro Educational Foundation have adopted for the 2016-2018 plan emphasize our organizational strengths to continue our growth trajectory:

- Growth in Scholarships
- Growth in Sponsorships
- Growth in Mentor Program
- Growth in Foundation Infrastructure

Justification for these priorities is centered entirely on the population of students served by the SouthWest Metro Educational Cooperative. Students at SWMetro have encountered many barriers and obstacles and have found a place to thrive at the Co-op.

The majority of students would not be eligible to receive scholarships at the home districts, thus the importance of the foundation's scholarship program. Scholarships are provided to students going into a variety of professions that do not often require a 4 year college degree. Many of the scholarships provided are for trade schools and 2 year certifications.

Also, many of the students have felt outcast and at times bullied by other students in the former school setting, thus the importance of the foundation's sponsorship program. Sponsorships support activities within the Co-op to help bring students together, build community, as well as provide incentives to stay in school and actively participate.

For students going on to post-secondary education, many are the first in their family to attend college. Also, the barriers that students experience in grade and high school do not go away in a post-secondary setting and are less supported, thus the importance of the foundation's mentor program. Mentors provide much needed guidance and support to students navigating post-secondary education. Engaged mentors have provided significant support in helping students achieve their goals while dealing with ongoing barriers that could interfere with their ability to complete their education.

## **Vision and Mission**

The strategic plan is rooted in SouthWest Metro Educational Foundation's mission.

### **SouthWest Metro Educational Foundation Mission**

*To sustain and advance the unique and vital educational services and programs of SouthWest Metro Educational Cooperative--District 6088.*

*The SouthWest Metro Educational Foundation supports District 6088, where people register for opportunity and hope, not just receive an education. District 6088 supports over 10,000 people a year to overcome barriers and achieve a quality life through education.*

## **Strategic Priorities 2016-2018**

### **Growth in Scholarships**

*Continue to grow and increase the number of scholarships available each year to graduates of the SouthWest Metro Educational Cooperative.*

SouthWest Metro Educational Foundation will expand the scholarship program over the next three years by formalizing the scholarship solicitation process, identifying and cultivating scholarship donor prospects and continuing to fine tune the scholarship application and interview process.

Goals and Objectives for the next three years are as follows:

<b>GOALS:</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>
<b>Grow Scholarships</b>	\$12,000.00	\$15,000.00	\$18,000.00

In Year 1, staff will present formalized scholarship solicitation materials. Board/Committee and staff will identify 10 – 15 scholarship donor prospects and contact them. Board/Committee and staff will seek renewal scholarships from current scholarship donors. The timeline will begin in July with identification of prospects, then contact beginning in August/September, and confirmations no later than January. Staff and Board/Committee will also strategize scholarship awards breakfast celebration to include intentional donor grooming for new scholarships.

In Year 2, process will repeat with modifications from lessons learned in Year 1. In addition another 5 – 10 prospects will be identified.

In Year 3, process again will repeat with modification from lessons learned in Year 2. In addition another 5 – 10 prospects will be identified.

## **Growth in Sponsorships**

*Continue to grow sponsorships to address needs of the SouthWest Metro Educational Cooperative for items and activities not supported through other funding streams.*

SouthWest Metro Educational Foundation will expand the sponsorship program over the next three years by continuing support of current sponsored activities as well as supporting additional activities identified through ongoing communication with SouthWest Metro Educational Cooperative leadership and staff.

Goals and Objectives for the next three years are as follows:

<b>GOALS:</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>
<b>Grow Sponsored School Activities</b>			
Thanksgiving	\$350.00	\$375.00	\$400.00
Incentives	\$700.00	\$750.00	\$800.00
Kick Ball	\$350.00	\$375.00	\$400.00
Teacher Appreciation	\$350.00	\$375.00	\$400.00
Kick Off	\$500.00	\$750.00	\$1,000.00
Classroom Enhancements	\$2,000.00	\$2,500.00	\$3,000.00
Other - TBD	\$750.00	\$800.00	\$850.00
<b>TOTAL</b>	<b>\$5,000.00</b>	<b>\$5,925.00</b>	<b>\$6,850.00</b>

In Year 1, staff will present formalized sponsorship solicitation materials for soliciting sponsorship donors outside of the gala. Staff will also incorporate sponsorship opportunities during the Fund A Need at the Gala. Board/Committee and staff will identify 3 – 5 donor prospects for each activity and contact them. The timeline will begin in July with identification of prospects, then contact beginning in August/September, and confirmations no later than January. Also the Fund A Need will occur during the Gala in October. Staff and Board/Committee will also strategize marketing benefits to sponsorships as well as ways for sponsors to see Return on Investment (i.e. notes on Facebook or Twitter, attend Kick Ball Tournament, attend Thanksgiving Dinner, notes of thanks from students or teachers for incentives, etc.)

In Year 2, process will repeat with modifications from lessons learned in Year 1. In addition, renewal solicitation will occur early in fiscal year (if not at end of previous fiscal year) and another 1 – 2 prospects will be identified for each category as needed.

In Year 3, process again will repeat with modification from lessons learned in Year 2. In addition, renewal solicitation will occur early in fiscal year (if not at end of previous fiscal year) and another 1 – 2 prospects will be identified for each category as needed.

