



**Building Capacity and Addressing Issues
to Advance the Fundraising Efforts
of the
Springville Center for the Arts**



**Report Compiled
by
Ted Pietrzak + Associates**

January 3, 2019

This project is made possible by the New York State Council on the Arts with the support of Governor Andrew Cuomo and the New York State Legislature, and administered by CNY Arts



Background to the Engagement with TP+A

On behalf of the Springville Center for the Arts (SCA), Seth Wochensky, Executive Director, contacted Ted Pietrzak in June 2018 regarding a possible engagement to assess and make recommendations to improve SCA's fundraising capabilities.

Within the small rural community of Springville, NY, population 4,500 with another 4,500 in the surrounding areas, the Springville Center for the Arts has grown dramatically with significant investment by the State of New York. The Baptist Church on N. Buffalo St. has seen extensive renovations to incorporate a theater, an art gallery, new restrooms, and workshop spaces. An adjacent building, the church parsonage, was purchased and is currently being used as a residence for SCA's summer interns who assisted with the summer arts program. Also, an abandoned and severely dilapidated building at 5 East Main St. was purchased and is being transformed into an Arts Café with a performing arts space, studios, and loft apartments.

The capital investment has been \$1.3M to date with continued construction and renovations planned. Through a compelling vision, wide engagement by volunteers, and hard work, the arts have been transforming Springville, NY since SCA was created in 1974 and gained charitable status in 1998.

Investment in SCA's organizational infrastructure has been predictably limited with the organization and its leadership focusing on aggressive capital expansion plans, and the expansion of programs. Increasing annual operating support has also been challenging due to SCA's location in a small rural community. Though much has been accomplished in terms of capital acquisitions, facility expansions and improvements, it has come with the cost of impeding the organizational development in key areas, some of which will be addressed in this report.

Ted Pietrzak and Associates, working with Laura Scala of Total Fundraising Solutions, were asked to review current fundraising efforts, identify issues, and recommend solutions and new initiatives to ensure SCA's sustainability. Because of the modest resources available for the consultative process, TP+A was not able to conduct a more comprehensive interview process with significant donors and corporate and elected community leaders in the region. The analysis of financial documents was also limited to available donor data in spreadsheets maintained by SCA.

Preamble

Effective fundraising and eventual organizational sustainability requires a holistic approach to institutional management.

As with the total health of a person, if one concentrates on healthy food and not attending to exercise, one will only address part of the equation towards personal health. SCA's leaders realize that the capital growth and program development to engage the community has created deficit investments in other areas of the organization's health such as board development, institutional advancement, and volunteer development. **This preliminary report will attempt to connect the various organizational factors that may not speak to fundraising directly but do indirectly affect fundraising.**

1.0 Review Process

The engagement included several components including a review of SCA documents, reports, and information sources. The following were reviewed:

Financial Statements

Strategic Plan

Donors and Contributions Lists

2017 and 2018 Members' Year-End Appeal and Renewal Letters

Art's Café Prospectus

Website, Social Media, and other Electronic Communications

Also included were the following:

Tours of the Art Center and the 5 E. Main Street building.

Luncheon interviews with Board members, Dr. Kasey Gaines, Mary Carol Dearing, Jeanne Fornes, and Mark Stevens.

Confidential interviews were held with Tracy Maybray, Director of Operations and Allison Duwe volunteer.

Executive Director, Seth Wochensky provided interviews and made relevant documents available.

1.1 Observations During the Review Process

Regarding Capital and Annual Fundraising Efforts

- SCA has raised significant funds for its capital needs from NY State, now totaling \$1.68 M with current grant contracts.
- SCA has also exercised imagination to close capital gaps such as selling tax credits to local investors and offering loans and a bond with a return of 4% annually, totaling \$600,000.
- Recent crowd funding for capital has raised \$89,000 from 40 donors.
- The annual fund efforts lags and fundraising potential is not being maximized, due to heightened efforts to expand facilities and focus on meeting capital campaign goals.
- A lack of fundraising experience/understanding of how to take an annual and multi-year approach to member cultivation and overall fundraising/development hinders the organization.

Leadership and Attitude

SCA's Executive Director (ED) has proven to be a driven and effective leader with vision and a "Get S___ Done" (GSD) attitude and expects the same from staff and volunteers.

Though the ED is admired for his drive, some individuals expressed concern that a more realistic approach to support staff's needs and volunteer's expectations would be welcomed and beneficial.

