



Adams 50 Foundation

3 Year Strategic Plan

Created on 11/14/09

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Trends in Educational Foundations

Questions to answer from our trends analysis when creating our vision and strategic directions:

1. How do we partner with other causes to make us more attractive outside the community?
2. How do we balance the human service needs with educational needs? There are a wide range of needs.
3. There is a lot of competition for dollars – how do we put money into successful organizations and projects and one's that pull at your heart?
4. How do we become more innovative at raising money?

Practical Vision Focus Question:

What do we want to see in place in 3 years for us to be operating at a higher level?

**Practical Vision - Workshop Question:
What do we want to see in place in 3 years for us to be operating at a higher level.**

| Establish a Diversified Development Plan | Expand & Diversity the Board | Develop & Retain Donors | Develop a brand & increase awareness of our Foundation |
|---|---|--|---|
| <ul style="list-style-type: none"> • Diversified Funding source planned giving • Seek new business revenues • Diversify funding source private foundation • Diversity funding through major gifts • Integration of Foundations in our community • Stabilized income stream • Governance structure change \$250,000 per year • \$3 million endowment • Capital/endowment campaign | <ul style="list-style-type: none"> • More parental involvement on this Board • Increasing Board size • Potential Board members come to us • Diverse Board that represents our community • Tap the 20/30 age group • More alumni on the board • Governance structure change - \$250,000 | <ul style="list-style-type: none"> • Double our donations • Celebrate increased local business giving • More major donors • Donors come to us versus we go to them | <ul style="list-style-type: none"> • Have same awareness level as DPS and Jeffco Foundations • Increase community participation at the grassroots level • Online community • Increased recognition “everybody knows our name” |

Practical Vision - Workshop Question:

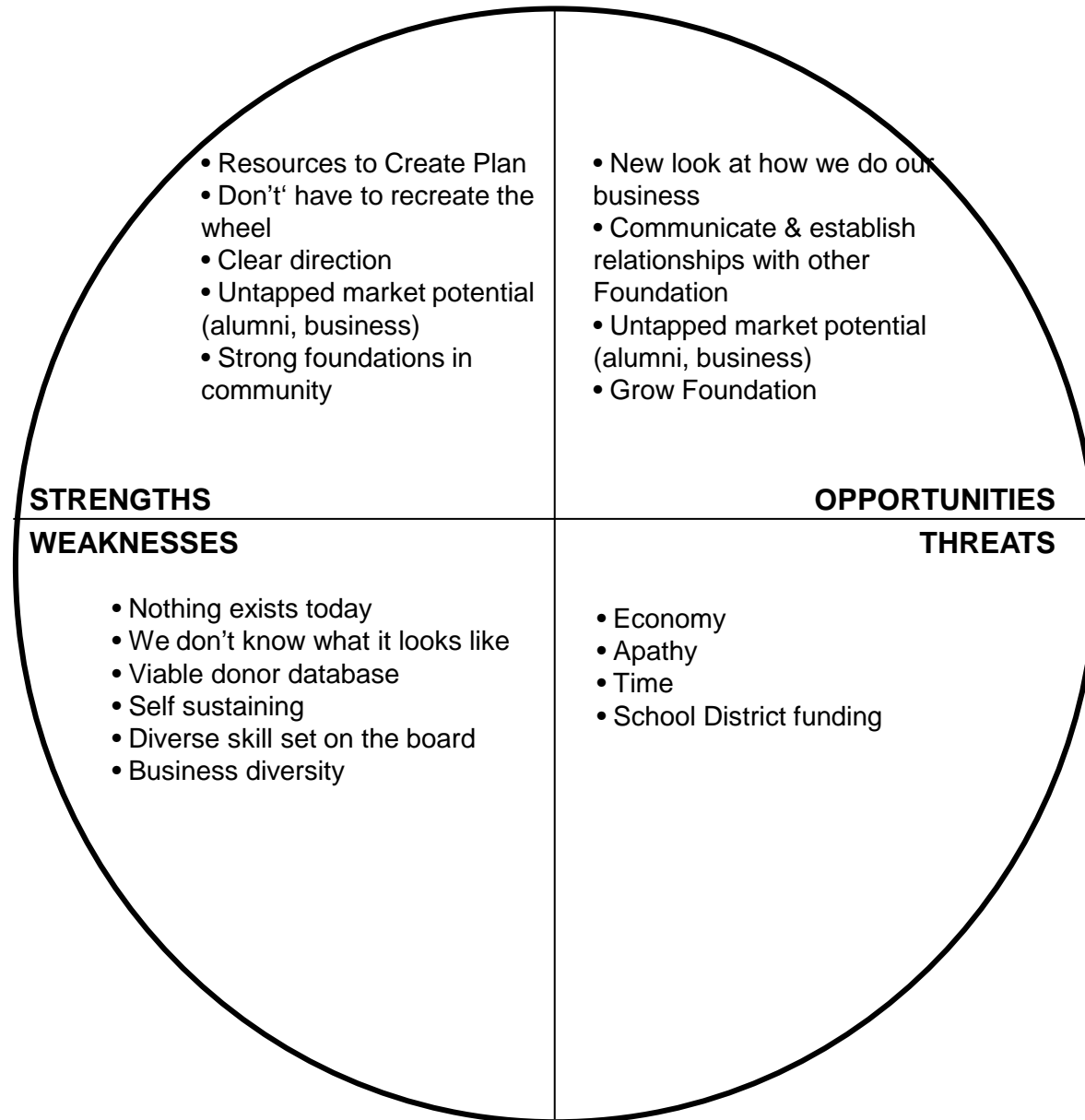
What do we want to see in place in 3 years for us to be operating at a higher level.

