



**School for Advanced Research
Development Committee Meeting**
August 4, 2017, 1:30-3:00 pm
Dobkin Boardroom
Agenda

- Review and Approve Minutes from July 11, 2017
- Review and Approve the Gift Acceptance Policy
- Review and Approve the FY18 Development Plan
- Discussion of Creative Thought Forum and Founders' Society
- New Business

Upcoming Development Committee Meetings (First Tuesday of the Month):

- Tuesday, September 5th, 1:30pm - 3:00pm
- Tuesday, October 3rd, 1:30pm - 3:00pm
- Tuesday, November 7th, 1:30pm - 3:00pm
- Tuesday, December 5th, 1:30pm - 3:00pm
- Tuesday, January 2nd, 1:30pm - 3:00pm
- Tuesday, February 6th, 1:30pm - 3:00pm
- Tuesday, March 6th, 1:30pm - 3:00pm
- Tuesday, April 3rd, 1:30pm - 3:00pm
- Tuesday, May 1st, 1:30pm - 3:00pm
- Tuesday, June 5th, 1:30pm - 3:00pm



**School for Advanced Research
Development Committee Meeting
July 11, 2017, 1:30-3:00 pm
Reception Center Meeting Room
Minutes**

Attendees: Julie Rivers, Committee Chair, Dorothy Bracey, Joe Colvin, Ken Stilwell, Meg Lamme (via phone), Elizabeth Roghair (via phone),

Staff: Michael Brown, President, Laura Sullivan, Dir. of Development, Lindsay Archuleta, Donor Relation Manager, Suzanne Grayson, Executive Asst. to the President

Not in attendance: Wes Cowan, Susan Foote, Angela Gonzales, Sharon Tison, VP for Finance and Administration

- I. Review and Approve Minutes from June 6, 2017
Julie Rivers motioned to approve the minutes. Moved by Joe Colvin, and seconded by Michael Brown, the minutes were approved as presented.

- II. Review Goals, Grants Status, Membership Report, Business Sponsorships
Laura Sullivan stated that all seven goals had been met for FY2017. Laura announced that SAR is proposing to the Paloheimo Foundation that, if awarded, a portion of the grant go toward hiring 66&Co., a communications and PR firm. There was a consensus for the need to raise SAR's profile nationally. She gave updates on other grants including McCune Foundation and the SF Arts Commission. She reviewed the list of business sponsors for FY18. There was a suggestion to approach the Texas-based restaurant group that purchased several Santa Fe restaurants. Laura will schedule a meeting with Pat Murray for business networking purposes.

- III. Review Appeals Report YTD/Stewardship
Laura announced that SAR exceeded total raised goal: raised \$947K toward the \$945K unrestricted goal and toasted the committee's work. Of the \$945k raised, \$822k will be applied to the FY18 operating budget.

- IV. Events Report:
 - a. *What's Your Treasure Worth?* Event(s), June 23-24
Lindsay Archuleta stated that both weekend events netted \$50,773.

V. Founders' Society Activities- Need to Plan for the Year

Laura Sullivan reminded the committee that these \$5K memberships will fall under the PC category. Michael Brown stated that members will receive priority for attending the six Salons which are scheduled. There was a suggestion to hold an annual Founders' Society dinner. There was also a suggestion to host a members' lunch to brainstorm planning and benefit ideas; perhaps on September 15 in conjunction with the next salon.

VI. Gift Acceptance Policies Review

Laura Sullivan stated she had met with Elizabeth Roghair and Nancy Bern to revise this document. There was a suggestion to add an appendix with definitions. There was input to revise sections, specifically regarding turnaround times, named funds, the definition of "bargain sale", variance power, language pertaining to confidentiality as well as life insurance policies. Julie Rivers would like any committee edits on the policies section to be sent to Laura before July 14. Julie, Laura and Lindsay will review before a final draft plan is distributed to the development committee on July 21. Any final revisions will be ratified for board approval on August 5 as part of the board meeting consent agenda.

