

CENTRALIA HIGH SCHOOL ALUMNI ASSOCIATION: ESTABLISHING A
RESEARCH-BASED COMMUNICATIONS PLAN

by

KRISTIN J. WALLER

B.A., Kansas State University, 2002

A REPORT

submitted in partial fulfillment of the requirements for the degree

MASTER OF SCIENCE

Department of Journalism and Mass Communications
College of Arts & Sciences

KANSAS STATE UNIVERSITY
Manhattan, Kansas

2008

Approved by:

Major Professor
Joye Gordon

Abstract

The goal of this graduate-level report is to establish a research-based communications plan for the Centralia High School Alumni Association (CHSAA) in order to build permanence in relationships between alumni members and the school, as well as, to secure the financial future of the organization. The project will follow a standard public relations RACE (research, action, communication, and evaluation) model. Background research summarizing current trends in the economy, fundraising, donor motivations and solicitation tactics; CHSAA and the environment that surrounds the organization, the school, and businesses in the communities; intervening publics and primary research is analyzed. As a result of the background analysis, four key publics and corresponding strategies and tactics to reach those publics are identified. A campaign budget is proposed; a two-year time period is shown for implementation of created tactics; and finally, evaluation criteria are listed to provide CHSAA with mechanisms for measuring progress toward the end goal of CHSAA being a permanent fixture for Centralia Schools, its alumni members and surrounding communities.

Table of Contents

List of Figures	vii
List of Tables	viii
Dedication	ix
Preface.....	x
Executive Summary	xi
CHAPTER 1 - Research	1
Current Trends	1
U.S. Economy	1
Donor Motivations	2
Social Media / Networking	3
Website Use and Design	5
Donor Solicitation Tactics	6
The Client	7
Centralia High School Alumni Association.....	7
Table 1 - CHS Alumni Member Location	7
Table 2 - 2008 Alumni Banquet Expenses	8
Table 3 - Alumni Communication Mediums.....	8
Environment External to Client	9
Centralia Schools Communities.....	9
Centralia High School.....	9
Table 4 - Centralia Schools Enrollment.....	9
Table 5 - CHS Graduates Post-Secondary Education.....	10
Table 6 - CHS Athletic Results (Past 10 years)	10
501(c)(3) Status.....	10
General Information.....	10
Analysis of Local 501(c)(3) Organizations.....	11
Market Share.....	13
Comparable Alumni Groups in the Area	13

Competing Publics.....	14
Centralia Area Community Association	14
Centralia Junior Booster Club.....	15
CHS Organizations	15
Powell Trust Fund.....	16
Available Resources	16
Alumni Banquet	16
Panther Logo	17
Intervening Publics	17
CHS Alumni 101.....	17
First National Banks: Centralia, Corning, and Seneca.....	18
Local Businesses and Organizations.....	18
Area Media.....	19
Primary Research.....	19
Results: CHS Faculty and Staff Survey	20
Results: CHS Alumni Survey	21
Public Profiles.....	22
CHS Faculty and Staff	22
Young Alumni	22
Alumni Age 35+	22
Alumni Age 65+	23
SWOT Analysis	24
Situation Analysis	25
Core Problem / Opportunity.....	25
CHAPTER 2 - Action Planning.....	26
Communications Plan Goal	26
Communications Plan Objectives.....	26
Key Publics	26
Key Public 1: CHS Faculty and Staff	26
Key Public 2: Young Alumni	27
Key Public 3: Alumni Age 35+	29