| Develop and Alumni community | Expand Giving Programs & Benefits | Develop a Self Supporting Community | Become and Innovative Foundation |
|--|---|---|--|
| <ul style="list-style-type: none"> • Alumni proud to support Foundation • Alumni donations at \$100,000 • Alumni Center that has chapters across the nation • Self supporting Alumni Association | <ul style="list-style-type: none"> • Increased number and levels of scholarships • Increase in the Benevolent Fund • Employee Scholarship increases • Gave \$100,000 in Creativity Grants | <ul style="list-style-type: none"> • 1st year fully independent of District \$ • 2 Additional staff people • Self supporting Foundation | <ul style="list-style-type: none"> • New main exciting fundraiser • Online community • Foundation known for innovation in fundraising |

SWOT

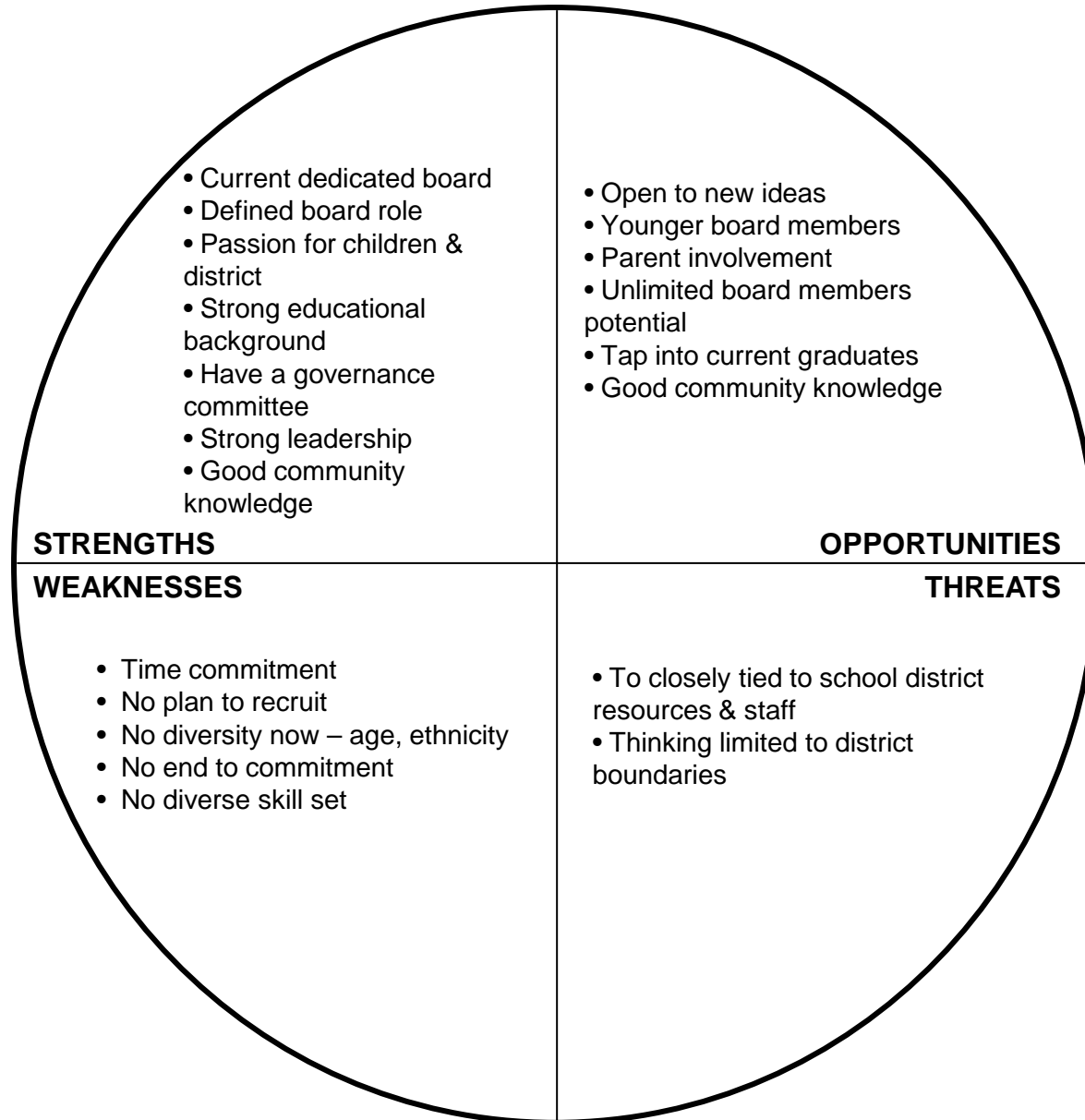
Vision Component

Establish a diversified development plan; retain donors; self supporting Foundation