Staff and Volunteer Support

SCA is understaffed with only two full-time and one part-time staff positions. Some staff feel that sometimes the ED's expectations of them are the same driven commitment that he possesses, and that might be unrealistic.

The Board of Directors is composed of nine members.

The ED's spouse, once the board chairperson, has significant knowledge with regards to fundraising and has provided support in the past as a volunteer, but no longer has time to volunteer in fundraising efforts and funds are not available to hire a person in this capacity.

Volunteers are expected to support fundraising events, but it is difficult without a work calendar and handbook for organizing the events.

Some expressed concern that "we can't get everyone together to evaluate and assess events in order to improve them."

A Board advancement committee does not exist. Volunteers and staff just get together and organize events. Sometimes, the lion's share of the work falls to one or two people causing "burn-out" and disinterest in renewing involvement.

Regarding one special event, relationship records regarding who has gotten a sponsorship or basket from whom do not appear to exist and need to be re-created for the event the following year.

The ED promotes cultivation by making performance tickets available for Board members to use to bring friends and associates to the productions. Thank you notes are also sent, but Board members are generally unaware of any additional cultivation follow-up.

We received mixed messages regarding the degree to which Board members are oriented and informed of SCA's expectations of them.

1.2 What the data tells us and where more information is needed?

Developing successful fundraising strategies should be based on a clear understanding of SCA's consumers, users, subscribers, and supporters. At this time, we know the following:

83% of the 350 donor/members live in Springville, NY or the surrounding rural area.

Of the 747 theater tickets sold, 67% or 501 tickets were purchased by people in Springville or the surrounding rural area.

We do not know how many there are in distinct groups, their preferences and what they (individually and as defined groups) see as the organization's value proposition. By understanding SCA's stakeholders, programs can be developed, as well as methods adopted to sustain and grow participation and support.

At this time, we do not know why people support SCA. We assume that some may support SCA because they believe in the contribution the organization makes to the community. Others may support the educational opportunities for children and young adults. Yet others see SCA as fostering economic development and community renewal.

Some will base their support on the relationship they have with leaders in the organization. Others wish to volunteer and may limit their support to that area. While other's support may be solely transactional with the payment of a fee to attend workshops, obtain a theater ticket, receive an exhibition invitation, or get a discounts, etc.

Recommendation:

- We recommend getting more accurate information from SCA's various stakeholders through surveys and interviews. This will assist in developing a "branding strategy."

Besides obtaining more data of what stakeholders want, it may also have secondary benefits including encouraging individual supporters to think more broadly about the value SCA brings to the community. The gathering of stakeholder information may also better clarify the value proposition statement, which would assist with future fundraising efforts.

1.3 Understanding What the Data Tells Us

Earned Revenue

Earned revenue (ER) includes ticket sales, workshops, off-site contracted activities, rentals, and ads/playbills. SCA's ER, is a healthy portion of its overall income. ER has shown growth over the last year (2017) and year-to-date figures show significant growth over the 2017 year-end.

In 2017, ER was 26% of total income. In the 2018 budget ER represents 34% of overall budgeted revenue, representing anticipated growth 14.3%. Year-to-date actuals suggest promising year-end results.

2.0 The Plan

A more structured approach to goal setting regarding fundraising (for the Board and staff) and staff management would help and ensure that expectations are realistic and spelled out. Not enough of a plan is laid out for how to prioritize what work needs to be done and what could be outsourced if funds were available.

Recommendations:

- Set goals for each revenue generation area,
- Collectively (board and staff) agree to goals, tactics, lead persons and related responsibilities,
- Have the board Chair and ED monitor progress and results and have update reports provided to the board.

3.0 Improve and Expand Earned Revenue Income

ER is made up of areas where SCA provides a service or benefit for a fee. This would include fundraising events, membership sales, contracted services, ticket sales, workshop/class fees, and sponsorship. We included sponsorship contributions to ER because of the advertising and marketing benefit that sponsorship brings to their business, or corporation.

3.1 Earned Revenue - Fundraising Events

SCA has two special events. The Gala is an outdoor mini-golf party with a silent auction and basket raffle. The Main Street Art Crawl, is more of a “friend-raising” event and includes an open-air party on Springville’s Main Street where stores and businesses are open and feature special art displays, gallery spaces feature arts and crafts exhibits, and participants end up at SCA’s N. Buffalo Street building for a party.