### **Growth in Mentor Program**

*Re-Establish Mentor Program and grow participation in the program by making it a vital and worthwhile experience for both mentors and mentees.*

SouthWest Metro Educational Foundation will re-establish and expand the mentor program over the next three years by formalizing the program with policies and procedures, cultivation of mentors, and recruitment of mentees.

Goals and Objectives for the next three years are as follows:

<b>GOALS:</b>	<b>Currently</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>
<b>Grow Mentor Program</b>		\$300.00	\$350.00	\$400.00

In Year 1, staff and Board/Committee will create mentor/mentee recruitment materials, program policies and procedures, mentor training materials, and events/social gatherings for mentor/mentee. Staff and Board/Committee will work with any 2015 scholarship recipient interested in being mentored and match them with a mentor and work with both parties as program items are being created. From July – December all materials will be created, in January mentor program will launch with the scholarship application being made available to students. Mentor program will be a question on the scholarship application as well as mentioned during the interview. Mentees will be solicited prior to the scholarship awards. Monetary goals noted above are to use for Mentor/Mentee gatherings, etc.

In Year 2, process will repeat with modifications from lessons learned in Year 1.

In Year 3, process again will repeat with modification from lessons learned in Year 2.

### **Growth in Infrastructure**

*Continue to improve and enhance infrastructure to meet the growth of the foundation and demonstrate solid viability of the organization.*

SouthWest Metro Educational Foundation will continue to improve and enhance its infrastructure to support organizational growth by creating policies and procedures for programs, activities, and operation of the foundation as a means of demonstrating business best practices. The goal in Year 3 is to apply for the Charities Review Council's "Meets Standards" Seal that motivates funders.

In addition, the board will establish committees that will help with the work of the foundation. Currently, the foundation has a contracted staff person at 14 hours per week. The board is a working board. Committees will help bring additional community members into the organization as a feeder to board recruitment. Committees will include: Scholarship, Gala, Mentoring, Nominating, Fundraising, and Executive.

### **Budgetary Support for Three Year Plan**

SouthWest Metro Educational Foundation has created budgets for each of the three years in this plan. The budget revenue include:

- Mild growth from the Gala revenue each year that supports the contracted staff position, several of the sponsorships, one scholarship and all other operating expenses.
- Growth in targeted scholarship donation solicitation as noted above.
- Growth in sponsorships from donors for a specific activity as noted above.
- Growth in general donations through solicitation during Give to the Max and a letter to those not attending the Gala.
- A fiscal agent fee to cover some administrative support.

The budget expenses include:

- Contracted Executive Director at same rate over three years.
- Renewed Insurance premiums for Directors and Officers and Liability.
- Printing, Postage, Office Supplies.
- Standard Gala Expenses with minor increases for inflation.
- Scholarship Awards Breakfast Expenses.
- Tax Filing and Legal Hotline Fees.

## **Proposed Budgets for Fiscal Year 2015/2016, 2016/2017, 2017/2018**

(Revisions for Year 2 and 3 will occur with lessons learned from previous fiscal year.)

<b>Revenue</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>
Gala Gross Raised	\$38,000.00	\$40,000.00	\$40,000.00
Scholarship Donations	\$12,000.00	\$15,000.00	\$18,000.00
Other Donations through board giving, direct mail, Give to the Max and solicitation for specific sponsored activities	\$3,500.00	\$5,000.00	\$7,000.00
Admin Fees for Fiscal Sponsorship	\$1,200.00	\$1,200.00	\$1,200.00
In-Kind Support from Co-op (Accounting, Finance, Office Space, etc.)			
<b>TOTAL</b>	<b>\$54,700.00</b>	<b>\$61,200.00</b>	<b>\$66,200.00</b>
<b>Expenses</b>			
Executive Director (Contracted at \$1920 per month but only billing \$1500)	\$18,000.00	\$18,000.00	\$18,000.00
Insurance D&O	\$900.00	\$900.00	\$900.00
Insurance Liability	\$860.00	\$860.00	\$860.00
Scholarships	\$12,000.00	\$15,000.00	\$18,000.00
Sponsorships	\$5,000.00	\$5,925.00	\$6,850.00
Mentor Program	\$300.00	\$350.00	\$400.00
Gala Expenses (Printing, Food, Auctioneer, Decorations, Etc.)	\$11,000.00	\$11,000.00	\$11,000.00
Scholarship Breakfast (Printing, Food, Etc.)	\$500.00	\$500.00	\$500.00
Office Supplies	\$1,000.00	\$1,000.00	\$1,000.00
Postage	\$750.00	\$1,000.00	\$1,000.00
Legal Hotline Advice	\$450.00	\$450.00	\$450.00
Constant Contact	\$180.00	\$420.00	\$420.00
Miscellaneous	\$500.00	\$500.00	\$500.00
<b>TOTAL</b>	<b>\$51,440.00</b>	<b>\$55,905.00</b>	<b>\$59,880.00</b>
<b>NET</b>	<b>\$3,260.00</b>	<b>\$5,295.00</b>	<b>\$6,320.00</b>