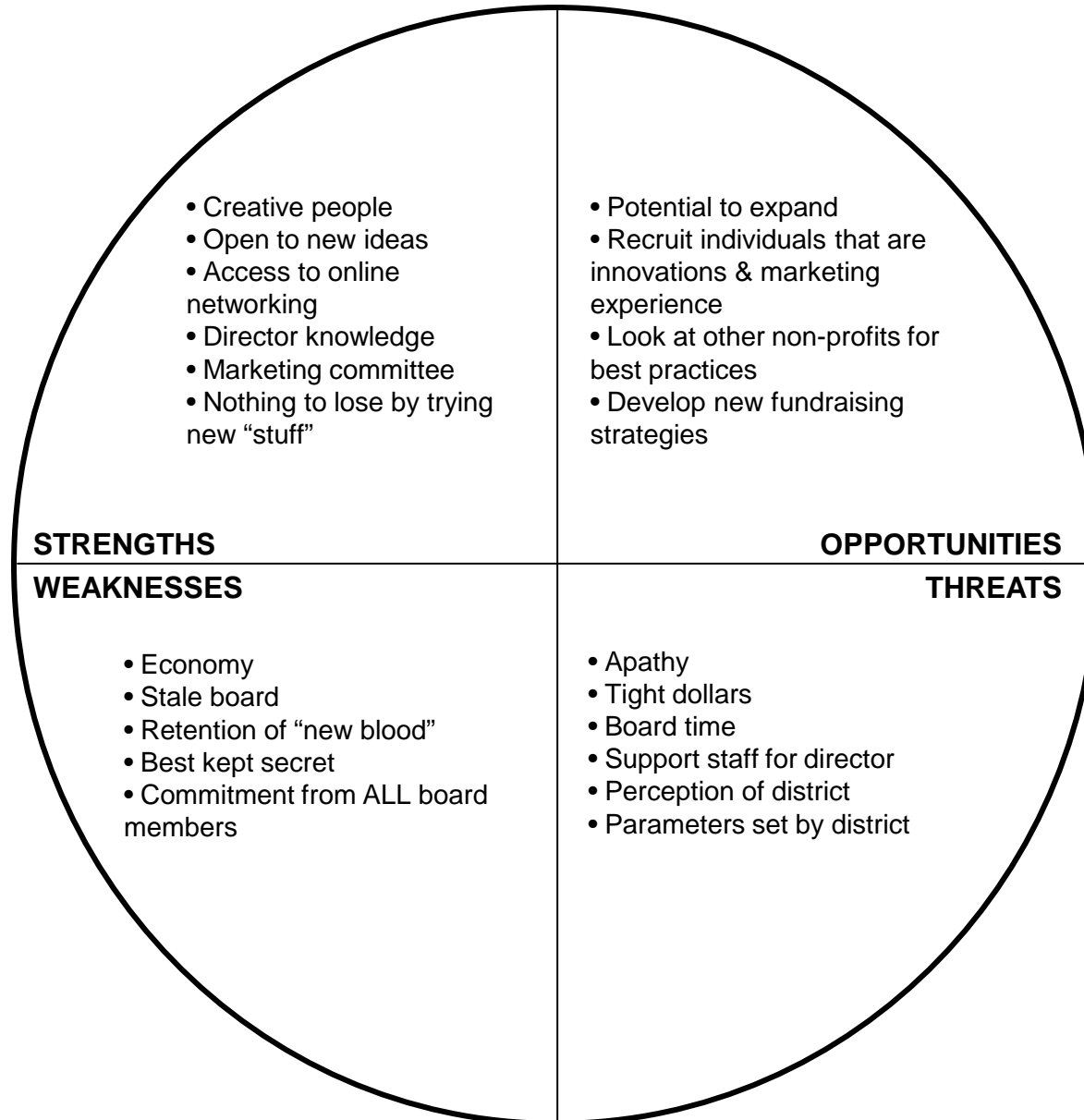
SWOT

Vision Component **Expand and Diversity the Board**



