The College of St. Francis

75th Anniversary Campaign

Plan and Timetable

Introduction
In 1995, the College of St. Francis will celebrate its 75th anniversary. This important milestone in the College's history will be a cause of public awareness and interest, and activities will maximize the public relations benefits of this important anniversary. The CSF Development Office will take advantage of the opportunities created by the 75th anniversary to maximize its efforts to secure contributions from alumni, friends, corporations and foundations in support of current and future needs.

Strategic Issues
In 1995-1996, the College of St. Francis is undertaking a $2 million fund raising campaign to support Student Financial Assistance, Endowment, and Institutional Academic Needs. The plans for this campaign have been formulated with the following strategic issues in mind:

1. Historically, CSF has received 80% of contributions from friends in the community, and 20% from alumni.
2. CSF will celebrate its 75th anniversary in 1995-1996, providing significant opportunities for increased public awareness and extraordinary institutional undertakings.
3. Donors to CSF's Investment in Tomorrow campaign have completed or will complete their campaign pledges in 1995.
4. Two multi-million dollar campaigns are underway in Joliet for prominent not-for-profit institutions, and these campaigns will be completed during the 1995-1996 years.
5. CSF faces ongoing and increasing financial pressures, both operational and capital, which the Development function is challenged to package effectively so as to attract contributions in support of these needs.

Plan
The 75th anniversary campaign will target appeals to three distinct constituencies -- Alumni, Friends, and internal constituencies. The campaign will target each constituency with an appeal that will be as personalized and motivational as possible. Preliminary activities will generate awareness of the College’s diamond jubilee and will attempt to instill or rekindle fondness and appreciation for the College, its mission and its excellence in pursuit of its goals. All campaign activities will highlight the 75th Anniversary as a significant milestone in the College's history, and that each member of the three constituencies shares in that accomplishment in some way. The anniversary will provide more impact to almost all campaign activities than they would otherwise have outside of an anniversary year.

The anniversary campaign will not only result in increased giving during the anniversary year, but it will also mark the starting point for many development efforts that will continue as part of an ongoing development program. Included in the plan are increased communication with alumni, significant expansion of alumni participation in Institutional Advancement, targeted annual fund appeals, and enhancements to donor recognition.
The following plan divides anniversary fund raising activities into three distinct campaigns that will be conducted simultaneously. Wherever possible, economies will be leveraged to minimize expense and maximize impact of campaign activities.

75th Anniversary Alumni Campaign

Strategic Issues
The following strategic issues and/or opportunities must be addressed to ensure that an alumni fund raising appeal realizes its maximum potential:

1. Three distinct alum constituencies -- on-campus graduates, Health Arts program graduates, Graduate Studies program graduates. 58% of graduates are non-traditional, off-campus.
2. Lack of alumni organization that provides reach outside the Joliet Area.
3. Class year approach only applies to on-campus graduates, 42% of alumni.
4. Health Arts and Graduate Studies program graduates are geographically diverse.
5. Geographic “pockets” of students/alums exist.
6. CSF program staff members visit remote sites every semester.

Definitions
To understand the design of the anniversary campaign for alumni, it is necessary to define the alumni population, which is comprised of the following groups:

- On-Campus Graduates -- attended CSF in Joliet; approx. 8,000
- Health Arts Graduates -- attended CSF Health Arts classes at remote sites; approx. 14,000
- Graduate Studies Graduates -- attended CSF graduate classes at remote sites; primarily Health Services Administration graduates; approx. 2,000

Plan
The three alumni groups need to be approached in different ways, appealing to the appropriate connection with the College, and reminding them of the specific benefits each has received through the CSF program they attended. The overall approach educates as well as motivates, and will be as personal as possible. All of the above strategic issues have been addressed and incorporated into the plan for the Anniversary campaign. The following plan outlines activities individually for each of the above mentioned alumni groups.