Recommendations:

- Conduct a comprehensive review of fundraising events. Create a task force that includes staff and volunteers that would report to the Board on the effectiveness of fundraising events. This would include the following:
 - Assess return on investment (including staff and volunteer time).
 - Regarding net revenue earned.
 - Review how the event aligns with SCA’s mission, etc.
 - The task force can also make recommendations as to the Main Street Art Crawl being more than a friend-raiser.
- Create a fundraising events handbooks that should include the following:
 - A schedule and timeline for the planning and execution of each event.
 - Past committee members and their fundraising assignments/contacts.
 - A listing of existing and potential sponsors and the name of the trustee who has the closest connection to them (for cultivation).
 - Sample budgets.
 - The previous year’s event final report.
- The event committee should conduct a full evaluation after each fundraising event. If a committee member is unable to attend the evaluation, staff should request written suggestions of what the committee member feels should be maintained, improved, or no longer undertaken.

Potential burn-out of staff and volunteers should be a concern to all organizations and should be prevented. The organization of a special event often puts onerous work on a single person or small group of volunteers who then can become disgruntled and less willing to volunteer again.

Recommendation:

- The chairperson of the event must emphasize how important it is for everyone to take up their responsibilities and leadership roles. Responsibilities should be discussed at an early meeting of the committee.
- SCA should consider hiring an event planner for specific events since special events are extremely time-consuming and drain staff of time and energy that could be spent on

programs or other development efforts. There may be a person in the Springville area that has the expertise and characteristics that are required to plan events. This could be a part-time, or contract position.

- Consider generate additional income by organizing a musical series for the town of Springville (see Section 2.3). Other options for special events may include a music festival created with the Ashford Hollow Foundation where revenue can be shared.
- Maximize sponsorship giving in association with events (see Section 3.5)

3.2 Earned Revenue - Membership

SCA has between 200 and 300 membership and there are not a lot of benefits associated with membership. We were told the membership is offered in the fall and if an individual or family wants a membership at any time before or after they can purchase a membership but they will be solicited in the fall unless the membership was purchased shortly before the regular fall solicitation. The fall solicitation is an effective way of reducing costs associated with monthly membership management, but it makes it next to impossible to run a successful Year-End Appeal (YEA). (See Section 3.0)

Without significant membership benefits, there is not a clear designation between “quid-pro-quo” membership and philanthropic donations. The Member Year-End Letter reads more like an Annual Fund letter. The Membership Renewal Letter notes some activities, but not full details of what a membership actually generates at SCA. It also includes the line “renew your membership and make a charitable contribution today.” That reads like asking for two different things at once, which is confusing and would likely only generate one type of gift as opposed to two.

Recommendations:

- SCA must create a strong membership program that is separate from a YEA solicitation.
- Approach the membership process differently. Base membership benefits on a 12-month period starting from the date it is purchased. This separates membership from the YEA with the appeal in late November early December. We understand that this takes more work in terms of managing the membership base every month, 12 times a year, but it will yield more in terms of YEA donations.
- Craft membership letters that emphasizes the benefits that members receive, and YEA letters on the overall impact that philanthropic donations have on SCA and the community.
- Benefits should be redesigned to increase at higher levels of giving. Though we are not thoroughly familiar with all of the options available to SCA, some of the following ideas show a sample of what may be considered:

Sample membership levels

\$15 Student Member

-Advance email notices to workshops and events

\$30 Regular Member

-Advance notices of events

-Invitation to free members appreciation night at SCA

\$50 Family Membership

Above benefits PLUS

-Discounts on workshops and classes

\$100 Bronze Patron

Above benefits PLUS

-Acknowledgement on SCA's website

-Reduced commission charges on the purchase of artwork from the gallery

\$250 Silver Patron

Above benefits PLUS

-Two free concert or theatre tickets during membership year

\$500 Gold Patron

Above benefits PLUS

-Invitation for two to a special annual tour to meet artists at their homes, or studios

\$1,000 Platinum Member

Above benefits PLUS

-Name recognition as one of the presenting sponsors for an exhibition, concert or theater production, (note that this is not exclusive to one Patron Member and that there may be additional sponsors named for the event)

-A private one-on-one lesson with an area artist

Recommendations con't:

Membership Upgrades

- Focus on "behind the scenes" solicitation message identifying the percentage of operating costs that memberships actually cover in a specific area.
- Include a targeted membership upgrade ask in each renewal letter. Research and consider using a firm such as Marketing Tech which can automatically print upgrade membership amounts in appeal letters.
- Consider membership acquisition strategies
 - Improve name/contact information capture during performances and events and solicit new prospects for membership (i.e. list purchase available at Marketing Tech.).
 - Offer a "new member" incentive with prospect mailings.