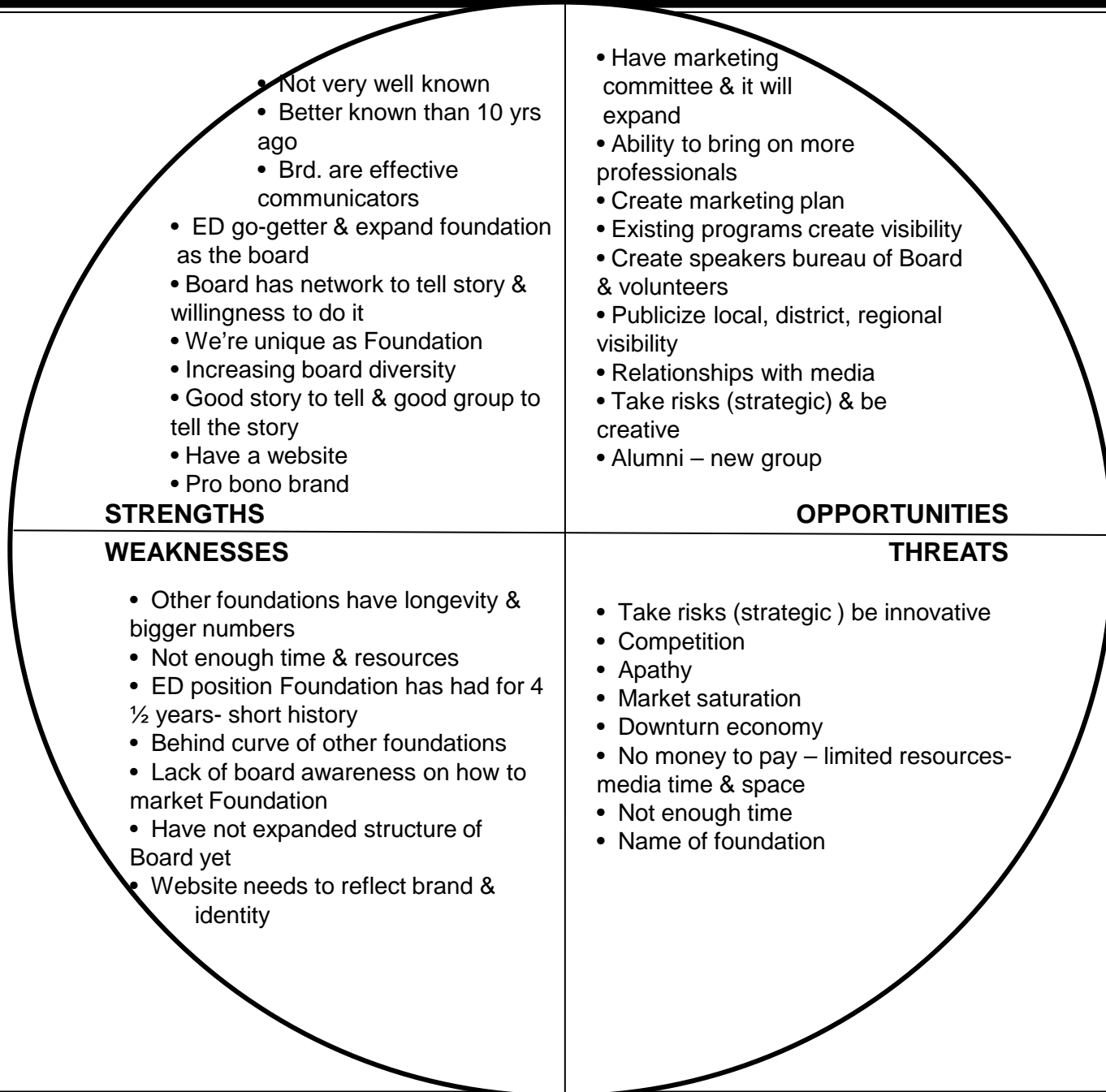
SWOT

Vision Component **Become an Innovative Foundation**



SWOT