On-Campus Graduates (8,000)
1. The CSF Alumni Board (AB) will identify on-campus alums according to class year, major program, team and club memberships.
2. Staff will prepare a listing of identified alums, script, supporting materials for Alumni Board recruitment of Team Leaders (TL). AB will help formulate the case for support for on-campus alums.
3. AB members will recruit TL’s through phone calls and personalized letters. Once recruited, Staff will contact TL’s with additional information and support materials.
4. TL’s will recruit additional team members in the same fashion the TL’s were recruited by the AB. Staff will provide support and materials.

5. TL’s and team members will receive class lists of graduates to review and select to personally phone and solicit for anniversary gifts. A reporting system and schedule will be established to enable TL’s to report to Staff on assignments and names not assigned. Staff will follow up as appropriate.

6. All on-campus alums will receive Anniversary Campaign materials (general mailing of cover letter and brochure, highlighting the celebration of CSF’s 75th) from the Development Office.

7. Staff will prepare and mail personalized letters from AB members, TL’s and volunteers asking alums to consider a minimum gift of $75+ (depending on past giving) and indicating that a volunteer will be calling on behalf of the Alumni Assoc. For unassigned on-campus alums, the solicitation letter will come from a member of the AB.

8. Calls will be made by volunteers to assigned alums. Unassigned alums will receive a call from the AB member who signed the solicitation letter.

9. All alums will receive a follow-up letter -- thank you to those who gave or made a commitment, thank you with return card and envelope to those who did not commit.

10. Alums who do not contribute in the Fall of 1995 will receive another appeal in Spring 1996, asking for their help in closing out the campaign.

11. All alums who gave will be recognized in a commemorative 75th Anniversary Campaign donor listing, organized by class and by size of gift.

Health Arts/Grad Studies Graduates

1. Staff contact current and past site coordinators (SC), Service Award recipients, and alumni identified by CSF HA/GS staff to provide an overview of the 75th campaign and recruit as TL’s/volunteers.

2. Staff conducts interviews with SC’s/alums/students to develop compelling case for Health Arts/Grad Studies groups.

3. Staff sends TL’s lists of graduates in local geographic area; TL’s review alumni lists and identify grateful/enthusiastic alums to be recruited as TL’s and team members.

4. Staff provides script and support materials to TL’s for recruitment of local alums as additional TL’s and team members. Staff will provide support materials to team members once they are onboard.

5. TL’s meet with team, review alumni lists, take assignments for solicitation. TL’s will monitor this process and communicate assignments to Staff. Staff will assist SC’s in identifying and securing centralized calling locations.

6. Staff will prepare appeal packets with personalized solicitation letters to alums for TL’s and team members, and mail. Copies will be sent to TL’s/team members. Unassigned alums will receive letter from Chancellor/VPD.

7. TL’s and team members will call alums from their homes or from a central location to solicit; TL’s and volunteers will report back to Staff through a reporting schedule. Where calling is centralized, Staff will schedule visit during calling when possible. Unassigned alums will be called by Staff and volunteers.
8. Staff will prepare thank you letters for all alums -- thank you to donors, thank you with gift card and return envelope to those who did not commit, and thank you to those who refused.

9. Non-donors will receive an additional solicitation in Spring 1996, asking them to help successfully close the alumni campaign.

75th Anniversary Friends Campaign

Strategic Issues
The following strategic issues impact the planning and success of CSF 75th Anniversary fund raising efforts among non-alumni constituencies:

1. CSF depends on a small group of non-alum individuals for the success of its fund raising programs. This group is aging, and as more local organizations become more sophisticated in their fund raising efforts, CSF will compete for the philanthropy of this group.

2. CSF has received regular support from a small circle of foundations, both corporate and private, many of which are local.

3. Two major fund raising campaigns by prominent not-for-profit institutions in Joliet will increase competition for philanthropic dollars, and will potentially limit the availability of these dollars for CSF in the next few years.

4. Donors to CSF’s most recent capital campaign have completed their pledge payments, or will do so by the end of 1995.

5. The 75th Anniversary celebration will draw attention to the College, and provides a natural opportunity for an extraordinary undertaking.