Additional Improvements:

- Promote gift memberships for all special occasions/holidays.
- Update membership information on website to better educate members and member prospects and make it easier to renew, upgrade, and join electronically.
- Encourage all members to sign-up for e-blasts to easily keep up-to-date with SCA's happenings.
- Create an e-mail campaign to current members with a "forward to a friend" request.

- Create a self-mailer donation envelope to use as a return piece with direct mail - also to use at performances and events to capture contact information with gifts/memberships.

Future Considerations:

- Research companies that specialize in member acquisition.
- Increase the number of annual memberships appeals and strategize the timing (making sure the mailings don't conflict with the current membership or a YEA).
- Segment donors into specific groups (i.e. volunteers, concert attendees, theatre attendees, etc.) and customize the mailing theme to suit their interests.
- Survey lapsed members with a phone call from a volunteer to determine why their membership became lapsed and encourage them to re-join (offer a "re-join" incentive)
- Evaluate membership initiatives. Success will be proven by the following factors:
 - Member retention rates remain the same or increase
 - Dollars received from member upgrades outpace downgrades for net dollar growth
 - Number of new members increase
 - Average gift amount increases
 - Dollars received from new members outpace natural attrition for net dollar growth
 - Return on investment is appropriate
 - Budgeted membership goals are met or exceeded

3.3 Earned Revenue – Contracted Services to Others

SCA has expertise that could be sold (contracted) to others. We understand that SCA is about to, or has started discussions with the town about organizing their summer concert series. Additional opportunities should be explored such as concert or festivals at Kissing Bridge Ski Resort - 8 miles away, or Griffis Sculpture Park - 16 miles away.

Recommendations:

- Prepare a list of the program services that SCA can offer organizations/agencies, understanding that contracting events takes staff time (or contract help). SCA's staff have to be selective on which events to take-on to ensure that the investment of staff time will not compromise SCA's core programs or result in "mission creep."
- Explore contracting programming services to the Village such as summer youth programs, entertainment to holiday celebrations, subcontracting artists to design and install holiday decorations, etc.
- Explore contracting programming services to organizations providing area veteran services (Springville Satellite Clinic of Lackawanna VA Outpatient Clinic, 15 Commerce Drive, Springville, NY 14141). Art programs are an excellent alternative strategy for vets receiving mental health services. A model program can be researched at Daemen College, Amherst NY.
- Continue to explore contracting program services to local schools that may be interested in renting performance space, exhibition space, and/or hosting various programs that support school needs.
- Explore bringing programming to the local senior centers for example, The Concord Senior Center (40 Commerce Dr, Springville, NY 14141).

- Consider consulting in the private sector, again without compromising core SCA services and other institutional management needs and organizational priorities. This service offering could include arranging entertainment for house parties and children's events, arranging corporate special events, managing art commissions to identify corporations with their brand, etc. This may require the creation of a separate LLC whose profits would support the SCA.

3.4 Earned Revenue – Ticket/Workshop/Class Sales Revenue

Ticket sales, workshops, and class sales revenue appears to be a very good contributing line to organizational sustainability. Programs that meet audience needs and are consistent with the organization's mission should continue and be expanded if possible.

Recommendations:

- Explore organizing more presentations (concerts, maybe dance or even cinema) which may have the most room for growth and the most capacity to pull audience from a wider geographic area.
- Continue the effort to raise the quality of workshops, camps and classes (for kids and adults, and in particular youth) as this connects SCA most easily to new potential supporters. We don't have the capacity to add totally new programming (don't forget about what will be happening in the cafe space) but do have lots of potential to raise money to really bolster our summer intern program offerings as well as work with schools and school year youth offerings.
- Consider instituting minor annual increases to workshop, and class fees and performance tickets.
- Consider getting businesses and WNY corporations outside the immediate area to sponsor seasonal classes and theater productions.

3.5 Earned revenue - Sponsorship

Sponsorship is an area with significant revenue growth potential. Sponsorships can help maintain strong, positive relations with area businesses and corporations. It will also help to attract new volunteers from business. Companies such as Lawley, Ingram Micro, GEICO, etc. have policies about staff volunteer involvement. There may be others in the immediate area. Appendix A identifies some of the area's businesses that could sponsor events, programs, publications, etc.