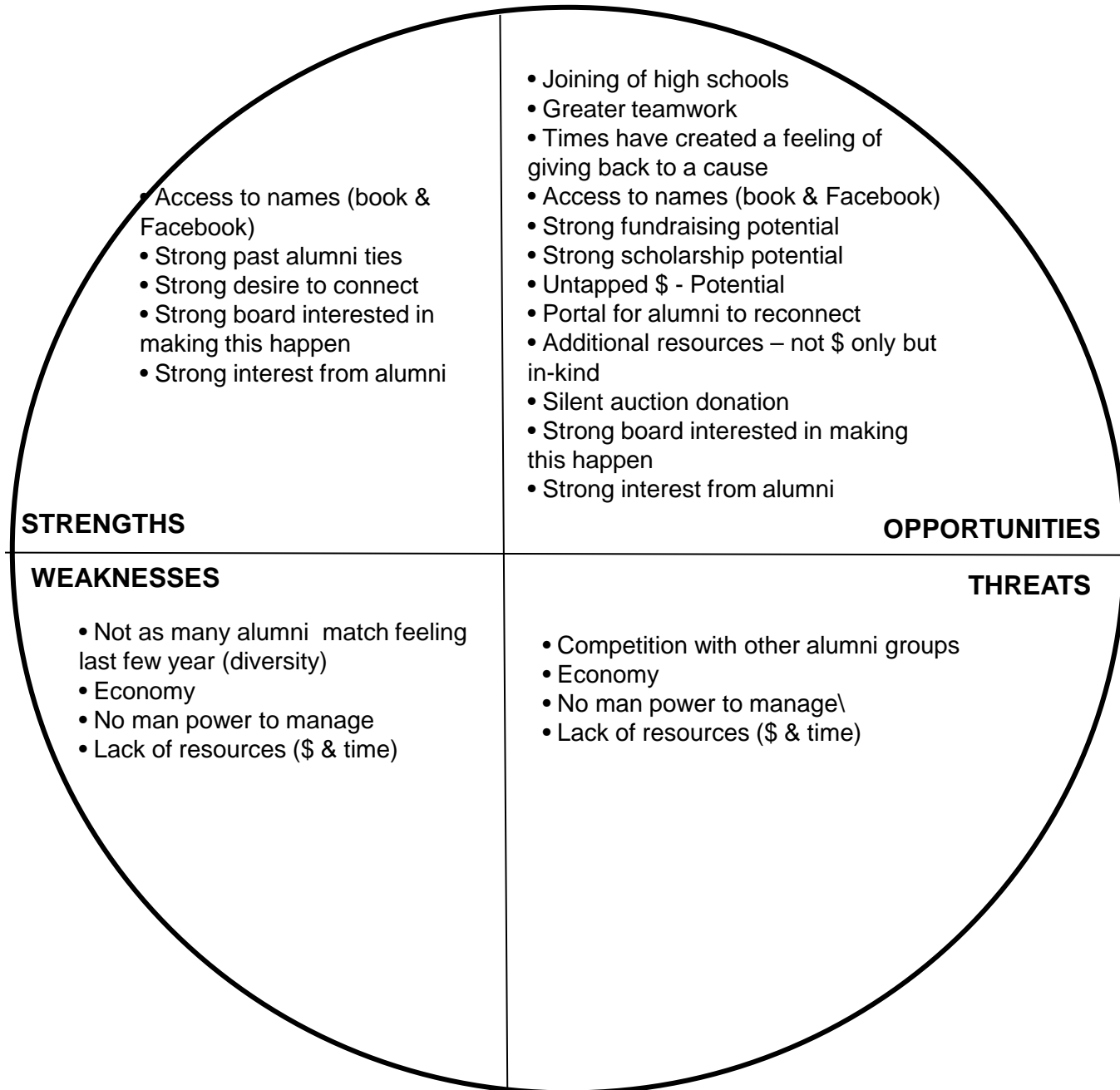
Vision Component **Develop a Brand and Increase Awareness of Foundation**