Plan
The plan for the 75th Anniversary Friends Campaign is comprised of two areas of focus: the renewal of support from donors to past CSF fund raising campaigns, and the identification and solicitation of new prospective donors from Joliet and elsewhere. The plan includes approaches to individuals as well as to corporations and foundations. The following outline describes the activities that will be undertaken in the Friends Campaign:

1. Donors to the Recreation Center and Investment in Tomorrow campaigns who have completed their pledges will be identified.

2. Strategies for past donors will be developed to include solicitation level, appropriate volunteers to participate in the cultivation and solicitation, and the program to which the donor will be asked to contribute.

3. Past donors to be solicited will be assigned to CSF Development Staff, Development Committee members, and CSF Board of Trustee members, as appropriate. CSF Development staff will provide all support materials.

4. Local businessmen and women who may be considered prospective donors will be identified by CSF Development Staff, Development Committee members and the CSF Board of Trustees.
5. Strategies for solicitation of prospective donors will be developed by CSF Development Staff and the individual(s) who provided the prospect name. Strategies will include solicitation level, appropriate volunteers to participate in the cultivation and solicitation, and the program to which the prospect will be asked to contribute.

6. Prospective planned gift donors will be cultivated through correspondence, phone calls and personal visits from CSF Development Staff. Planned giving seminars for individuals will also be conducted, and planned giving prospects will be invited to attend. Strategies regarding the type of planned gift that will be sought, the solicitation level, and the staff and volunteers to be involved will be developed by the CSF Development Staff.

7. Planned giving newsletters and follow-up brochures containing information on planned gift opportunities will be mailed quarterly to all alums aged 55 and older. Personal follow-up will be provided by CSF Development Staff to recipients who indicate interest in planned gift opportunities and estate planning.

The above process will include individual donors and prospects as well as corporate and foundation donors and prospects. The identification and strategy development process will be dynamic and ongoing throughout the duration of the 75th Anniversary year.

CSF Family 75th Anniversary Appeal

As part of the 75th Anniversary Appeal, CSF faculty, administration, and staff will be asked to participate in the fund raising efforts of the College. Members of the CSF family know better than anyone else the unique nature of the College, the relevance of its mission, the critical need for the values and principles it stands for, and the importance of its continued strength. It is also important to some donors that fund raising efforts include internal constituencies, and that this group supports the College in a tangible way.

Plan
The plan to involve employees in the CSF Family 75th Anniversary Appeal is straightforward and will be implemented as follows:

1. Select employees will be recruited for an Employee Campaign Committee. This group will be representative of all major employee groups including faculty, administration, and staff.

2. The Employee Campaign Committee will help to craft a case for support and a specific project or program to be funded through the generosity of employees (i.e. a CSF Employees Scholarship).

3. The Employee Campaign Committee will attempt to recruit a team captain from each of the major departments within CSF who will serve as the conduit for campaign information and will collect pledge cards from fellow employees.

4. Employees will be sent campaign information to their homes, pledge cards will be distributed at work.

5. The Employee Campaign Committee will make presentations to departments during the campaign, and encourage employee support.

6. Team captains will collect completed pledge cards and the CSF Development Office will acknowledge the contributions of all employees.
The purpose of the Employee Campaign is to involve the employees of CSF in the 75th Anniversary Campaign, and provide them with the opportunity to do something meaningful for the College. For most employees, this will be a once in a lifetime opportunity. Results of the Employee Campaign will be used in the solicitation of some corporate and foundation donors who are interested in seeing employee support for the campaign.

Additional Activities:

Campaign Presentations -- In areas with geographic concentration of alums, representatives from CSF and TL’s/team members will present the Alumni Campaign appeal to groups of alums. Local past SC’s and known alums identified by the AB and others within CSF will be asked to host receptions for this purpose. Past SC’s and other known alums will be asked to encourage attendance. Invitations will come from CSF Development Office, and will highlight presentations by CSF President, Chancellor or VPD. In areas not able to organize an alumni reception, current and past SC’s will invite alums to the scheduled site visit by CSF program staff at which a 75th “birthday party” will be held. These receptions will afford an opportunity to identify enthusiastic/grateful alums.

