

SouthWest Metro
Educational Foundation



Strategic Plan 2016-2018

Year One Review And Year Two Plan

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 Year One and Year Two:

GOALS:	Projected Year 1	Actual Year 1	Projected Year 2
Grow Scholarships	\$12,000.00	\$12,500.00	\$15,000.00

YEAR ONE ACCOMPLISHMENTS – We exceeded our goal this year, with having 4 new scholarships! We welcomed the Prior Lake Lions Club, Jordaness Lions, SWMetro Faculty, SWMetro School Board, and Diane Grunewald Memorials Scholarships. Although we had an increase in the number of scholarships available, we only had 11 students eligible to receive them leaving, 3 scholarships set aside for use in 2017.

YEAR TWO PLAN – We will repeat the process and solicit new prospects to add an additional 3 scholarships. The committee will also look at increasing the amount of scholarship from \$1,000 to \$2,500, etc. We will also have a careful eye on the applicant pool and hoping to see an increase in the number of students applying for scholarships.

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 Year One and Year Two:

GOALS:	Projected Year 1	Actual Year 1	Projected Year 2
Grow Sponsored School Activities			
Thanksgiving	\$350.00	\$350.00	\$375.00
Incentives	\$700.00	\$350.00	\$750.00
Kick Ball	\$350.00	\$350.00	\$375.00
Teacher Appreciation	\$350.00	\$560.00	\$600.00

**SouthWest Metro Educational Foundation Three Year Plan – Year One Review
2016 - 2018**

Kick Off	\$500.00	\$500.00	\$750.00
Classroom Enhancements	\$2,000.00	\$1,500.00	\$2,500.00
Other - TBD	\$750.00		\$750.00
TOTAL	\$5,000.00	\$3,610.00	\$6,100.00

YEAR ONE ACCOMPLISHMENTS – We made progress in this area largely with the support of the faculty fund raising just over \$4,000 through payroll deduction from the SWMetro Co-op staff. We will continue to increase support from staff in Year 2 using the increase in giving in sponsorships as an incentive. We sent proposals to the civic groups in Scott and Carver counties that offered supporting our sponsorship program. The result of the mailing was 2 new scholarships. We will expand the prospect list in Year 2. The emphasis is to continue to increase this area following our strategic plan for Year 2 and Year 3.

YEAR TWO PLAN - In Year 2, the process will repeat with modifications from lessons learned in Year 1. In addition, renewal solicitation will occur at the Annual Meeting prior to the start of the new fiscal year. We will build on the sponsorship solicitation materials for soliciting sponsorship donors outside of the gala. Staff and Board/Committee will continue to 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.)

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 Year One and Year Two:

GOALS:	Projected Year 1	Actual Year 1	Projected Year 2
Grow Mentor Program	\$300.00	\$0.00	\$350.00

YEAR ONE ACCOMPLISHMENTS – We formed a Mentorship Committee and included the interest in having a mentor onto the Scholarship Application. Every applicant indicated an interest in having a mentor. Although formed, the committee has yet to meet to really launch the program. That will be the immediate emphasis in Year 2, especially to connect the new scholarship recipients with mentors.

YEAR TWO PLAN – The Mentorship 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 the 2016 scholarship recipients interested in being mentored and match them with a mentor and work with both parties as program items are being created. For the 2017 Scholarship Recipients, Mentees will be solicited prior to the scholarship awards. Monetary goals noted above are to use for Mentor/Mentee gatherings, etc.

Growth in Infrastructure

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

YEAR ONE ACCOMPLISHMENTS – The Executive Committee met regularly throughout the year and worked on new policies and by-law revisions in preparation to apply for the Charities Review Council’s “Meets the Standards” Seal. Policies created and approved include Whistleblower, Conflict of Interest, and Privacy Policy. In addition, a bylaws revision was discussed including modifications to term limits, board membership, quorum requirements and introducing Emeritus Board Members. In addition, following the bylaws the June Board Meeting will be considered the Annual Meeting per the requirements. At our June Board Meeting in 2016, the bylaw revisions will be approved along with the slate of Board Officers and Emeritus Members. The board also established committees including, Executive, Nominating, Gala/Fundraising, Scholarship and Mentorship. Nearly all the committees are up and running with regular meetings.

YEAR TWO PLAN – Continue with adopting policies and procedures that are required to have the “Meets the Standards”: Seal and have all the committees up and running and meeting regularly.

Year One Budget Comparison and Proposed for Year Two
Actuals for Year One will be available at July Board Meeting after Fiscal
Year is Complete

Revenue	Actual Year 1	Budget Year 1	Budget Year 2
Gala Gross Raised		\$38,000.00	\$40,000.00
Scholarship Donations		\$12,000.00	\$15,000.00
Other Donations through board giving, direct mail, Give to the Max and solicitation for specific sponsored activities		\$3,500.00	\$5,000.00
Admin Fees for Fiscal Sponsorship		\$1,200.00	\$1,200.00
In-Kind Support from Co-op (Accounting, Finance, Office Space, etc.)			
TOTAL		\$54,700.00	\$61,200.00
Expenses			
Executive Director (Contracted at \$1920 per month but only billing \$1500)		\$18,000.00	\$18,000.00
Insurance D&O		\$900.00	\$900.00
Insurance Liability		\$860.00	\$860.00
Scholarships		\$12,000.00	\$15,000.00
Sponsorships		\$5,000.00	\$5,925.00
Mentor Program		\$300.00	\$350.00
Gala Expenses (Printing, Food, Auctioneer, Decorations, Etc.)		\$11,000.00	\$11,000.00
Scholarship Breakfast (Printing, Food, Etc.)		\$500.00	\$600.00
Office Supplies		\$1,000.00	\$1,000.00
Postage		\$750.00	\$1,000.00
Legal Hotline Advice		\$450.00	
Donor Database Cloud			\$1,500.00
Constant Contact		\$180.00	\$420.00
Miscellaneous		\$500.00	\$500.00
TOTAL		\$51,440.00	\$57,055.00
NET		\$3,260.00	\$4,145.00