Recommendation:

- Cultivation activities should be expanded with the aim of attracting new partners that bring in new income. The following process should be incorporated into SCA's annual operations:

Recommendations regarding growing SCA sponsorship program:

- The Chairperson and the ED should determine the most effective committee structure to engage new business partners. The members of the Board may fulfil the duties of a future sponsorship committee that would concentrate solely on sponsorship and involve others from the community.

- Identify business prospects in the region and the individuals that are their decision-makers and leaders.
- Conduct relationship mapping identifying the strongest relationship between SCA's trustees/volunteers and the individuals and businesses on the prospect list.
- Create standard corporate sponsorship giving levels and benefits to keep benefits and benefit values consistent for every sponsor. Create annual goals.
- Create a sponsorship packet to use as a guide when meeting face-to-face with existing sponsors and new prospects to help make sponsorship options, giving levels and very clear benefits.
- Track all "moves" in the database to use for strategic planning and effective gift cultivation and stewardship.

Future Considerations:

- Create new small business solicitation piece consisting of an information brochure and letter that offer both a membership option and a philanthropic donation option.
- Send direct mail piece and track results.
- Use the Small Business Appeal to obtain new donors that can be "moved" to higher levels of giving over time.

3.5.1 Earned revenue - Cultivating Sponsors

Cultivation of new prospective donors and supporters is an ongoing and necessary activity for not-for-profit organizations.

Recommendation:

- Commence a cultivation program that involves the trustee or volunteer who has strongest relationship, reaching out to the potential prospect and inviting him/her and their spouse to a concert or theater production. Be persistent by email, mail and phone.
- After the production, send a thank you note.
- Include the prospect and/or business on future mailings that provide information on the activities of the organization.
- Add the prospect to the year-end appeal with a personal note from the trustee or volunteer that hosted them. Should the prospect make a contribution, a personal thank you should be sent from the SCA contact that opened the door.
- Another free invitation should be extended to a subsequent event. If the person being cultivated is unavailable, extend the invitation to one of his/her employees.
- Include all relevant cultivation information in SCA donor database.

4.0 Contributed Revenue

Contributed Revenue (CR) represents philanthropic donations to the organization. This is not "Earned" revenue such as tickets to special events, sponsorships purchased for advertising, or workshop fees. CR is pure philanthropic giving. These would include YEA donations, estate gifts, etc.

4.1 Contributed Revenue - The Year-End Appeal

The letters from the 2017 and 2018 YEA were reviewed. The 2017 letter could have been more engaging by focusing on several subjects that may have resonated more strongly than opera. Though opera was unique offering, more people would support an organization that makes a bigger impact on the larger community.

Recommendations:

- Use language in appeals that relates to a wider audience such as the following examples:
 - “Springville Center for the Arts adds vibrancy to our community and region.”
 - “SCA (use full name) creates opportunities for young people in the area.”
 - “SCA has and will continue to invest in the Village and the area.”
 - “SCA continues to provide programs and activities that bring the community together.”
 - “SCA brings unique programs to the area such as opera, to engage students in theater productions,
 - “SCA contributes to the economic growth and vitality of the area by initiating capital projects that hire construction workers who eventually spend their money in restaurants and cafés and buy local goods.”
- The YEA letter should highlight (in bullets) SCA’s overall accomplishments for the year such as:
 - Number of people who attended
 - Number of services provided
 - Number of students who benefitted from classes/workshops
 - Any scholarships/free services provided to underserved populations Capital updates
 - Benefits to community (economic impact)
- Use the word “you” (in referring to the recipient of the letter), as many times as possible in the letter to emphasize the value that SCA brings to the reader.
- Continue to engage the board in writing notes on YEA letters to people that they know. This can be done at a “Sip and Sign” event at the beginning of December where trustees, enjoy a glass of wine, and personally sign letters to those they know.
- YEA acknowledgement (thank you) letters should go out in January. The ED should personally call donors who have given at least a three-figure gift to the organization (this may be already a practice of SCA). If personal contact is not made, he/she should leave a message of thanks and should offer the donor the opportunity to contact him with questions.
- The database should be maintained so that accurate donor information is always available regarding their involvement and what they have supported - including YEA and past capital gifts.
- Mine data to identify existing donor giving capacity, inclination to give, and linkage (relationships to the organization). Categorize donors based on data modeling to customize solicitations to increase loyalty, connection and ultimately gift size. For example: (giving range listed below can be adjusted)
 - Donors with lower level gifts (\$1-\$199) and less capacity to give at higher levels will receive a YEA direct mail solicitation.
 - Donors with mid-level gifts (\$200-\$349) and more capacity to give at higher levels will receive a YEA direct mail solicitation with a phone follow-up (from a volunteer).