VII. Board Meeting Planning for Development Committee

- a. Review of Development Plan for FY17-18 at August 4th meeting

VIII. New Business

There was a question about whether Doug Schwartz left a legacy gift. Laura Sullivan stated she recently spoke to Nita Schwartz who stated there was no evidence that Doug indicated a legacy gift to SAR.

Laura Sullivan distributed member survey results and asked for feedback. She announced Eric Dobkin will be signing copies of his book at SAR on August 17 and at the Antique American Indian Art Show and offered free passes to all committee and board members.

IX. Adjourn

With no further business, Julie Rivers adjourned the meeting at 3:11pm.

Upcoming Development Committee Meetings (First Tuesday of the Month):

- Friday, August 4th, 1:30pm - 3:00pm (in conjunction with August Board meeting)

(7/25/17)

**SCHOOL FOR ADVANCED RESEARCH
DEVELOPMENT PLAN AND GOALS, FY2017-18**

	Goals
Goal 1	Build capacity of staff for maximum fundraising success.
Goal 2	Increase fundraising results for annual fund.
Goal 3	Strengthen major gifts and planning giving program.
Goal 4	Increase membership in SAR and sponsorship of public programs.
Goal 5	Support the role of the Board in fundraising.
Goal 6	Heighten profile and public awareness of SAR and its importance.
Goal 7	Increase support from national foundations and corporations.

Marked in yellow are substantive changes from FY2016-17

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Goals, Objectives, and Tasks	
Goal 1	Build capacity of staff for maximum fundraising success.
Objective	1.1 Work with current staff to find the strengths and areas of improvement for each employee.
Tasks	<ul style="list-style-type: none">• Meet with each staff member to review their current job description/ tasks and reassign tasks as needed.• Continue to implement planning tools and systems to help team stay on track and on deadlines.• Ask each staff member to determine annual goals based on overall department goals.
Objective	1.2 Continue optimizing use of RE database (RE NXT) and work to maximize its efficiencies.
Tasks	<ul style="list-style-type: none">• Work on training modules to acquaint ourselves with RE NXT and its functionalities.• Implement best practices when utilize RE NXT for donor relations management, grant tracking, and other fundraising strategies.• Continue to work on gift processing, database procedures, and clean up.• Attend blackbaud's annual conference "bbcon 2017" for latest trainings and information.
Goal 2	Increase fundraising results for annual fund.
Objective	2.1 Create and implement integrated plan for both mail and e-mail appeals for end of year as well as for spring campaigns to reach diverse constituencies and increase numbers of donors as well as amount of donations (4% increase).
Tasks	<ul style="list-style-type: none">• Develop print materials for mailings including fundraising letters, reply forms and brochures relaying information about the importance of SAR.• Design effective e-mail campaigns to increase on-line giving.• Create brief videos to enhance the "storytelling" aspect of SAR and the impact of the School on scholars, artists, and members.• Review levels of giving and giving opportunities.• Coordinate annual giving campaign with membership drive(s).• Segment constituencies and target appeals according to interests and relationships to SAR.• Generate targeted mailing lists customized to each identified constituent.
Objective	2.2 Use the case for support to help in fundraising activities.
Tasks	<ul style="list-style-type: none">• Work with staff and Board to engage prospects in understanding the importance of SAR and its impact. What are the tangible results/ impact of its work?• Work with Communications Coordinator, graphic designer, and web designer to communicate case for support and reinforce the theme of the annual appeal through print and digital media.• Integrate efforts across departments, so all staff are involved in using the case for support in their work.
Objective	2.3 Expand alumni giving program by 14%.
Tasks	<ul style="list-style-type: none">• Enlist help from Dir. of Scholar Programs and IARC to work on strategies to engage alumni in supporting SAR.• Involve scholars/artists while they are at SAR to consider ways of supporting SAR.• Clean up database and update contact information and accomplishments of alumni.