Communications Support -- Alumni communications will become more targeted and frequent. Francisline should become the CSF Magazine and serve an overall institutional advancement purpose. The Development Office will produce an Alumni Newsletter that will focus on the Alumni Annual Fund, mailed 6 times per year, beginning in early Fall 1995. Communications will create the impression of a full-fledged CSF alumni association. Additional campaign-specific flyers will be sent to volunteers as needed throughout the year. The Newsletter will be written by staff, but presented as from AB; provide encouragement from AB.

Alumni Board Role -- The role of the AB will be defined and enhanced through the development of a new mission statement, and corresponding detailed revisions to the Association Constitution and By-Laws. Members will be asked to assume specific responsibilities beyond the current scope of activities. The AB will be asked to focus on promoting an alumni organization that strengthens the College. Additional AB members will be nominated based on age, program and geography. Each AB member will be given specific responsibilities: host events (reception for Chancellor, freshman send-off, networking, holiday reception, etc.), identify nominees to AB who meet age/program/geography criteria, identify and establish a leadership committee for local areas, communicate directly and often by phone and letter with local alum leaders. Staff will support AB to identify potential leadership committee members and help to organize major events.

Giving Opportunities -- The approach to alumni and friends during the 75th (and beyond) will not be for a general Annual Fund; each year the Annual Fund appeal will target specific needs rather than a collection of uses. Endowment will be emphasized as a way of solidifying the achievements of the first 75 years, and beginning to build the next 75 years -- to ensure the future of our current strengths and provide for the development of building new strengths. Major gift solicitations will present specific giving opportunities which are priority needs of the College. Giving opportunities will be identified by the CSF President and VPD, and developed in the areas of financial aid, endowment and institutional academic needs.

Giving opportunities presented to broad alumni constituencies will be structured as annual gifts rather than the more typical multi-year pledges found in a campaign. Specific dollar amounts will be included in personalized letters, and the ask amount will be based on the past giving history of those asked, with the minimum ask set at $75. Focus groups will be held with members of each graduate constituency to determine the most effective appeal for attracting funds.

Major gift solicitations will present several specific needs at specific dollar amounts, accompanied by brief descriptions of each need. Multi-year pledges will be sought to maximize donors’ abilities to support the College.
Recognition -- The recognition provided to donors will be enhanced and restructured. Special recognition will be provided to donors to the 75th Anniversary Campaign. The 75th Anniversary recognition will be structured as follows:

- **Anniversary Donor:** $75+
- **Jubilee Donor:** $750
- **Founder:** $1,920+
- **Diamond Donors:** $7,500+

Regular annual fund recognition will be enhanced to tie recognition levels more closely with the identity of CSF, and to encourage donors to give at increased levels annually. Recognition will be structured as follows:

- **Chancellor's Club:** All Planned Gifts.
- **St. Francis Society:** $10,000+, not cumulative, current members would be included.
- **CSF Circle:** $25,000+; may be pledges.
- **Mother Moes Society:** $5,000+ annual gift.
- **Founder's Club:** $1,920+.
- **Advancement Club:** Change name to Tower Club; for annual gift of $500+.
- **Achievement Club:** Change name to Leadership Club; for annual gift of $100+.
- **Friendship Club:** Stays the same.

Recognition for donors to the 75th Anniversary will be recognized in a commemorative 75th Anniversary Donor List. Donors will continue to be listed in the Annual Donor Report with the exception that Health Arts and Graduate Studies alums should be listed separately by state.
College of St. Francis 75th Anniversary Campaign
Alumni Appeal Timetable

March - April 1995
Alumni Board members identify prospective team leaders/team members for On-Campus alumni appeal. (Completed.)
CSF staff is contacting current and past HA/Grad Studies site coordinators to ask for their assistance in the 75th appeal and in identifying/contacting team leaders/team members. (Completed.)
Staff has prepared support materials for Alumni Board recruitment of on-campus team leaders. Completed. Staff is preparing support materials for team leader recruitment of team members, including lists of local alums, personalized letters and phone recruitment script. (Completed.)
75th Anniversary brochure written, designed, prepared for printing -- one brochure to on-campus alumni, one brochure to off-campus alumni. (Completed.)