SWOT

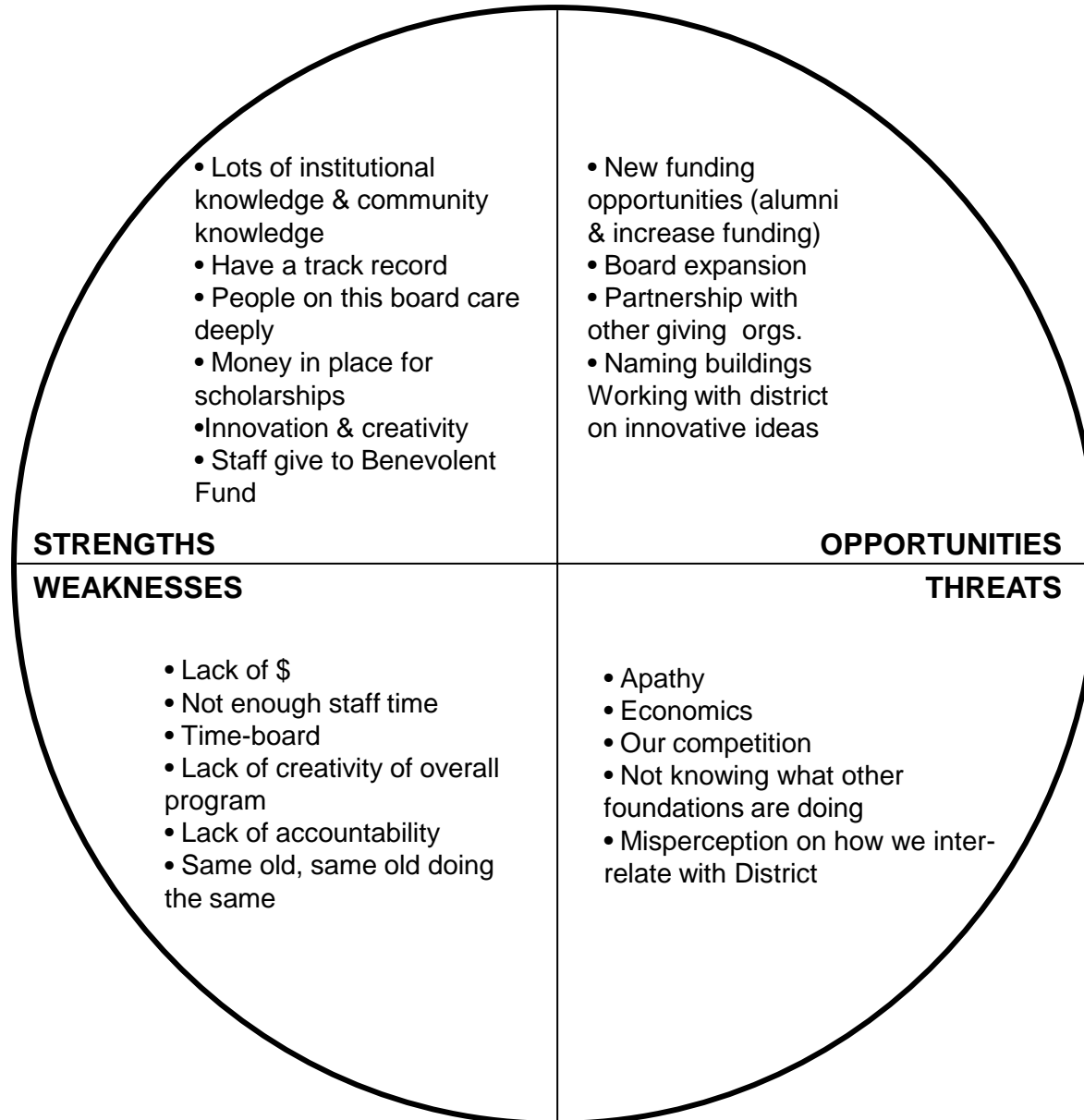
Vision Component

Develop an Alumni Community



SWOT

Vision Component **Expand Giving Programs & Benefits**



Strategic Directions – 1st Year Quarterly Brainstorming:

| Strategic Direction 1 Creating & Implementing a Development Plan | Strategic Direction 2 Expanding Board Governance | Strategic Direction 3 Creating & Implementing a Marketing Plan | Strategic Direction 4 Engaging Alumni |
|---|---|--|---|
| <ul style="list-style-type: none"> • Do an overall analysis of various foundations • Who they are • Their focus • Governing structure • Budgets • Best practices & fundraising efforts • Develop & finalize a 3-year budget • Foundation will agree on overall goals (2nd Qrt) • Start initiatives (3rd Qrt) • Create an integration model (4th Qrt) | <ul style="list-style-type: none"> • Create target Board size • Create a recruitment plan that outlines skills, age, diversity with a 2-year commitment minimum (2nd Qrt) • Increase Committee participation from other areas – community & outside district (3rd Qrt) • Evaluate board structure – levels (4th Qrt) | <ul style="list-style-type: none"> • Create a marketing plan (support development plan) (2nd Qrt) • Create speakers bureau/message (March) • Expand media relationships & community 8 in year (4th Qrt) • Pro bono brand development (Jan)(4th Qrt) | <ul style="list-style-type: none"> • Identify sources of alumni info. • Contact/direct mailing to alumni to tell goal & what we're doing (Ranum/Westy merge; Ranum & west FB pages; school newsletters @ all levels with email contacts; 50's News Flash, FB, Twitter; & reunion unlimited having alumni share info w/ Foundation (2nd Qrt) • Enlist interns from colleges & univer. To help organize alumns (3rd Qrt) • Engage alums in creating the Alumni Center (4th Qrt) • Explore ways to store database-disks, CDs, eventual database • Budget to implement program • Get Bob Briggs to chair this Committee • Linda Cherrington to be on committee |


1st Year Accomplishments Strategic Directions by Quarter

| | |
|---|---|
| <p style="text-align: center;">First Quarter 2010</p> <ul style="list-style-type: none"> • Do an overall analysis of various foundations (1) • Who they are (1) • Their focus (1) • Governing structure (1) • Budgets (1) • Best practices & fundraising efforts (1) • Create target Board size (2) • Create speakers bureau/message (3) • Get Bob Briggs to chair this Committee (4) • Linda Cherrington to be on committee (4) | <p style="text-align: center;">Second Quarter</p> <ul style="list-style-type: none"> • Foundation will agree on overall development goals (1) • Create a recruitment plan that outlines skills, age, diversity with a 2-year commitment minimum (2) • Create a marketing plan (support development plan) (2) • Identify sources of alumni info. (4) • Contact/direct mailing to alumni to tell goal & what we're doing (Ranum/Westy merge; Ranum & west FB pages; school newsletters @ all levels with email contacts; 50's News Flash, FB, Twitter; & reunion unlimited having alumni share info w/ Foundation (4) |
| <p style="text-align: center;">Third Quarter</p> <ul style="list-style-type: none"> • Start initiatives (1) • Develop & finalize a 3-year budget (1) • Increase Committee participation from other areas – community & outside district (2) • Enlist interns from colleges & universities To help organize alumni (4) • Explore ways to store database- disks, CDs, eventual database (4) | <p style="text-align: center;">Fourth Quarter</p> <ul style="list-style-type: none"> • Create a development integration model (1) • Evaluate board structure – levels (2) • Expand media relationships and community 8 in year (3) • Pro bono brand development (3) • Engage alums in creating the Alumni Center (4) • Budget to implement program (4) |


(strategic direction)

1st 90-Day Implementation Steps
January 1, 2010 -
March 31, 2010


90 Day Implementation Steps 1ST STRATEGIC DIRECTION

| | | |
|--|---|--|
|  <p style="text-align: center;">Creating & Implementing a Development Plan</p> <p style="text-align: center;">STRATEGIC DIRECTION</p> | <p>ACCOMPLISHMENT</p> <p>Set a 3 Year Budget</p> | <p>WHY IS THIS IMPORTANT:</p> <p>So we know what we are working towards</p> |
| <p>Start Date: Jan 1, 2010</p> | | <p>End Date: 3/31/2010</p> |
| <p>Implementation: (How):</p> | <p>Who</p> | <p>By When</p> |
| <ol style="list-style-type: none"> 1. Determine Resources Available 2. Develop a Budget <ol style="list-style-type: none"> 1. Review year 4/10-3/11 budget (year one) 3. Develop Year “2” & year “3” budget (total board input) 4. Board approval of 3-year budget | <p>Names</p> <p>Matt Duran</p> <p>Matt Duran (Branda Abbott)</p> <p>Marilyn Getsch</p> <p>Marilyn Flachman</p> | <p>Dates</p> <p>February</p> <p>February</p> <p>March</p> <p>March</p> |
| <p>Team Lead Matt Duran</p> | <p>Team Members Matt D, Marilyn G, Marilyn F. Tom L.</p> | <p>16</p> |