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	<ul style="list-style-type: none">• Communicate with alumni on a more regular basis with targeted messaging.• Determine benefits for alumni giving and ways to keep alumni engaged in SAR activities.• Create area on website and/or use social media channels to report alumni successes and achievements.• Form alumni leadership group to help with planning alumni events and strategies to keep alumni engaged.
Objective	2.4 Expand annual giving through fundraising events.
Tasks	<ul style="list-style-type: none">• Plan and implement event in conjunction with IARC 40th Anniversary to raise funds for IARC operations and programs.• Seek sponsors for 40th Anniversary event (see Goal 4).• Plan and implement 3rd annual Collections of Distinction event for July 2018 (this also serves as a cultivation event for major gifts).
Goal 3	Strengthen major gifts program.
Objective	3.1 Identify top prospects and develop individualized strategies to cultivate and solicit major gifts (\$2,500+).
Tasks	<ul style="list-style-type: none">• Work with President, Board Chair, and Development Committee to identify and solicit new and current prospects, including 5 new President's Circle members.• Solicit support for Founders' Society to support Creative Thought Forum, 5 new donors @ \$5,000 ea.• Review lists and make assignments for solicitations.• Research prospects to determine projected levels of giving and prepare background information for solicitors.• Conduct training as needed for solicitors.• Conduct the asks and report back on results to Director of Development.• Record results and next steps in RE database- track "moves management"• Solicit gifts in one on one solicitations, including donations from cultivation events.
Objective	3.2 Continue to increase membership in El Delirio Legacy Circle.
Tasks	<ul style="list-style-type: none">• Review El Delirio program and review list of current members.• Develop ideas to enlist new participants in the program, starting with board members. Consider volunteers, docents, retirees as well as current donors.• Review current print materials and develop new materials as needed.• Make sure that all current members of El Delirio are invited to all President's Circle events.• Enlist at least 10 strong prospects and 2-3 new members.• Provide a variety of options for donors to include SAR in their estate plans, including bequests, life income gifts, life insurance, and IRA distributions.
Objective	3.3 Plan events to help steward current major donors and cultivate new major gift and board prospects.
Tasks	<ul style="list-style-type: none">• Work with Chair of President's Circle, Board Chair, and other interested Board members to plan and implement compelling and intimate events that engage major donors and entice new donors to give at leadership levels, including joining the newly formed Founders' Society for the Creative Thought Forum.

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	<ul style="list-style-type: none">• Offer exclusive invitations for major donors to intimate events at SAR and at private homes that give prospects and donors an “insiders” view and special access to scholars and Native American artists.• Enlist Board and current donors to invite prospects to join them at those exclusive events and to give at leadership levels.• Follow up on events to assure for maximum opportunities for prospects to give at leadership levels and for current donors to increase their levels of support.• Continue to work with Director of IARC and Scholar Programs to identify individual [and/or business] prospects and work on strategies for cultivation and stewardship.
Objective	3.4 Work with leadership team on campus master plan.
Tasks	<ul style="list-style-type: none">• Determine priority needs for current campus improvements and associated costs.• Develop strategies, including naming opportunities, to increase funding for current campus maintenance and repairs.• Work with master planning team to determine needs for campus expansion and growth of IARC and develop fundraising strategies to promote the project.• Begin process for campaign strategy planning for capital/ endowment campaign (solicit proposals from fundraising consultants)
Goal 4	Increase membership in SAR and sponsorship of Member programs.
Objective	4.1 Maintain quality programs for members including lectures, field trips, classes, campus tours, discounts, etc.
Tasks	<ul style="list-style-type: none">• Continue to plan and implement best programs possible for members by selecting engaging speakers, posting timely announcements, and planning carefully for the implementation of member programs.• Work with contractors, volunteers, and speakers to assure for smooth delivery of programs.• Work as liaison to trip operators by coordinating planning, marketing, and logistics for member field trips.
Objective	4.2 Improve recruitment strategies and attract new members, increase by 10%.
Tasks	<ul style="list-style-type: none">• Maintain lists and attendance records of those who attend SAR events and tours.• Send follow up correspondence to attendees to thank current members and to invite non-members to join.• Add names of prospects from staff and Board to database as appropriate.• Develop and implement strategies to recruit new members.
Objective	4.3 Increase level of support from business sponsors to support membership programs and sponsor events.
Tasks	<ul style="list-style-type: none">• Consult and work with the Development Committee/ Board of Directors to help identify top prospects for sponsorships and solicit new business sponsors.• Provide solicitors with appropriate materials and training to request sponsorships.• Record activities of the solicitors in RE so that activities can be tracked and managed.• Review with VP of Finance and Administration list of vendors. Approach vendor representatives as individual prospects.