May-June 1995
AB continue to recruit team leaders/team members for 75th campaign. Staff provide detailed information to recruited alums. (Completed.)
75th Anniversary brochures printed. (Completed.)
Staff provide alumni lists to TL's and members for review. (Completed.)
SC’s continue to recruit team leaders/team members, report to Staff. Staff provide detailed information to recruited alums. (Completed.)
Staff will organize preliminary visits to major alum areas to set up Chancellor visits for Fall 95. (Completed.)
Staff assist in organizing local alumni events. (Completed.)
VPD will work with Alumni Board president to formulate a mission statement for the CSF Alumni Association. (Completed.)
VPD and AB recruit additional AB members. (Completed.)

July-August 1995
Staff conduct 3-4 focus groups and conference call interviews of 8-10 HA/Grad Studies alums each, regarding the alumni fund raising appeal and case for support. (In Process)
75th anniversary brochures distributed to AB, SC’s and volunteer alums with thank you and more detailed information about Alumni Campaign. (In Process)
Specific roles and responsibilities of the Alumni Board developed based on the mission statement. (In Process)
Staff develop specific appeals for three alumni constituencies. (In Process)
TL’s complete team member recruitment, report to Staff on recruitment results.
Staff continue organizing visits to major alum areas to set up Fall 95 Chancellor visits. (In Process)
Staff provide alumni lists to volunteers to assign solicitations.
Schedule for Alumni Campaign distributed to volunteers; staff set up reporting schedules.
Staff assist SC’s, TL’s to centralize calling in Fall 1995.
Schedule for 75th Birthday Parties at remote sites finalized, distributed to SC/TL, team members.
Staff assist in organizing local alumni events. (In Process)
75th Anniversary brochure mailed to all alumni.

September-October 1995
Staff prepare personalized solicitation letters; mail to alumni, copies to assigned callers.
Phone solicitation starts -- SC/TL/team members call assigned graduates, students call unassigned alumni. Ongoing reports to Staff by volunteers.
Alumni newsletter published highlighting early results and generosity of alumni to campaign.
Flyer to volunteers encouraging them and giving direction on reporting to Staff.
Chancellor visits held in major alumni areas.
Staff assist in organizing local alumni events.
November 1995
Students and volunteers stop calling Thanksgiving.
Site visits and 75th Birthday Parties continue.
Staff assist in organizing local alumni events.
Board of Trustees Solicitation

December 1995
Holiday Alumni Newsletter/Holiday Card, thanking donors to Alumni Campaign and volunteers; indicating that the appeal will continue in Spring and the goal is 100% participation.
Staff assist in organizing local alumni events.
Board of Trustees Solicitation completed.
VPD begins recruiting Joliet Campus Employee Campaign Committee

January-February 1995
Staff continues to recruit volunteers/assign additional names to volunteers of alums not yet solicited.
Personalized letters prepared to non-donors, non-contacted; letters mailed, copies to appropriate volunteers.
Chancellor visits continue in major alumni areas.
Alumni Newsletter published highlighting Chancellor visits, alumni activity in the 75th, future 75th events, and Spring Campaign Follow-up.
Staff assist in organizing local alumni events.
VPD recruits Joliet Campus Employee Campaign Committee. Staff prepare materials (letter sent to home, specific ask based on past giving, brochure highlighting the importance of employee giving, benefits of working at CSF).

March-April 1995
Phase two of Alumni Campaign letter/phone solicitation, same process as Fall 1995.
Students assigned names for which no alumni caller has been assigned.
Chancellor visits continue in major alumni areas.
Staff assist in organizing local alumni events.
Joliet Employee Campaign conducted.

May 1995
Alumni Campaign concludes end of May.
Joliet Employee Campaign concluded.

June 1995
Alumni Newsletter/Final Report/Thank you published.

Ongoing Activities throughout Anniversary Year
Alumni Campaign news will be incorporated in existing Health Arts and Grad Studies alumni and student publications, as well as Francisline.
Major Gift solicitations will be conducted throughout the year.