Key Public 4: Alumni Age 65+	30
CHAPTER 3 - Communication	33
Description of Tactics	33
Tactic: CHSAA Introduction Letter.....	33
Tactic: Panther Tracks Newsletter	34
Tactic: PAWS	35
Tactic: PAL.....	36
Tactic: Email Invitation	37
Tactic: Panther Tailgate Party.....	39
Tactic: Donation Letter and Response Card	40
Tactic: Panther 3D Form.....	41
Projected Expenses for CHSAA	42
2009 Proposed Timeline of Implementation	44
2010 Proposed Timeline of Implementation	45
CHAPTER 4 - Evaluation.....	46
Evaluation Criteria and Tools	46
Objective One	46
Objective Two.....	46
Objective Three.....	46
Objective Four	46
Objective Five	46
Objective Six.....	47
Objective Seven	47
Objective Eight	47
Objective Nine	47
References.....	48
Appendix A - Charts and Data.....	50
Figure 1 - Census Data CHS Communities	51
Figure 2 - 501(c)(3) Comparison	52
Figure 3 - Alumni Organization Comparison	53
Figure 4 - Alumni Website Comparison (design).....	54

Figure 5 - Alumni Website Comparison (content)	55
Figure 6 - Area Print Media.....	56
Figure 7 - Area Broadcast Media.....	57
Appendix B - National Consumer Supporter Technical Assistance Center	58
Appendix C - Tactic Examples	59
Figure 1 – CHSAA Introduction Letter	60
Figure 2 – Panther Tracks Newsletter.....	61
Figure 3 – PAWS	62
Figure 4 – PAL	63
Figure 5 – ‘Make Your Mark’ Donor Letter / Response Card	64
Appendix D - Power Point Presentation	65

List of Figures

Figure 1 - Census Data CHS Communities	51
Figure 2 - 501(c)(3) Comparison	52
Figure 3 - Alumni Organization Comparison	53
Figure 4 - Alumni Website Comparison (design).....	54
Figure 5 - Alumni Website Comparison (content)	55
Figure 6 - Area Print Media.....	56
Figure 7 - Area Broadcast Media.....	57

List of Tables

Table 1 - CHS Alumni Member Location	7
Table 2 - 2008 Alumni Banquet Expenses	8
Table 3 - Alumni Communication Mediums	8
Table 4 - Centralia Schools Enrollment.....	9
Table 5 - CHS Graduates Post-Secondary Education.....	10
Table 6 - CHS Athletic Results (Past 10 years).....	10

Dedication

A great big thank you to my husband, Brad, my parents Terry and Elaine and everyone else along the way who provided their unwavering patience, support, encouragement, flexibility, advice, and motivation. Words cannot adequately express how grateful I am to have each and every one of you in my life. I would not be where I am today without all of you. Much thanks and love to you all.

Preface

I grew up in Corning, KS, a rural community located in Northeast Kansas. Corning – population 170, which might be generous – is located about an hour northeast of both Topeka and Manhattan. I graduated in 1998 from Centralia High School (CHS), a small 1A school located in Centralia, KS about 10 minutes away from Corning – my graduating class had 28 students. My mother graduated from CHS in 1976; my younger sister graduated from CHS in 2002; and my youngest sister will graduate from CHS this May 2009. I grew up a CHS Panther and since graduation have remained connected and entrenched in the school's history and tradition.

My mother can be credited with the idea for this project. She was waiting to suggest this call to action for a more organized, motivated, financially stable CHS Alumni Association (CHSAA) to my youngest sister as the main concept for my sister's senior exit project. As of about three to four years ago, CHS no longer requires senior exit projects. The timing of the idea was perfect as my graduate work (and I) needed renewed motivation.

The goal of this project is to establish a research-based communications plan for the Centralia High School Alumni Association in order to build permanence in relationships between alumni members and the school, as well as, to secure the financial future of the organization.

After talking to John Whetzal, principal at CHS, his vision for CHSAA included building and maintaining connected relationships with current alumni members, creating a website, and establishing CHSAA as a financial resource to the school, faculty, and alumni members. Those thoughts became the guiding principles for this plan.

A standard public relations RACE (research, action, communication, and evaluation) model was employed for this project. Background research summarizing current trends in the economy, fundraising, donor motivations and solicitation tactics; CHSAA and the environment that surrounds the organization, the school, and businesses in the communities; intervening publics and primary research was analyzed. As a result, four key publics as well as corresponding strategies and tactics to reach those publics are identified. A proposed budget has been created; a two-year time period is shown for implementation of created tactics; and finally, evaluation criteria have been listed to provide CHSAA with mechanisms for measuring progress toward the end goal.