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Objective	4.4 Continue to offer high quality programs for the general public to attract new audiences to SAR.
Tasks	<ul style="list-style-type: none">• Identify topics of interest and instructors/ speakers who can address those topics to the general public relating to art, culture, and history of the Southwest and to the field of anthropology at large.• Plan a reasonable schedule of events and marketing plan to promote events and bring attention to the topics and to SAR.• Follow up with event attendees to invite them to become members and get involved with SAR activities.• Continue to offer adult education classes relating to subjects of specialization to SAR, including SW studies and cultural anthropology.• Add Scholar Salons as a component of the Public Lecture series to give members (\$500+) an opportunity to participate in more in-depth conversations and experiences with SAR scholars and artists.
Objective	4.5 Better understand audience(s) and impact of SAR.
Tasks	<ul style="list-style-type: none">• Conduct survey of members/constituents in database to determine their level of interest in SAR and the types of programs they enjoy as well as communications and content they appreciate receiving.• Collect data at SAR events/ tours when possible to capture demographic information.• Conduct interviews and research on SAR alumni and continue to work on documenting the impact SAR has had on their careers and communities.
Goal 5	Support the role of the Board in fundraising.
Objectives	5.1 Continue to involve Board in major and planned giving/ legacy program.
Tasks	<ul style="list-style-type: none">• Conduct Board solicitation as part of major gift program, including planned giving. Obtain board commitments for following year budget by December 2017 to be received by 6/30/18.• Invite select Board members to make additional targeted gifts over and above their basic annual gift and join the Founders' Society to gain more benefits from their involvement.• Involve Board in planned giving program by inviting their participation to invite friends and colleagues to events and providing pertinent information for prospects to consider.• Invite Board to continue to provide names of prospects to approach for major gifts.• Involve Board members as ambassadors when asking prospects for a gift.• Communicate regularly with former board members and invite their participation and continued/resumed giving.
Objectives	5.2 Work with Board Nominating Committee to identify new Board prospects.
Tasks	<ul style="list-style-type: none">• Make lists of potential new Board members based on a set of established criteria.• Work with Governance Committee to conduct Board asset mapping to determine strengths of current Board members and to help identify needs of the organization and the Board.• Cultivate Board prospects as major gift donors and involve them in SAR related activities.• Prepare orientation for new Board members with a focus on the importance of fundraising as one of their primary areas of responsibility.