90 Day Implementation Steps 2nd STRATEGIC DIRECTION


| | | |
|--|--|--|
|  <p>Expanding Board Governance</p> <p>STRATEGIC DIRECTION</p> | <p>ACCOMPLISHMENT</p> <p>Create Target Board Size</p> | <p>WHY IS THIS IMPORTANT:</p> <p>Board Efficiency</p> |
| <p>Start Date: January 1, 2010</p> | | <p>End Date: 3/31/10</p> |
| <p>Implementation: (How):</p> | <p>Who</p> | <p>By When</p> |
| <ol style="list-style-type: none"> 1. Research sizes of effective Boards 2. Set criteria for what an effect board is: <ol style="list-style-type: none"> 1. Ascertain current size & active members 3. Recommend to Board – a size requirement 4. Seek approval from Board | <p>Names</p> <p>Branda Abbot & John Stipech BA & JS</p> <p>BA & JS</p> <p>BA & JS</p> | <p>Dates</p> <p>January</p> <p>February</p> <p>March</p> <p>March</p> |
| <p>Team Lead Branda Abbott</p> | <p>Team Members</p> <p>Branda & John</p> | <p>17</p> |

90 Day Implementation Steps 3rd STRATEGIC DIRECTION

| | | |
|--|---|--|
|  <p style="text-align: center;">Creating & Implementing a Marketing Plan</p> <p style="text-align: center;">STRATEGIC DIRECTION</p> | <p>ACCOMPLISHMENT</p> <p>Create a Speakers Bureau</p> | <p>WHY IS THIS IMPORTANT:</p> <p>Tell our story</p> |
| <p>Start Date: January 1, 2010</p> | | <p>End Date: 3/31/10</p> |
| <p>Implementation: (How):</p> | <p>Who</p> | <p>By When</p> |
| <ul style="list-style-type: none"> 1. Develop the message <ul style="list-style-type: none"> 1. Elevator Speech 2. Service group/individuals schools/buildings 3. Corporate 2. Redesign of Marketing Brochure 3. Develop video story presentation 4. Develop list of speakers <ul style="list-style-type: none"> 1. Speaker Training | <p>Names</p> <p>Tom Lynch</p> <p>Don S.</p> <p>Don S. & Pat K.</p> <p>Tom</p> <p>Tom</p> | <p>Dates</p> <p>January</p> <p>3rd Qtr.</p> <p>March</p> <p>January</p> <p>3rd Qtr.</p> |
| <p>Team Lead</p> <p style="padding-left: 40px;">Tom Lynch</p> | <p>Team Members</p> <p style="padding-left: 40px;">Pat Kelly, Don Schlaht</p> | <p>18</p> |

90 Day Implementation Steps

4th STRATEGIC DIRECTION

| | | |
|---|---|--|
|  <p style="font-size: 1.2em; font-weight: bold;">Engaging Alumni</p> <p style="font-size: 1.2em; font-weight: bold;">STRATEGIC DIRECTION</p> | <p style="font-size: 1.2em; font-weight: bold;">ACCOMPLISHMENT</p> <p>Establish a Committee</p> | <p style="font-size: 1.2em; font-weight: bold;">WHY IS THIS IMPORTANT:</p> <p>Find data & get Committee together to explore creating an Alumni Center through the Foundation</p> |
| <p>Start Date: January 1, 2010</p> | | <p>End Date: 3/31/10</p> |
| Implementation: (How): | Who | By When |
| <ol style="list-style-type: none"> 1. Call Bob Briggs; Linda Cherrington; and Cheryl Osborne 2. Set 1st Committee mtg. Date 3. Create a Facebook page for Foundation <ol style="list-style-type: none"> 1. Create a message for the page 2. Send friends request to alumni 4. Submit article for all school newsletters ask it be included on District & school websites 5. News release to the Window | <p style="font-weight: bold;">Names</p> <p>Chris Dittman</p> <p>Chris Dittman</p> <p>Christy Committee Chris D.</p> <p>Katie Ryan</p> <p>Katie Ryan</p> | <p style="font-weight: bold;">Dates</p> <p>January</p> <p>January</p> <p>February</p> <p>March</p> <p>March</p> |
| <p>Team Lead Chris Dittman</p> | <p style="font-weight: bold;">Team Members</p> <p>Chris D, Christy D, Katie Ryan</p> | <p style="font-size: 1.5em; font-weight: bold;">19</p> |

Next Steps

- Document strategic plan and send out for review before finalizing
- Get all board members who weren't able to attend up to speed on the strategic plan, share the documentation, and engage them in one of the committees
- At each board meeting report progress, delays, or challenges with each strategic direction's 90 day implementation plan
- Every 90 days create a new 90 day implementation plan for each strategic direction based on the 1st year accomplishments