



**GOAL**

**\$25,000,000 in asset under management**

**Stretch Goal: \$30,000,000 in assets under management**

**Completion Date**

December 31, 2020

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Introduction

Central Kansas Community Foundation is in a unique position to identify with and serve donors in our central Kansas service area as a host-affiliate foundation model. CKCF leadership is redefining its role in the host/affiliate relationship and embracing their position as leaders, educators and strategists. As a host organization, CKCF is positioned to support affiliate foundations in asset-based development, define their donor base and assist in developing industry relevant fundraising and messaging strategies that will facilitate growth in assets under management - system-wide.

Various strategies and tactics will be outlined in the following development plan. This plan is designed to span a three-year timeframe. However, measurements for success will be identified for each year. The first year will consist primarily of defining the stakeholder base and transitioning messaging and outreach strategies – creating a solid foundation for successful development. We envision the second year will feature a more targeted outreach to a segmented donor base. Depending on our level of success, the second and third year will feature a more refined plan.

Engagement with high visibility in the community, led by the board of directors and staff is paramount to optimum success with this development plan. The Central Kansas Community Foundation activated Goal (#2), Stewardship and Communications Committee, designed for **Stewarding Donors** for the CKCF and their affiliates. The board of directors, staff, committee members and a volunteer base shall serve as advocates of the CKCF brand and will be responsible for implementing the tactics set forth in this plan.

### **Target Goal**

**Increase asset base by 5% by December 31, 2018 and annually thereafter; reaching 30M+ by 2020.**

### **Strategy 1**

#### **Develop a Donor Database**

**Tactic 1** Assess, identify, segment and define CKCF system-wide donor base.

**Tactic 2** Complete a survey among our system-wide donor base to determine how effective we are at stewarding our donors.

**Tactic 3** With identification of donors, communicate specific tailored messages for existing donor base in specific areas.

### **Strategy 2**

#### **Identify and develop a strategy to engage strategic partners**

**Tactic 1** Identify strategic partner targets for communications.

### **Strategy 3**

#### **Implement a regional foundation outreach and development program**

**Tactic 1** Survey affiliate staff/volunteers to identifying a benchmark for their current outreach efforts, along with their comfort level in asset-based development.

**Tactic 2** Create outreach and development strategies for each affiliate based on need.

**Tactic 3** Provide affiliate foundations and CKCF board of directors with development-specific education.

**Tactic 4** Set yearly asset-based development goals as a region.

### **Strategy 4**

#### **CKCF will develop a specific strategic messaging and outreach plan in support of our service region**

**Tactic 1** Identify appropriate messaging.

**Tactic 2** Provide easy to access outreach and asset development materials for use by affiliates.

**Tactic 3** Create a format for social message distribution for CKCF with direction for affiliate dissemination

### **Strategy 5**

#### **Monitor investments and manage growth in the funds**

**Tactic 1** Set yearly asset-based development goals beginning with 5% increase.

**Tactic 2** Provide fiduciary oversight to the funds under management, providing prudent stewardship of donor dollars.

**Strategy 1**  
**Develop a donor database**

There is currently a need for an investment in a system-wide donor database that makes sense for successful development. This database will help us identify individuals as core donors (those most committed to the CKCF mission, or the depth) or periphery donors (the breadth, those increasing their awareness of the mission). We can define these groups even further, identifying their basic attributes. For example: 1) Giving History Greater than 3 years, 2) Annual Gifts of \$5,000 or greater and/or 3) Exploration of or completion of Estate Plan for those who are periphery donors and identifying the deepest giving conditions that drive our core donors. We have identified the best-result for implementation of this strategy is to create a partialized donor tracking system allowing for an individual database for each affiliate organization as well as the host, CKCF. To optimize the creation of a functional system, this task needs to be completed in close coordination with each affiliate group, either through their volunteer board or staff.

**Tactic 1**

Assess, Identify, segment and define CKCF system-wide donor base system and content

- Audit current donor contact information and giving history data.
- Assemble donor contact information for outreach by mail, phone and email.
- Identify donor segments (core and periphery) for both the host and affiliate foundations.
  - Define core donors as individuals – develop a spreadsheet with a list of core donors and research their current giving both inside and outside the organization, where they live, their careers, their motivations, their preferred methods of communicating.
  - Define periphery donors as individuals as well as in groups – identify their basic income level, age, where they live, what groups and activities they are involved with, their preferred methods of communicating, in a general sense.

**Tactic 2**

Complete a survey which may include some in-person data collection, among our system-wide donor base to determine how effective we are at stewarding our donors.

