California Lutheran University

CENTER FOR NONPROFIT LEADERSHIP

Major Gifts / Development Workgroup
November 2, 2016
Meeting Notes

1. Year End Strategy
    a. Kate/Dena to finalize list on Monday, November 7
    b. Submit to Stacy/Advancement for vetting, gift history and mailing addresses
    c. Dena to draft YE letter to select recipients signed by Kate/Dena (due to Kate/Stacy by November 11)
    d. Mail letter no later than November 21
2. Prospect and Target List
    a. Submission Calendar - *Drafted*
    b. Prospects:
        i. Montecito Bank & Trust
            - Draft proposal December, include a regional approach
            - Determine the team to make meet with Mr. Towbes (Chris Kimball)
        ii. Weingart Foundation
            - Dena to check in with Emilie Neumann regarding focus and gift target
            - Draft LOI with full proposal upon invitation
        iii. McCune Foundation
            - Kate & Dena to follow up with lunch invitation to Claudia Armann
        iv. Calendar the following prospects in 2017
            - Towbes Foundation
            - McCune Foundation
            - Bank of America Charitable Foundation
            - Wells Fargo Foundation
3. Workgroup member recruitment
    a. Kate to approach Becca Merrell, Gail Weller Brown and Sue Chadwick to serve on committee
4. Next Steps & Deadlines
    a. Set next meeting date (TBD)

California Lutheran University

CENTER FOR NONPROFIT LEADERSHIP

Foundation / Corporate Sponsorships
Prospect List and Submission Calendar

REVENUE TARGETS	BUDGET	YTD
Membership Income	$38,500	$10,650
Consulting Income	$15,000	$8,000
Workshop Registration	$60,000	$2,425
Individual Donors	$15,000	-
Corporate Sponsors	$20,000	$17,578
Foundation Support	$90,000	-
	$238,500	**$38,653**
Month	**Target**	**Actual**
September		
Launch Event – Netzel Grigsby Associates		$500
Launch Event – Montecito Bank & Trust		$1,500
NPLC Lunch Sponsor – Interface Children & Family Services		$163.77
NPLC Lunch Sponsor – Suzanne Elliott		163.77
Application to Ventura County Credit Union Foundation	$5,000	*declined*
October		
Conejo Estate Planning Council		$3,500
FCOP		$2,500
HCVT		$2,500
Rabobank		$2,000
Wells Fargo		$3,000
Union Bank		$1,500
General Appeal – Rod Gilbert	$10,000/5 years	
November		
NPLC Lunch Sponsor – Kate McLean & Steve Stone		$250
December		
DAF & Major Gifts Strategy (prospects & strategy TBD)		
January		
LOI to Weingart Foundation	focus & target TBD	
Sherwood Cares	$10,000	
Organizational Membership Strategy Launch		
NPLC Lunch Sponsor – Mutual of America	$500	
Wells Fargo Appeal	$10,000	
February		
March		
NPLC Lunch Sponsor – Blackbaud Analytics	$500	
April		
May		
June		
Wood-Claeyssens Foundation (due June 30)	$10,000	
July		
August		
September		
Smith Hobson Foundation (September 30)	$5,000	

To be scheduled: Bank of America, McCune Foundation, Towbes Foundation (if appropriate)