Executive Summary

The goal of this project is to establish a research-based communications plan for the Centralia High School Alumni Association (CHSAA) in order to build permanence in relationships between alumni members and the school, as well as, to secure the financial future of the organization.

Centralia High School is a 1A school located in Centralia, KS. CHSAA is a group that has great potential and support from its alumni as well as the surrounding communities that comprise the school. While other smaller, rural schools in the area face consolidation or decreasing enrollment, Centralia's enrollment numbers continue to grow. The school's total enrollment this 2008-09 academic year is 268 students in grades Kindergarten through grade 12. The school is strong both academically and athletically.

The recent decline in the economy has caused consumer fear of job loss, decreasing home equity, rising fuel costs, seesawing stock market values, and record-high levels of personal debt. These factors will lead potential donors to be tighter with discretionary spending. A sense of financial security has a strong positive relationship to charitable giving, so overcoming donor fears will be important to successful fundraising efforts for CHSAA.

Fundraising is likely to be more effective if the program maintains active contact with alumni through different channels. A website can be an important communication tool for reaching the key publics. Since CHSAA has no online presence and the public is not familiar with the group's newly established image, a website could be a good form of communication for providing updates to members. Additionally, for an organization who is in its early stages of public existence and one that has a minimal budget, any type of cost savings while simultaneously promoting its message will be beneficial.

CHSAA to date has 1,243 members most of whom reside within the state of Kansas. The group does not actively fundraise; a banquet is the group's sole function each year. The donor potential is present as almost \$1500 was raised in the last two years without an organized effort. What the group lacks is a central organized effort for communication, fundraising and growth. If CHSAA does not attain a 501(c)(3) status, which would legitimize the organization as a funding source to Centralia Schools, communication and marketing efforts cannot be implemented. The

goal of becoming a consistent, stable financial resource to Centralia Schools is dependent on the 501(c)(3) status and a consistent, strong communications campaign.

Four key publics have been identified as potential donor groups which will be targeted during the course of this plan. Those publics include CHS faculty and staff, young alumni, alumni members age 35 and over, and alumni members age 65 and over.

The primary message for this plan is a four-word slogan *Tradition, Pride, Teamwork, Future*. These words describe the values that are pre-existing within the school and among alumnus. Secondary messages will include connectedness and participation. It is important for alumni members to participate and feel like they are an active part of CHSAA; and it is important for CHSAA to cultivate relationships with its members. The long lasting relationships will help ensure the success of CHSAA as a permanent structure in the schools' communities.

Strategies that have been identified to drive the attainment of objective completion include the following:

- To educate about the newly, revised image of the Alumni Association;
- To encourage alumni members to stay connected to what is going on with the school, as well as what is going on with the Association;
- To increase attendance and active participation from alumni members – especially those young alumni members; and
- To implement a major fundraising campaign by soliciting donors with a mailer and by providing donors with flexible opportunities to contribute.

A steering committee was established to aid CHSAA in establishing a direction toward becoming a permanent fixture to alumni members and the school. This project will serve as an execution plan for the CHSAA steering committee by outlining a timeline of proposed tactics to be implemented over a two-year time period. The tactics have been designed around four identified key publics and nine specific objectives. A proposed budget and tactic examples are included to provide additional starting points of reference. An evaluation tool is included to aid the committee in determining if the plan is moving CHSAA toward the goal of establishing permanent relationships with current alumni members and financial stability for the organization.