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Goal 6	Heighten profile and public awareness of SAR and its importance.
Objectives	6.1 Increase our capacity to communicate the work of SAR to existing and emerging constituencies on a local, regional, and national level to advance our mission and enhance donor and alumni relations.
Tasks	<ul style="list-style-type: none">• Enlist the services of a professional public relations and marketing firm to consult on improved messaging and communications across multiple platforms.• Evaluate core programs regularly, and when appropriate, use the results for marketing and promotion purposes; disseminate to scholar, artist, indigenous, and public constituencies.• Segment and customize communications to suit the diverse audiences of SAR, including scholars, alumni, artists, and the general public.• Strengthen and maintain relationships with alumni.• Produce bi-annual publication that focuses on feature stories of interest to SAR audiences.
Objectives	6.2 Explore and forge partnerships with related organizations to enhance programming and increase visibility of SAR.
Tasks	<ul style="list-style-type: none">• Identify opportunities for conducting programming outside SAR to increase SAR's visibility with new audiences.• Explore alliances with other cultural/ research institutions for joint programming options to expand audiences, including Creative Santa Fe and the Museum of New Mexico.• Work with the New Mexico Museum of Art on programs and marketing relating to the 100th anniversary of the Museum and 40th anniversary of IARC.
Objectives	6.3 Build on existing relations and communications with local newspapers and magazines.
Tasks	<ul style="list-style-type: none">• Maintain media list focusing on newspaper, TV, radio, magazines, etc. and maintain contact with media with stories of special interest.• Pitch story ideas of interest directly to editors.• Have staff be interviewed, according to board policies, and make public appearances where media are present.• Prepare information packets and deliver to members of the press, as appropriate.• Write and deliver press releases on important events, activities, and accomplishments of people involved with SAR.
Objectives	6.4 Improve social media activity to increase participation.
Tasks	<ul style="list-style-type: none">• Conduct a social media audit to determine current strengths and weaknesses of program.• Implement a plan to increase "likes" on Facebook and "followers" on Twitter and Instagram including on the new Alumni Facebook page.• Maintain and create short video clips on YouTube featuring resident scholars and Native American artist fellows to use for fundraising activities.
Objectives	6.5 Maximize use of new website for more effective communications and online fundraising.
	<ul style="list-style-type: none">• Utilize new website for enhanced communications and fundraising effectiveness.• Utilize best practices when adding content to the web to make sure it is communicating our mission and messaging.• Assure that online giving and signing up for e-news is easy and accessible.• Consider calls to action on the website to involve our constituents.• Keep content fresh and engaging.

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Goal 7	Increase support from national foundations and corporations.
Objectives	7.1 Research and identify at least five new major foundations/ corporations that have an affinity to SAR.
Tasks	<ul style="list-style-type: none">• Utilize FoundationSearch © databases and other tools to conduct research on foundations to identify new prospects that fund projects relating to the social sciences and that have an impact on the human condition, advancing knowledge about social and cultural issues, as well as programs involving Native Americans and outreach to Native communities.• Maintain a grants/ proposal tracking system that identifies deadlines, purpose of grant, any special notes, and reporting requirements.• Select the top prospects and prepare proposals.
Objectives	7.2 Approach top prospects for support.
Tasks	<ul style="list-style-type: none">• Follow up by phone or in person to discuss proposal idea and scope of project.• Write proposals that relate to the missions/ purpose of the “funder” and that meet a need at SAR.• If funded, maintain reporting schedule and coordinate the preparation of reports that are thorough and submitted in a timely manner.• Identify and secure at least 3 new funding sources.