To establish a gauge of satisfaction with our communications and outreach efforts the survey will guide donors to speak to their interests, disinterests, motivations and aspirations. In addition, the survey will help us determine levels of satisfaction with our thank you process and recognition programs. The survey would aid us in learning about donor drift and dissolution. Further clarity on the Foundation as a relevant organization, a reputable entity and whether or not the foundation is the first thought for charitable considerations. There are many additional qualitative attributes for which we can survey, but this provides a basis for consideration.

- Review national trends to determine base expectation for donors giving to charity.

- Review our system-wide trends to learn more about our current donors and the identifiable components of giving to and through the foundation.
- Review national/state/county giving trends and transfer of wealth statistics to identify available wealth and potential giving potential to cause trends that are relevant in our communities.

### **Tactic 3**

With identification of donors, communicate specific tailored messages for existing donor base in specific areas – legacy gifts on records, donor advised funds, agency fund board membership, etc.

- Improve thank you process – quicker turn around and more personalized approached. Engage board in this process at CKCF and Affiliate levels.
- Demonstrate movement in contributions from donors through giving spectrum/pyramid.
- Communications with specified groups of existing core donors (those already with funds).
  - Segmented Mailings
    - Agencies (Fall 2017)
    - DAF (March 2018)
    - Testamentary Funds (April 2018)
    - Continue to build out targeted donor communications
  - Identify donor patterns with AFP multi-year giving system
  - Pursue opportunities to engage in board, review teams and grant award ceremonies
  - Introduce a telephone thank you campaign for gifts \$5,000 and above, staff and board
  - Monthly identify contacts for donor stewardship – at least 2 key contacts per month
- Communications with existing periphery donors (those who have made gift(s) but not yet engage).
  - Incorporate into mailing list
  - Introduce those with email to newsletter
  - Provide thank you messaging not only for gift but also as part of building the foundation, maybe in Thanksgiving/Fall messaging outreach
  - Pursue opportunities to engage in board, review teams and grant award ceremonies
  - Pursue opportunities to hold 1:1 for telling foundation story and learning more about causes that matter to them, bridging other ways of giving – now or later.

### **Evaluation Measurement**

We will be successful if we have:

- Assess and update current donor/partner entries for accuracy by May 31, 2018.
- Finalize development of a functional donor database for the CKCF host with the partialized features for each affiliate foundation by July 2018.
- The completion of the donor-base survey, including analysis of survey results by December 2018. 2018 results serving then as a benchmark for the results of the same survey December 2020, from which we anticipate improvements in areas of donor information management, utilization of whole and partial segments of database for stewardship, identification of goals for building out donor contact database for manageability and effective utilization.

CKCF Developed in Cooperation with Ashley Bridgeman  
*the bridgeman group*, 2018

CKCF Board Approved, April 23, 2018

- Letter outreach mailings are achieved in timelines outlined.
- Engage at least 2 donors per month to move along paradigm of giving; result in an increase in # of gifts from 1,756 in 2016, 1,823 in 2017 to 1,878 in 2018 (3% increase); Alternatively measure # of overall contributions \$2,499,107 in 2016, \$1,463,322 in 2017 and 5% goal for 2018 of \$1,575,000.
- Attempt to double # of \$5,000 and larger gifts annually securing informal multi-year commitments
- Add 2 new agency endowments per year.
- Establish a minimum of 3 new DAF's annual.
- Increase % of board members as donors with established funds.

**Strategy 2**  
**Identify and develop a strategy to engage strategic partners**

Strategic partners, such as nonprofit boards of directors, funeral home directors, school districts, faith institutions, the business sector, government partners, bankers and financial advisors provide avenues for communicating with potential donors.

**Tactic 1**  
**Identify strategic partner targets in Newton and affiliate communities.**

- Request initial lists of partners from affiliates for incorporation into database and maintain
- Evaluate database system for all types of partners to allow query exports
- Develop targeted outreach communications for at least 3 partner groups annually (i.e. businesses, financial advisors, government leaders)
- Track gifts that come in due to outreach to partners

**Tactic 2**  
**Build on a feature in contact database for tracking type of partner for ease in exporting contact lists.**

- Continue clean-up of existing database management entries, connecting contact to specific identifier fields that will allow query exports for specific contact lists
- Provide affiliates with a spreadsheet for collecting contact information data for ability to be integrated into the main database system.
- Collect contact information at all speaking engagements and gatherings attended to identify partner contact information

**Tactic 3**  
**Develop outreach communication strategies for such partners as an external component of the development plan (see strategy 3)**

See Strategy 3 to incorporate specific communication approaches with partners

**Measurement**

We will be successful if we have:

- By July 2018 contacts in current database to be reviewed and connected to identifier fields.
- Further development of a functional strategic partner database for CKCF with ability to partialize for each affiliate within partner group identifiers, like churches, bankers; by end of 2018.
- Demonstrate stewardship of strategic partners by incorporating at least 3 special campaign approaches delivered annually (letter, packet drop off, email blast, educational training, etc.)
- Creation of messaging for incorporation in our social media outlets that highlights our outreach to targeted partner groups (maybe FB post at a partners' office showing dropping off Wills Guides, etc.).
- Confirm that at least 4 estate plan or memorial gift referrals having materialized from a strategic partners annually by December 2019.