- Donors with the highest-level gifts (\$350+) and the most capacity to give will be contacted by a member of the development committee, board and/or staff (depending on relationship) and a face-to-face meeting will be scheduled thank them and to discuss increasing their giving level if the timing is appropriate.
- Focus on “behind the scenes” solicitation message identifying the small percentage of operating costs that donations actually cover.
- Include a targeted donation increase ask in each letter. This can be done automatically if a firm such as Marketing Tech is used.
- Consider offering existing donors an incentive for an increased gift (I.e. WBFO)

Donor Acquisition Recommendations:

- Improve name/contact information capture during performances and solicit new prospects for YEA.
- Offer a “new donor” incentive with prospect mailings.

Additional Improvements:

- Update donation information on website to better educate donors and prospects and make it simple to give electronically.
- Encourage all donors to sign-up for e-blasts to easily keep up-to-date with SCA’s happenings.
- Create an e-mail campaign to current donors with a “forward to a friend” request.
- Create a self-mailer donation envelope to use as a return piece with direct mail - also to use at performances and events to capture contact information with gifts/memberships.
- Promote gifts in Honor and Memory of loved ones.
- Secure a matching grant to use in solicitations. (I.e. WBFO)
- Emphasize the benefits of Recurring Monthly Donations (a donor can pledge a larger annual amount when only a small amount is charged to a credit card each month).

Future Consideration:

- Research companies that specialize in donor acquisition.
- Segment donors into specific groups (i.e. volunteers, concert attendees, theatre attendees, etc.) and customize the mailing theme to suit their interests.
- Make contact with similar local non-profits to request a list trade of comparable donors – send a solicitation for donations.
- Survey lapsed donors with a phone call from a volunteer to determine why they no longer give and encourage them to give again (offer a special incentive).
- Evaluation - success will be proven by the following factors:
 - Donor retention rates remain the same or increase
 - Dollars received from donor upgrades outpace downgrades for net dollar growth.
 - Number of new donors increase
 - Average gift amount increases
 - Dollars received from new donors outpace natural attrition for net dollar growth Return on investment is appropriate
 - Budgeted goals are met or exceeded

4.2 Contributed Revenue - Unexpected Donations

SCA may on occasion receive an unexpected donation from a benefactor. It is important that people know that SCA accepts large, one-time gifts.

Recommendations:

- Establish a “Benefactors Society” separate from a Capital Campaign supporters.
- Recognize these donors on a separate plaque/new letter section/website tab.
- Establish a threshold of \$5,000 with other recognition category increments above the threshold amount.
- Ask the donor whether he/she wishes to be recognized either by name or recognizing the gift as anonymous.
- Make sure to publicly acknowledge the donation and Society.

4.3 Contributed Revenue – Endowment Fund

SCA should **not** start an endowment fund at this time. The organization’s priorities must be to fulfil its capital commitments; maintaining good faith with existing donors and government agencies. As much as completing the capital projects is a priority, so is initiating an annual operating fundraising plan that will be managed and expanded to meet the real needs of the organization, increase its capacity and eventually ensure its sustainability.

Recommendation:

- Begin an endowment campaign once capital projects are completed, and the organization is on strong financial footing with enough revenue to meet ongoing operational needs.

4.4 Planned Giving

Planned giving should be a part of every not-for-profit fundraising plan. This can be achieved with little up-front investment.

Recommendations:

- Aim at establishing an endowment which would be set up to accept planned gift.
- Promote estate legacy gifts in pamphlets, newsletters and on the organization website.
- Find a lead donor that is willing to provide a testimonial.

5.0 Foundation Grants

Grants from foundations are often aimed at capital projects or special programs, not directed at ongoing activities of the organization. There are some exceptions, as there are many foundations and agencies in WNY besides those that already support SCA (See Appendix B.)