**SAR FUNDRAISING PLAN
FY2018**

7-25-16

Appeal Description	Actuals Cash Paid & Pledged-FY17 for FY18	Goal: FY18 for FY19	Details	Audience	Increase/Decrease	Strategies/ Notes	Timeframe
CONTRIBUTED UNRESTRICTED FUNDS							
FY18 Unsolicited Gifts	\$ 27,606.71	\$ 5,000.00	unexpected bequest		\$ (22,606.71)	Bequests	Entire Fiscal year
FY18 End of Year Direct Mail Appeal	\$ 44,459.13	\$ 45,000.00	115 donors (increase from 109)	LYBUNTS SYBUNTS and Prospects	\$ 540.87	Direct mail solicitations: Follow-up by phone calls.	September-December
FY18 End of Year Email Appeal	\$ 9,010.00	\$ 10,000.00	40 donors (increase from 35)	LYBUNTS SYBUNTS and Prospects	\$ 990.00	3 EOY e-appeals	November-December
FY18 End of Year Direct Mail Appeal Alumni	\$ 5,870.00	\$ 6,000.00	25 donors		\$ 130.00	Targeted focus on alumni	November-December
FY18 End of Year Email Appeal Alumni	\$ 1,985.00	\$ 2,000.00	10 donors		\$ 15.00	Targeted focus on alumni	November-December
FY18 Spring Direct Mail Appeal	\$ 15,100.00	\$ 12,000.00	40 donors		\$ (3,100.00)	Focus on specific project	April-June
FY18 Spring Direct Mail Appeal Alumni	\$ 250.00	\$ 1,000.00	10 donors		\$ 750.00	Targeted focus on alumni	April-June
FY18 Spring Email Appeal	\$ -	\$ 3,000.00	25 donors		\$ 3,000.00	2 e-appeals in spring	April-June
FY18 Spring Email Appeal Alumni	\$ -	\$ 1,000.00	10 donors		\$ 1,000.00	Targeted focus on alumni	April-June
FY18 Fundraising Events	\$ 46,800.00	\$ 25,000.00	1 anchor event in early summer; 2-3 smaller events	Past attendees, Major Gifts Prospects, Current Donors, and LYBUNTS/SYBUNTS of \$250+	\$ (21,800.00)	IARC 40th Anniversary event (net \$10,000); Collections of Distinction event (\$2,500)	TBD
FY18 Schwartz Memorial	\$ 4,790.00	\$ 20,000.00	Goal to raise \$100,000 for Schwartz Memorial Fund (80% to endowment, 20% to operating)		\$ 15,210.00	Public Memorial on 8/27/16; welcome gifts in honor/memory of Doug Schwartz	August-September
FY18 Cultivation Events	\$ 1,650.00	\$ 2,500.00	5 new donors	New Prospects (non-donors), Lapsed donors (more than 3+ years)	\$ 850.00	1-2 cultivation events. Special mailings with invitations; personal invitations by board.	April-June
FY18 Personal Solicitations	\$ 124,375.00	\$ 125,000.00	5 additional new donors, average \$5,000 ea. Implement Founders' Society.	Target 25-50 Major Gifts Prospects	\$ 625.00	Personal cultivation and solicitations by Board and Staff Leadership (including asks of former board)	Entire Fiscal year
FY18 Unrestricted Individual Giving	\$ 22,076.25	\$ 25,000.00			\$ 2,923.75		
FY18 Board Giving	\$ 331,080.00	\$ 375,000.00		Current Board giving at same levels as last year + new board members giving each at least \$10k, as well as targeted additional asks	\$ 43,920.00		Pledges in by Feb.
FY18 Annual Report	\$ 2,500.00	\$ 2,500.00			\$ -		
FY18 Membership	\$ 73,435.00	\$ 80,000.00	9% increase over last year	Current and new prospects	\$ 6,565.00	Collect names at events and tours and follow up with to invite to join, includes business memberships (not sponsorships)	Entire Fiscal year
FY18 President's Circle	\$ 60,156.38	\$ 70,000.00	Net 5 new PC members (this is net of costs)	Board contacts: new prospects; renew current	\$ 9,843.62	Invite new potential members to PC events; recruit during year at other receptions and cultivation events	Entire Fiscal year

