

ATOS MID-YEAR COMMITTEE/TASK FORCE/OFFICER ACTIVITY REPORT FORM (2016)

Name of Activity: FUNDRAISING
(Please fill out separate form for each activity.)

Committee Chair/Officer Name: KEN DOUBLE

Date of Report: Feb 4, 2016

1. Actions completed since the 2015 Annual Meeting: (Please bullet actions completed.)

- Ongoing travels and meetings with potential donors (see travel/expense report)
- Have compiled a list of now 48 individual names that are either significant donors (\$1,000 or more for more than one year), estate plan givers, individuals I've met in person, or those expressing interest
- Prepared and distributed the Annual Drive materials on time
- Annual Drive donations to-date: \$25,900 (represents approx. \$3,000 above average)
- Two donors who have given in the past are delaying their gifts until April – this year's gift approx. \$18,000
- Including Annual Drive and membership add-ons, ATOS has had approx. 460 members make a donation. That is just over 20% participation which is remarkable
- As of 2/3/16, we have written contact from one of the above individuals indicating forthcoming annual gifts in an amount to reach six figures – gifts scheduled for 3rd-to-4th quarter 2016 and annually after that
- Prepared draft of 10-minute video fund-raising message to be distributed first to these 48 individuals, then screened at the convention

2. Actions begun but incomplete since the 2015 Annual Meeting: (Please bullet actions begun.)

- Complete script with suggested, appropriate edits
- Complete work with videographer/editor Rick Clear on securing appropriate video components to include
- Secure date at the Atl Fox or Alabama Theatre (Birmingham) to record on-camera parts and narration
- Continue travels and in-person meetings
- Make use of this announcement of the major gift as impetus to secure at least two more gifts of \$25k or more
- Distribute the DVD video to these initial 48, and follow up on discussions and meetings as appropriate
- Set an appt. with Jasper Sanfillipo and officials at his Foundation. We can now confidently approach him (and other foundations) with our plans, and discuss events, gifts, and other means of support
- Related note: a Barrington, IL magazine did a recent profile piece on the family and the foundation that also helps provide the opportunity for this contact.

3. Goals to be reached by the 2016 Annual Meeting: (Please bullet goals.)

- Report on completed fund-raising activities and all gifts up to the annual meeting
- Secure a minimum of two more major gifts (\$25k or more) for this fiscal year (capitalizing on the momentum of the announcement)
- Continue to add to the names to the list of 48
- Complete the video piece, distribute to individuals, screen the video at the convention, and post the video online

4. Amount budgeted for your committee: \$5200

Amount expended by your committee: \$3625.33 (as per Norma Smith)

5. Comments: (Any bulleted special notations, problems, or suggestions should be included here.)

- There will be time for discussion and edit on the video project script before production begins

- The Fundraising effort is cumulative. And the serious push forward was contingent upon the Retreat activity being positive...the message being delivered....and at least one or two major gifts being announced to get the dominos falling. We are now to the point where this activity can truly begin as a public effort, instead of the “quiet campaign.” The video will be the first step in the new public campaign. Next year’s effort will include a more formal brochure for followup materials.
- My reports include the video script, and a proposed road map ahead, including a call for a major capital campaign. This plan/program for board deliberations and discussion going forward.

6. Please provide a three-bullet summary of your committee/task force/officer activities since the 2014 Annual Meeting. These will be included in the minutes of the mid year meeting.

