



**New Talent Fundraising Working Group
Organizational/Planning Meeting
March 15, 2017**

Kiewit Lodge, Mahoney State Park/Conference Call

MEETING SUMMARY

• **Introductions/Goal of Meeting**

Dee Sykora, Foundation president, and **Dave Chastain, Fundraising chairman**, welcomed attendees and presented meeting goal:

To review and recommend fundraising strategies and activities for the coming year, to support the IIAN/Foundation New Talent College program.

Introductions: Attending from IIAN and Foundation Boards, volunteers:

IIAN: **Greg Zimmer** (Vice Pres.), **Sandra Ryks** (Sec.-Treas.), **Cole Williams** (Director), **Zak Morken** (Chairman – Member Engagement Task Force). Unable to attend: **Krae Dutoit** (Pres.)

Foundation: **Dee Sykora** (Pres.), **Jay Sillau** (Vice Pres.), Directors – **Jeff Ewen**, **Jon Hongsermeier**, **Bob Marshall** (Exec. Comm.), Fundraising chair – **Dave Chastain**, Jacupke Tournament Co-chairs – **Mike Glaser** (past IIAN/Foundation president), **Tom Greco** (past IIAN president). Unable to attend: **Barb Dale** (volunteer)

Staff: **Carol McClelland** (CEO, Foundation Sec.-Treas.), **Kelli Backman** (New Talent Program Director), **Jeremiah Gudding** (Marketing Director), **Randa Zalman** (Marketing Consultant)

• **New Talent Program Update**

Kelli Backman, New Talent Program Director, presented a progress report for first two months of program development, and a timeline for future development

- **Working first with Metro Community College, Omaha** and large Omaha agencies to develop a “prototype” program. **Goal:** Place business students graduating this May in jobs and/or summer internships
 - Agency internship guide developed
 - Student-facing marketing materials, web site, videos under development
 - Job placement mechanism under development
- **Timeline:**
 - **June** – Refine program, marketing materials based on Metro CC experience; develop member marketing plan/materials
 - **July/August** – Develop working relationships with selected 2-year and 4-year colleges and area members: Southeast Community College, Hastings University,

Nebraska Wesleyan University, Mid-Plains Community College

- Build member jobs/internship “clearinghouse”

- Market to members – agency visits

- **Sept/Oct/Nov** – Recruiting – matching students with member needs

Goal: January internship placements; job placements for December graduates

- **Income Goals** – Carol McClelland reviewed June, 2016 New Talent Task Force development plan and income/expense projections.

- **Foundation Goals:**

2016-17 Fiscal Year (9/1/16-8/31/17)

- 12-Month Program Expense “Share”: \$40,742 (\$3,395 monthly payment to IIAN)

- 8-monthly payments: \$27,160 (January 1 – August 31, 2017)

- 2016 Jacupke Memorial Golf Tournament netted \$14,700, including \$3,000 NASC sponsorship

- **Foundation can “break even” as of 8/31/17, IF IIAN/Foundation Directors and volunteers continue/renew financial support this summer through Academic Leadership Circle (\$12,000 total contributions)**

2017-18 Fiscal Year (9/1/17-8/31/18)

- 12-Month Program Expense “Share” starting 1/1/18: \$46,346 (\$3,862 monthly payment to IIAN) – Pro-rated: \$44,476

- 4-monthly payments @\$3,395: \$13,580 (September 1 – December 31, 2017)

- 8-monthly payments @\$3,862: \$30,896 (January 1 – August 31, 2018)

- **Review Recommended Fundraising Strategies – Clover’s “Top 4”**

Presentation by Randa Zalman – Insurance Marketing Institute, Omaha
(refer to proposed Action Plan)

- **Go After Large Donations (\$5,000+)**

- Can we make the commitment? **Yes!**

- **Key Points/Take-Aways:**

- Continuing/renewed financial support by IIAN/Foundation Directors/Volunteers is essential (contributions to Academic Leadership Circle)
- **Director/Volunteer Commitment:** Identify potential donors who have capacity to give within their circles of influence – both inside/outside IIAN
- **Mine IIAN Data Base:** Identify largest agency principals, past leaders

- **Jacupke Golf Tournament – October 11, 2017**

- **Key Goal: Maximize Income, build on success** – Develop additional activities/sponsorship opportunities; double golfer numbers

- **Key Points/Take-Aways:**

- Recruit more volunteers – Fundraising, tournament staging/help
- **Director/Volunteer Commitment:**
 - **“Adopt” potential sponsor** (non-IIAN Industry Partner) – pro-actively cultivate and get commitment
 - **Pro-actively promote tournament participation** within their organization and circles of influence
 - **Volunteer** for sub-committees or interest: Fundraising, Tournament Staging

NOTE: Tournament Steering Committee met immediately following – refer to meeting summary

- **Leverage Captive Audiences**
 - Develop social media/email campaign – integrate with current communications
 - Engage IIAN community – raise awareness, encourage involvement
 - Conduct quarterly fundraisers – raise \$\$\$
 - IIAN Conventions– raise awareness, encourage involvement
 - **Staff Commitment:** Work with marketing firm to build/implement campaign
- **Apply For Grants** – Industry/insurance company foundations
 - Discover resources: Research available industry/education grants
 - **Director/Volunteer Commitment:** Identify insurance industry foundations/opportunities within their circles of influence – both inside/outside IIAN
 - **Staff Commitment:**
 - Develop action calendar – due dates, requirements, resources needed
 - Draft grant template, applications
 - Communication – raise awareness with members, larger audiences; celebrate success
- **Other “Easy” Strategies To Consider:**
 - Check box on IIAN agency member dues renewal forms/invoices
 - **IIAN Director Commitment:** Discuss/approve – June 2017 Board planning retreat
- **Next Steps**
 - Sub-committees - identify/recruit volunteers
 - Develop timeline/action plans