**SAR FUNDRAISING PLAN
FY2018**

7-25-16

Appeal Description	Actuals Cash Paid & Pledged-FY17 for FY18	Goal: FY18 for FY19	Details	Audience	Increase/Decrease	Strategies/ Notes	Timeframe
FY18 Unrestricted Grants	\$ 18,500.00	\$ 20,000.00	2-3 new family foundations; Includes SFCF, Newman's Own Foundation, Sydney Stern Memorial Trust, Bunting	New Prospects or lapsed donors (need to reestablish relationship)	\$ 1,500.00	Research prospects, make personal calls/ visits, write proposals, follow up	Entire Fiscal year
FY18 Business Sponsorships	\$ 19,250.00	\$ 20,000.00	2-3 new business sponsors (\$1,000+)	Businesses in Santa Fe and ABQ (include event sponsors)	\$ 750.00	Prepare business sponsor packets, compile list of top prospects, make personal calls to solicit gift; attend Chamber of Commerce events and offer After Hours Reception to recruit new members	Entire Fiscal year; push in the fall and spring (for lecture sponsors for FY18)
TOTAL UNRESTRICTED	\$ 808,893.47	\$ 850,000.00			\$ 41,106.53		
CONTRIBUTED RESTRICTED FUNDS							
FY18 Restricted Grants: ARF	\$ 506,095.00	\$ 527,000.00	Need to request for FY19. We may be allowed to go to 3-year grants; under ARF review with SAR's public support amounts. \$260,000 committed for Intellectual Training (Intern program)		\$ 20,905.00	FY2019 grant proposal ideas to be submitted September 2017; to be reviewed by ARF representatives. FY19 amount is an estimate, except ARF has approved \$260,000 for the Intern grant (+\$20,905)	Entire Fiscal year
FY18 Restricted Grants: Margaret A. Cargill Foundation- Directed CEO	\$ 74,144.00	\$ -	Special grant for Campus Master Plan and MFB to attend CEO non-profit management training program		\$ (74,144.00)		Nov. 2016-March 2018 (18 mos.)
FY18 Restricted Grants: Paloheimo- Annual Report	\$ 35,600.00	\$ 35,600.00	Committed- Year 3 of AR funding		\$ -	Submit request for FY18 in March 2017	
FY18 Restricted Grants: Mill Foundation	\$ 30,000.00	\$ 30,000.00	Need to request additional amount for Scholar Programs for FY19		\$ -	For Scholar Programs	
FY18 Restricted Grants: Lannan Foundation	\$ 14,080.00	\$ 15,000.00	Need to request additional amount for Scholar Programs for FY19		\$ 920.00	For Indigenous Writer-in-Residence	Summer 2018
FY18 Restricted Grants: Frost Foundation	\$ 15,000.00	\$ 25,575.00	Pending for IARC education programs/ staff		\$ 10,575.00	Preliminary proposal for FY2018 submitted; pending invitation for full proposal October 1, 2017	
FY18 Individual Restricted special projects	\$ 20,000.00	\$ 5,000.00	\$5,000 from Betty Vortman for public lecture series; \$15,000 from John Camp for Lencic lecture		\$ (15,000.00)	Restricted- Specific according to project division	Entire Fiscal year
Cordell Prize	\$ -	\$ -			\$ -		
TOTAL RESTRICTED	\$ 694,919.00	\$ 638,175.00			\$ (56,744.00)		
TOTAL CONTRIBUTED UNRESTRICTED + RESTRICTED	\$ 1,503,812.47	\$ 1,488,175.00			\$ (15,637.47)		
CREATIVE THOUGHT FORUM-FY19 ESTIMATED COSTS- ADDITIONAL TO RAISE							
FY18 Creative Thought Forum		\$ 150,000.00			\$ 150,000.00	Need to find donors/ investors to hire staff, implement programs	