### Strategy 3

#### Implement a foundation service area outreach and development program

Fact: System-wide volunteers are excited about the CKCF mission. Currently, affiliate Foundations are developing their asset bases through fundraising activities more so than through development activities. A challenge this creates is in moving donors from periphery donors to core donors and solidifying commitments to lifelong giving through estate plans or large endowed gifts. Our hypothesis about what is stopping our foundations from making the connection, is a lack of education, confidence and strategic direction. We are committed to a more formalized outreach development strategy.

#### Tactic 1

Survey affiliate staff/volunteers to identifying a benchmark for their current outreach efforts, along with their comfort level in asset-based development.

- By July 2018 review similar surveys conducted in the foundation field.
- Create the survey questions and build the survey tool by October 2018 for clarity on purposefulness of questions and responses we are seeking.
- Conduct the survey in early December 2018. Results will help to identify gaps and guide the educational curriculum creation and strategic planning for each affiliate. The survey will then again be conducted in December 2019 to determine success in education connection and strategic direction alignment per affiliate.

#### Tactic 2

Create outreach and development strategies for each affiliate based on local board motivation or immediate calls to action by community at large.

Successful outreach, communication and development strategies can be created once a solid understanding of our donor base is determined and the strengths and weaknesses of the local boards. The outreach communications and materials will be donor-centric. Thus, the tactics will employ our segmented/partialized donor and partner databases along with partner and donor information to implement tactics that keep in mind the market's gift potential and return on investment.

- CKCF staff will facilitate a planning session with each interested affiliate foundation to create an achievable plan for asset-based development, including a one-three year timeline. These plans will likely include tactics such as a donor thank you and recognition process, mailings, soft touches such as phone calls, FB posts, donor appreciation gatherings, award ceremony, press releases, estate planning seminar (yearly or every 2 years), host charity grant writing training, charity board presentations, community presentations, and more depending on the needs of the community and age of the Foundation.
- Create a communication strategy that supports development in each community based on the demographic and other descriptive statistics of segmented, targeted groups within that community, including results from donor and partner surveys, yet not limited to.
- CKCF staff will provide support and access to materials for use by the affiliate foundations to help them accomplish their goals.

### **Tactic 3**

Provide affiliate foundations and CKCF board of directors with development-specific education

- Focus the affiliate summit on asset-based fund development in 2018 and 2019.
- Direct affiliates to sign up and read segments from Crescendo Newsletters.
- Provide a small educational component during each affiliate meeting regarding development beginning July 2018.
- Make informational materials available regarding donor stewardship and asset development for affiliates on the CKCF website.
- Encourage boards incorporating the CF Express Training videos into their board meetings, plus available individually. Staff are encouraged with support of affiliate boards to become certified through the CF Express Training Module. A \$150 per person investment for staff or board members.

### **Tactic 4 Set yearly asset-based development goals as a region**

- Assist each community affiliate with goal setting for asset development.
- As host support work of affiliates in achievement of their goals.
- Cumulatively target intentional planning for growth to meet annual 5% growth goal as an entire Foundation system.

### **Measurement**

We will be successful if:

- CKCF will finalize a strategic outreach plan by August 2018 (Strategy 4), this will be a model for affiliates while keeping CKCF as a whole focused on outreach targeted efforts regionally.
- Implementation of a strategic development plan for each foundation as they are ready and invested in the work by December 2020.
- Self-Reported confidence by board members in their outreach abilities improves, determined the survey process in 2018 and 2019.

- By December 2020 paid staff directly engaged with asset development have completed the CF Express Training certification.
- At least 2 CKCF board members and at least 4 affiliate board members complete the CF Express Training Certification annually.
- The affiliate foundations reach or exceed each of their yearly goals by December 2020.

#### **Strategy 4**

#### **CKCF will develop a specific strategic messaging and outreach plan in support of our service region**

Central Kansas Community Foundation as host is still largely responsible for management of the Newton community with foundation activities and fund development. We expect the responsibilities to transition more substantially in late 2018 or 2019 if a Newton Affiliate is established. In the meantime, CKCF as host will be creating a regional development and messaging plan by August 2018 in coordination with developing messages that support the system including Newton. This plan will largely be foundation-driven as we work to create our donor-centric strategy. Again, our focus will be steadfast on the regions gift potential and return on investment. This will be much more fine-tuned in the latter two years of the plan.