SCA has already developed relationships with many of these foundations. These relationships should be maintained and strengthened. The ED should know that foundation staff also want to hear from SCA’s

volunteer leadership and learn about their commitment and why the organization is essential to Springville and the surrounding area.

Recommendations:

- The ED should foster strong relationships with the staff of foundations.
- The ED should include a SCA's Board member in these meetings.

The guidelines that foundations post do not always convey the full scope of their funding interest and breadth. Initiating a conversation on the best way a foundation can support SCA will ultimately lead to larger and longer-term grants. Examples of the types of funding that's available include support programs for veterans, children's access to the arts, and capacity building – an area that would help SCA pay for a new development officer, or special events coordinator.

- Prepare an application to the Kresge Foundation. The Kresge Foundation supports institutions that contribute to place making and address social issues. The Foundation also supports broad partnerships that engage diverse communities. SCA uniquely fits into Kresge's criteria. A letter of intent should be completed by contract grant writer who is familiar with Kresge and has a track record of successfully obtaining foundation grants.
- Consider on-going contracted services in the area of Grant Writing.

6.0 Donor Database

SCA has a significant number of very committed donors. In order for SCA to see long-term and even increased contributions from these donors, SCA need to maintain its donor database and develop and implement a "Stewardship Program."

The current donor base has been reviewed and ongoing and significant support from certain donors has been identified. Some of these donors may have only contributed a multi-year capital gift, but capital support can be transitioned to ongoing operational support, if the donor is properly stewarded toward developing a strong, long-term relationship. The following should be part of an ongoing donor recognition/stewardship program.

Stewardship Program Recommendations:

- Create a procedures manual to identify the proper way to maintain good relations with donors. REMEMBER that this is only a guide and should be followed BUT actions need to be "heart-felt."
- Donors want to hear from the ED through formal communications and personal encounters.
- Newsletters from SCA should update the donor with regards to stories about the organization, such as progress on construction projects, announcements of new major donations, and volunteer stories.
- The ED already does, but should continue to provide a personal tour highlighting some of the construction achievements (this may already be taking place) and/or invite a donor to a special event or presentation to be his personal guest(s).

- The ED should find ways to address some of the priorities of the donor, by showcasing certain programs that the donor has expressed interest. This is not to say that programs need to be created to satisfy a donor's need, but to find out how SCA's existing programs satisfy a donor's priorities.

Recommendations:

- Obtain a basic donor database such as Giftworks: www.frontstream.com/giftworks.
- Ensure that SCA's database is accurate and always up-to-date. The database should document meetings with donors, some the donors' personal preferences, the donors' family connections and other personal information such as birthdays, career, marital status, etc.

Certain foundations may invest in a new donor database for SCA, the cost required to migrate existing data, as well as initial staffing to initiate this plan. A foundation may invest if it sees this effort as strengthening the organization's overall capacity to achieve sustainability. Tech Soup is a great resource for non-profits: www.techsoup.org.

7.0 Develop a Stronger More Effective Volunteer Leadership Base

Five board members were interviewed. All cited their deep commitment to SCA with most expressing the desire to be more involved. Some expressed frustration while noting pride in the organization's accomplishments.

Keeping volunteer leaders includes reducing their stress and engaging them more personally. Some board members indicated that financial information should be broken out in categories to make it easier to understand. Another noted that there are often financial surprises and suggested a finance committee should review information in more detail. These real concerns should be acted on.

One board member indicated that the volunteer pool is shrinking and questioned why volunteers are not returning, as well as and why it's difficult to get a chairperson for an event.

A volunteer who was the chair of an event suggested frustration at the lack of support by other volunteers.

A trustee noted that it is a challenge to get volunteers involved in the theater versus the art program.

Though volunteers are recognized at the "Chili Cookoff", volunteers can be highlighted in other ways. These may include the following:

Recommendations:

- Provide trustees with the information/reports that make them more comfortable/self-assured.
- Regularly feature a volunteer in the newsletter telling his or her story.
- Regularly feature volunteer activities on the website.
- Introduce information wall panels in the SCA building to showcase volunteer stories (for example, describe how the mirrors in the lower restroom were fabricated. This will not only

show support for the volunteers' efforts, it may also encourage others to become more involved).

Board members recognize that Tracy is the volunteer coordinator, but they also understand that as she has many other duties, she finds it difficult to address some of the issues listed above.

Encouraging a volunteer to be an effective advocate for the organization is the ED's responsibility. A trustee expressed concern about the community perception that the organization is flush with funds. "We need to clarify our message."