**SAR FUNDRAISING PLAN
FY2018**

7-25-16

Appeal Description	Actuals Cash Paid & Pledged-FY17 for FY18	Goal: FY18 for FY19	Details	Audience	Increase/Decrease	Strategies/ Notes	Timeframe
EARNED REVENUE (NET OF COSTS)							
Book sales (net)	\$ 45,397.00	\$ 45,000.00			\$ (397.00)	\$150,572 rev.; \$62,047 cost of books; \$43,129 paid to UNM	
Rent income	\$ 34,259.00	\$ 35,000.00			\$ 741.00		
Field trip revenue	\$ (2,282.00)	\$ -			\$ 2,282.00		
IARC sales and tours; campus tours	\$ 18,746.00	\$ 19,000.00			\$ 254.00		
Lecture Receipts (including cash sales)	\$ 21,685.00	\$ 22,000.00			\$ 315.00		
Class fees	\$ 10,120.00	\$ 5,200.00			\$ (4,920.00)		
TOTAL EARNED	\$ 127,925.00	\$ 126,200.00			\$ 1,725.00		
GRAND TOTAL (Contributed + Earned)	\$ 1,631,737.47	\$ 1,764,375.00			\$ (132,637.53)		
ADDITIONAL BUDGET FUNDING (raised in prior years)							
Endowment Draw	\$ 1,126,776.00	\$ 1,150,000.00	goal is to reduce draw %		\$ 23,224.00		
Bunting funding	\$ 1,200.00	\$ 5,000.00	Amount allocated in FY17 vs. amount requested for FY18		\$ 3,800.00		
Adams fund	\$ -	\$ -			\$ -		
Library book purchase fund	\$ 2,500.00	\$ 2,500.00			\$ -		
Staley reserves	\$ -	\$ -			\$ -		
Mellon for FY18-FY19	\$ 124,150.00	\$ 149,150.00	Committed for Years 2 & 3		\$ (25,000.00)		
NSF for FY17-FY18	\$ 45,467.00	\$ 46,287.00			\$ 820.00		
prior year surplus	\$ 70,000.00				\$ (70,000.00)		
Draw from Reserves	\$ 121,000.00				\$ (121,000.00)		
Dubin for FY18 & FY19	\$ 6,250.00	\$ 6,250.00	Artist Fellow (\$25,000 pledged in 2015)				
Sub Total	\$ 1,497,343.00	\$ 1,359,187.00			\$ (138,156.00)		
TOTAL RAISED for FY18	\$ 3,129,080.47	\$ 3,123,562.00			\$ (5,518.47)		
RAISED IN FY17 FOR FY17/ PROPOSED FOR FY18 FOR FY18							
FY17 Individual Restricted special projects	\$ 5,000.00		From the \$20,000 pledge from S. Foote, \$5,000 was spent on library shelving during FY17. The balance is reflected below to carry forward into future years.			Restricted- Specific according to project division	
FY17-FY18 Restricted Grants: Misc.	\$ 2,000.00	\$ 5,000.00	Proposal pending for IARC Education programs for FY18		\$ 3,000.00	SFCF for Indian Arts- Youth Development Program in FY17	
FY18 Restricted Grants: Paloheimo External Communications	\$ 50,423.00	\$ 75,198.00	Proposal pending- 1 year special request for marketing and communications contractors and materials		\$ 24,775.00	Submitted request for FY 2018-19 on July 15, 2017; board meets in early Oct. 2017	
FY18 Business Sponsorships	\$ 5,748.00	\$ 6,843.00	Proposal pending for Latino Studies lecture for FY18		\$ 1,095.00	Northwestern Mutual for the Latino Scholars Network	
Boardroom Chairs	\$ 10,000.00	\$ -	Gift from Lee Caldwell and Marcus Randolph				
FY18 Restricted Grants: PNM	\$ 5,000.00					1 year grant for LED lighting at IARC	
Sub Total	\$ 73,171.00	\$ 87,041.00					

**SAR FUNDRAISING PLAN
FY2018**

Appeal Description	Actuals Cash Paid & Pledged-FY17 for FY18	Goal: FY18 for FY19	Details	Audience	Increase/Decrease	Strategies/ Notes	Timeframe
Additional revenue raised to be used in future years							
FY17 Individual Restricted special projects	\$ 17,500.00		Includes \$20,000 from S. Foote for designated projects (portion spent on library shelving during FY17) and \$2,500 from Vortman for IARC collections			Restricted- Specific according to project division	
DWS Memorial	\$ 19,160.00		80% of total raised to date (\$23,950) could go into cash reserves or permanent endowment				
S. Feld Bosavi Project	\$ 6,000.00		15% of total revenue goes to SAR (\$40,000)				
Kercheck bequest	\$ 96,000.00		80% of total bequest could go into cash reserves or into permanent endowment				
Campbell Fellowship	\$ 25,000.00		For FY19 Advanced Seminar		\$ (25,000.00)		
Cordell prize		\$ 12,000.00	This was funding raised in prior years.			Fund contains \$52,267 total	
TOTAL RAISED	\$ 315,002.00	\$ 12,000.00					