CHAPTER 1 - Research

Current Trends

U.S. Economy

A sense of financial security has a strong positive relationship to charitable giving (Council for Aid to Education, 2008; Lagasse, 2008). In a 2007 survey conducted by the Association of Fundraising Professionals, 63 percent of respondents ranked the economy the top fundraising challenge (Association of Fundraising Professionals, 2007). During the recent financial crisis, Wall Street lost approximately \$2 trillion in shareholder wealth (Dugas, 2008; Paradis, 2008). Consumer fear of job loss, decreasing home equity, rising fuel costs, seesawing stock market values, and record-high levels of personal debt will lead to difficult decisions with regard to discretionary spending (Fabrikant, 2008; Lagasse, 2008). Additionally, to meet federal requirements foundations must disburse five percent of total revenue. During these difficult times, those organizations will pay out only the five percent that is required (Fabrikant, 2008) and not any more. As total assets decrease, the required five percent doesn't go as far for organizations in need of those funds. In turn, foundation priorities shift and some programs that previously received funds may end up with nothing.

Charitable contributions had a record-breaking year in 2006 when \$295.02 billion were donated – almost three-quarters came from individual donations and 55-60 percent came from households with incomes of \$100,000 or less (Lagasse, 2008). In 2007, almost two-thirds of charities raised more money than they did in 2006, with larger organizations faring better than smaller ones (Association of Funding Professionals, 2007). The size of those gains dropped dramatically however (Association of Funding Professionals, 2007).

Organizations must take a long-term view at fundraising programs to understand what averaged effects of economic fluctuations will be on charitable giving (Kibble, 2008; Lagasse, 2008). One myth associated with economy downturns is that it is harder to raise money during a recession; the truth is that it is harder to raise money quickly (Lagasse, 2008). People will continue to give through good times and bad, but the rate of increase tends to slow (Lagasse, 2008). One other trend that may increase during this time is an increase in ‘sweat equity’.

Individuals may increase their donation of time, rather than money. Fifty percent of people believe that giving time to a charity is more important than giving money (Lagasse, 2008).

To continue to encourage giving, nonprofits must reinforce donors with a positive message and develop strategies to compensate for potential shortfalls (Kibble, 2008; Lagasse, 2008). Organizations can look at recruitment strategies, data segmentation, offer donor flexibility, enhance emergency appeals via email, and reinforce tax exempt opportunities (Kibble, 2008). Other factors that will continue to encourage donor activity is whether an organization makes a compelling case, whether the donor has a personal connection to the cause and whether the donor believes the organization demonstrates the ability to make good on what it promises (Lagasse, 2008). Organizations must continue to take advantage of opportunities in order to meet donors' fears and expectations during this economic crisis (Kibble, 2008).

Donor Motivations

The approach to fundraising for higher education has shifted from charity to philanthropy in the last 100 years. This is due to an increased understanding in donor behavior and donor motivations (Hunter et al., 1999). Identifying characteristics of alumni donors was deemed important as a means of providing insight and knowledge for use in developing strategies to increase alumni as one of the sources of philanthropic support (Hunter, Jones & Boger, 1999).

However, studies regarding donor behavior have yielded inconsistent results. In review of nine studies on alumni attitudes and giving that spanned 20 years, four of those studies conclude that there is little or no direct relationships between alumni attitudes and giving. The other five studies suggest that a positive image may be a necessary component of giving (Kelly, 1991).

Most examples of donor behavior and donor motivations come at the post-secondary level. In rural Kansas, there are not many examples of organized alumni groups or organized fundraising efforts for those groups. It will be essential to take what has been learned at the post-secondary level and apply those principles to smaller organizations that have fewer available resources.

A 1986 study by White (as cited in Kelly, 1991) showed that an array of factors combine to motivate an individual to make contributions. In order to segment potential publics, researchers can look at demographic, psychographic and behavioral characteristics.

Demographic indicators of donor behavior include age, sex, household income, level of education, and number of years since graduation (Hunter et al., 1999; Kelly, 1991; Tsao & Coll, 2005; Van Slyke & Brooks, 2005). While demographic variables are much easier to measure, psychographic information also provides solid indication of donor behavior. Determining who is psychologically or emotionally connected to the institution is essential to the successful marketing of the fundraising efforts (Hunter et al., 1999).