Recommendations:

- Develop talking points to address issues and respond to specific questions
- Trustees should be recognized from the stage at shows, and given the opportunity to share their commitment with audiences and explain why they got (and stayed) involved.

One trustee indicated that she was frustrated that they are called at the last minute to sell tickets to certain events where ticket sales were slow. The same trustee expressed concern about how certain program decisions are made.

Though the ED encourages trustees to introduce new people to SCA, a trustee was not sure if there was follow-up or what the follow-up should be. She also indicated that she does not see how these programs are evaluated. Trustees acknowledge that the organization has a dynamic and committed leader in the ED and a deeply committed by staff, but the volunteers could be better engaged, prepared, and recognized.

Recommendations:

- Add "Strengthening the Volunteers Base" to SCA's strategic plan as a key strategic imperative.
- Establish a task force that includes staff members, several trustees, and dedicated volunteers that would look at ways to alleviate frustration, encourage greater engagement, and better recognize volunteer efforts. The task force should report to the board which would then establish policies based on the conclusions.
- Recruiting new volunteers and creating an effective volunteer force demands a lot of effort. Recruiting volunteers includes identifying the organization's volunteer needs, developing solicitation strategies and programs (i.e. listing volunteer opportunities on SCA's website, hosting a volunteer open house, sharing specific needs with board members), interviewing candidates to make sure both the volunteer's expectation and yours can be met, checking volunteers for criminal history especially if they are expected to work with children, orienting them to the organization so they can speak confidently and accurately, and training them for the specific job.

A comprehensive volunteer program is an investment in time and money. SCA is a modest sized organization where staff are already spread thin. A PT volunteer coordinator may be another area where a foundation may invest in capacity building at SCA.

- Consider on-going contracted services in the areas of Board Development. Take advantage of CharitySTRONG's resources.

8.0 Social Media

The ED reported that over the past year SCA communicated with its members/donors in a number of ways.

By mail 2 or 3 times,

By 4 newsletters,

20 email blasts, (unknown the number of recipients)

52 Facebook updates (no information on outside hits on SCA's Facebook page.)

TP+A have not accessed the effectiveness of these contacts. A number of recommendations have been made already in the body of this report such as keeping the website updated, posting specific requests for operational support, developing a "please forward to a friend" message on SCA's Facebook page, etc.

Recommendations:

- In conjunction with the members/donors' survey recommended in 1.2, develop specific messaging (SCA brand identification) for user groups that 1) engage in specific programs and 2) are age range identified.
- Contract a social media marketing firm to develop a plan for SCA.
- Make social media a responsibility of a specific staff member at SCA.

Appendix A and B on following pages

Appendix A

Partial list of area businesses

Ace Hardware

Advance Auto Parts

Advance Auto Parts

Aldi's

Automatic Touch-free Carwash

Chevalier Outdoor Living

Chiropractic Care

Community Bank

Concord Mechanical

Cozy Corner

Doug's Value Hardware

Emerling Auto Dealer

H&R Block

Hanna Real estate

Herdon's Outdoor Power Equipment

Hunt Real estate

Jenn Construction

Jim Murphy Chevrolet

Lamb and Webster Inc.

M&T Bank

Mark's Country Store

marks country store

Munro Muffler

Northeast Cycle

Ross Eye Institute

S&S Tax

Slippy's collision
South Town Tireway
Springville Counseling
Springville Dentistry
Springville OBGYN
State Farm Insurance
Tops Market
Trading Post
TSC Tractor Supply Co.
United Materials
USA Real estate
Village Optical
Wendell Inc.
Winsmith Pearless

A more comprehensive list of area business can be found at <http://springvillechamber.com/members/>

Appendix B

Foundations and agencies that currently fund the organization include the following:

M&T Bank Charitable Foundation
Allstate Foundation
Community Foundation for Greater Buffalo
Springville-Griffith Community Education Foundation
Give for Greatness
Fund for the Arts
The John R. Oishei Foundation
Cullen Foundation
Baird Foundation

WNY Foundation

Ralph C. Wilson Jr. Legacy Funds at the Community Foundation for Greater Buffalo

Springville Youth Incorporated

NYS Parks Environmental Protection Fund

NYS Homes and Community Renewal

Empire State Development

Environmental Facilities Corporation

Village of Springville NY Main Program; as well as public funds provided by the

County of Erie and New York State Council on the Arts

Report