#### **Tactic 1**

Identify industry approved messaging for effective communication

- Use Crescendo to guide industry and awareness-type messaging. Crescendo is the leader in creating messages that brings industry trends to segmented donor and partner groups.
- Use existing donor and strategic partner database for cues on appropriate messages for each segmented group.
- Develop a messaging campaign for donor outreach – consider “What’s Your Passion?” and other themes to promote specific areas of charitable passion as well as charitable instruments we offer, for example Charitable Remainder Trusts (CRTs), Donor Advised Funds, Testamentary/Donor Advised Memorandums.
- Distribute updated system news, events and highlights on a monthly regime.

#### **Tactic 2**

Provide easy to access outreach and asset development materials for use by affiliates

This is currently in progress. It will employ messages developed in Strategy 1.

- Build out the Affiliate Page on website with resources for easy to access materials for their use.
- Create a format for social message distribution as CKCF and direction for affiliate dissemination (Tactic 3).

#### **Tactic 3**

Create a format for social message distribution for CKCF with direction for affiliate dissemination.



As we communicate many different topics, a schedule seems appropriate. This will appear in the blog section of the CKCF website, and will be posted to Twitter, Facebook and LinkedIn on Tuesday of each week. A schedule for the entire year, complete with content is being created for ease of implementation. We anticipate experimenting with the schedule from March to June and then firming up a schedule going forward. Resources on the Affiliate Page will provide them direction on who to repost or use messaging from CKCF.

### Example Schedule

- CKCF Website
  - Week 1
    - Blog – latest industry news/planned giving news/item
    - News – system news item
    - Event – updated list of system events and activities
  - Week 2
    - Blog – human interest story
    - News – system news item
    - Event – updated list of system events and activities
  - Week 3
    - Blog – “What’s your passion?” Feature a fund in an area of giving, i.e. education, health, arts
    - News – system news item
    - Event – updated list of system events and activities
  - Week 4
    - Blog – CKCF specific message – message from the Director
    - News – system news item
    - Events – updated list of system events and activities
- Plan two system-wide donor mailers focused on ways to give or endowment contribution – one in the spring, one in the fall.
- Donor and Advisor newsletter registration is promoted online and at all gatherings to grow list of participants in the newsletter distributions.
- Develop a case for support for personalization and use by the system in reaching out to donors.
- Distribute CKCF and affiliate foundation press releases to media with goal at least 1 per month.
- Repurpose Giving Tuesday – highlight affiliate foundation Giving Tuesday activities and promote Giving Tuesday as a concept.
- Host a system wide donor appreciation event, may be significant donors or segment of donor base.
- CKCF office perform 4 soft donor touches per week, may be call, sending follow up report from charity they supported, just because.

### **Measurement**

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CKCF Board Approved, April 23, 2018

We will be successful if we:

- We are visible on social media, new print and in conversations on the street as the go-to place for charitable giving and local grant making.
- The participants in our Donor and Advisor Newsletters increase (year one we do not have enough information to make a goal recommendation, will monitor for years 2 and 3).
- Ultimately communications turn into new gifts and funds providing an increase in our asset base by 5 percent by December 2018.

### Strategy 5

#### Monitor investments and manage growth in the funds

This is a very important part of development. Finance Committee oversees our gift acceptance policy and investment and spending policy guidelines. Cooperative work between CKCF leadership, partners and donor relations will contribute to an increase in the asset base along prudent investment management.

#### Tactic 1

Set yearly asset-based development goals beginning with 5% increase

- In anticipation for budgetary needs and strategic operational expenditure growth determine asset growth goal during time of budget development annually.
- Share growth goal as CKCF with affiliates in coordination with their local growth plans as a component of the whole operational budget

#### Tactic 2

Provide fiduciary oversight to the funds under management, providing prudent stewardship of donor dollars.

- Finance Committee review investment performance monthly.
- Continue evaluation of new Primary Investment Management Firm and Independent Managers for performance results.
- Educate local advisors on Independent Investment Management opportunities.

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### Conclusion

As the role of the CKCF host continues to formalize as the regional backbone, we envision providing strategic development direction for the system and focusing efforts on developing messages and outreach strategies that are meaningful to our donors and strategic partners. The role of CKCF staff will transition largely from development for CKCF as a Newton entity to providing outreach, communication and the facilitation of gifts committed to our affiliate organizations to ensure legal and industry standards are administered and adhered to.

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CKCF Board Approved, April 23, 2018

As donors in each affiliate community move from periphery to core donors, become more invested in the mission of CKCF, and we see an increase in relevance in our regional communities we believe there is an opportunity to generate support for the host and develop CKCF operational endowment funds for our long-term sustainability.

As this document, the CKCF Development and Communication Plan, was created as a revision to the 2015-17 Development Plan we intentionally merged asset-development growth planning along with strategic communications and outreach strategies due to the relational aspect of a traditional donor pyramid process.