It is suggested that emotional attachment to the alumni institution is the strongest predictor of alumni contribution status (Gail & Elmer, 1994; Hunter et al., 1999; Tsao & Coll, 2005). Other psychographic indicators include satisfaction with institution, how well one identifies with the school, communication with the school and perceived quality of the institution (Gail & Elmer, 1994; Hunter et al., 1999; Tsao & Coll, 2005). The higher the levels of these factors; the more likely the intent to donate will be.

As demographic and psychographic factors are identified, an organization hopes those factors will result in behavior or action to donate. Behavioral indicators include alumni involvement with their school after graduation and regular contact with the program (Tsao & Coll, 2005). Additionally, altruistic behaviors and donations tend to increase when donors are given choices regarding how and where their money will be utilized, as well as opportunities to be actively involved, and recognition for that participation or involvement (Tsao & Coll, 2005; Van Slyke & Brooks, 2005).

Finally, the more satisfied and confident alumni are in the program, the greater their expressed intent to make donations (Tsao & Coll, 2005). There is a more significant relationship between financial giving and attitudes of alumni when those schools have clear policies, realistic goals, an effective information network, and a qualified management team (Hunter et al., 1999).

Social Media / Networking

Society has been transformed from the information age to the connected age. People around the world are using new digital media to connect with one another, influence their communities, and catalyze social-change efforts (Fine, 2006).

These social media are inexpensive, easy to use, and allow individuals and small groups to bring about big changes. This technology facilitates and strengthens the connectedness (Fine, 2006). This social media also allows large numbers of people to connect to a cause or

organization. More importantly, these social media have caused a shift in power from the institution to the individual. Young people are more likely to go online to express views and instantly connect with individuals and communities interested in their issues and concerns. They also self-organize for social action (Fine, 2006).

In a connected world, the power comes from an organization's supporters; the more numerous and more diffuse they are the more power they generate. These supporters, when invited to participate in all facets of an organization's work in meaningful ways, can become a loyal network of donors (Fine, 2006). Meaningful personal interactions are why many Americans continue to provide volunteer hours. Nonprofit organizations need to examine the way that they are interacting with their volunteers, board members, clients and donors to offer these kinds of experiences (Fine, 2006).

More progress is made more rapidly when organizations move to facilitating rather than controlling social-change efforts. If nonprofit groups with the help of social media change their approach, they can create a vast power surge for social change (Fine, 2006).

Examples of these types of social media can be found in social networking sites. Sites such as Facebook and MySpace, which are popular among individuals in and around the age of 30 years and younger, are examples of two current popular sites. Other sites that offer similar services that are tailored toward alumni include Classmates Online and AlumniClass.com.

Facebook is generally considered the leading social networking site among college students (EDUCAUSE Learning Initiative, 2006). The site is designed to connect users based on personal interests, affiliations, pictures and with almost anything an individual user wants to post to their personal profile. The ability to send messages to targeted groups of users is the most important feature of Facebook for some (EDUCAUSE Learning Initiative, 2006). Creators of groups can share messages and resources to all self-identified users or members of the groups. It offers an opportunity for organizations to reach groups of individuals with their particular message.

Classmates.com helps members find, connect and keep in touch with friends and acquaintances with whom they have lost contact (Classmates, n.d.). Membership levels differ in what the user has access to in terms of searching for friends, emailing, using tools to plan reunions, and communicating with friends. A downside may be that it is standard practice for Classmates.com to auto-renew memberships at the end of each billing period. Privacy is

protected through a double-blind email system, so email addresses and contact information are never revealed unless self-disclosed by members.

Website Use and Design

Fundraising is likely to be more effective if the program maintains active contact with alumni through different channels (Tsao & Coll, 2005). There is a need for organizations to have an Internet presence to project a favorable image and create a stronger brand identity with their members (Tuckman, Chatterjee, & Muha, 2004). Websites can be an important communication tool for reaching the general public and the constituencies served, providing information that enables dissemination of missions, member registration, soliciting donations, and creating of greater public understanding of activities (Tuckman et al., 2004). Since CHSAA has no online presence and the public is not familiar with the group's newly revitalized mission, a website could be a good form of communication for providing updates to those who do not have a direct involvement with the school and/or those who live outside the community.

The global reach of Internet provides a powerful and cost-effective way of soliciting interest in programs (Tuckman et al., 2004). Online communication can lead to reduced mailing and printing costs. Items such as newsletters or donor solicitation letters that are normally mailed as hard copies can be made available online. For an organization in its early stages of public existence and one that has a minimal budget, any type of cost savings while simultaneously promoting its message will be beneficial to the group.

Website content strategy should provide the foundation to attract visitors, keep them interested in your mission or cause, and encourage them to keep coming back for more (Baker, 2001). A website strategy should help inform, educate, motivate, persuade and encourage people to take some form of action (Baker, 2001). The home page must appeal to everyone who visits the site, no matter how diverse the interests (Krug, 2000; Pratt, 2007).

Keys to building a good website start with building the site for the group's users, keeping users actively involved, and making the site relevant to their lives (Baker, 2001; Pratt, 2007). The website should be self-evident, obvious, and self-explanatory (Krug, 2000). The site and its pages should be organized into clearly defined areas; it should minimize clutter, noise and use of text (Krug, 2000; Pratt, 2007; Kavanagh & Hoff, 2006). These guidelines will serve as the basis of the design concepts used for the website template of CHSAA.

Donor Solicitation Tactics

The fund-raising letter is the most effective and efficient method of contacting potential donors (McDermott-Griggs & Card, 1992). Next to the letter, the response card may well be the most important item in a group's direct mail package (Barnes, 2001). As such, CHSAA may want to look at these tactics as options for donor solicitation. Or, CHSAA may want to transform these tactics into online options.

Donors recruited through direct mail never made a second gift 50 to 70 percent of the time (Hall, 2004). Charities should concentrate on forming long-term relationships with new donors and let them choose how they wish to receive information (Hall, 2004). An initial fund-raising letter may be effective, but the letter should provide the donor with a number of ways to support the cause (Barnes, 2001). Careful consideration must occur when designing direct mail pieces to reach older publics. These publics may not have access to or prefer online options. Designing pieces that are clear, concise, and effective to older publics will be important as they offer a unique opportunity as potential donors.

For younger alumni groups, research indicates that snail mail efforts combined with emailed solicitation efforts increased the number of gifts (Wallace, 2004). Emailed appeals as either a second solicitation or those sent out on the same schedule as other solicitations prove to be popular among institutions who have integrated email appeals into their solicitations (Wallace, 2004). This research indicates that the creation of email solicitation or a listserv could be beneficial in terms of soliciting funds, as well as building donor relationships by keeping groups informed.

Two crucial elements that make solicitation materials effective are the copy and the design (Barnes, 2001). Materials must state a clear purpose and explanation as to why it is important for a potential donor to give to a cause (Barnes, 2001; McDermott-Griggs & Card, 1992). The materials should be visually attractive with a powerful headline or title (Barnes, 2001; McDermott-Griggs & Card, 1992). These thoughts will be the foundation for designing templates for the following items 1) newsletter, 2) donor letter and response card, and 3) email blast for listserv group.

The Client

Centralia High School Alumni Association

Per the current CHSAA database, to date, there are 1,243 alumni members from graduating classes 1923 to 2008 – the majority of which live within the state of Kansas (See Table 1). The database is maintained by one of the school's retired administrative assistants. Alumni address information is tracked and updated in Microsoft Access.

Table 1 - CHS Alumni Member Location

Alumni living within State	1299 (70%)
Alumni living within Marshall & Nemaha Counties	680 (39%)
Alumni living within School Communities	506 (29%)
Alumni living outside the State	293 (16%)
Alumni with unknown location	181 (10%)

Currently, an Alumni Banquet is the one activity that brings alumni members together each year. This banquet is organized by the 10-year class and honors six graduated classes (10, 25, 40, 50, 60 and 75-year classes). The banquet includes a social hour for networking, a dinner, presentation of honored classes and a business meeting. Class reunion efforts markedly increased the percentage of alumni donor participation (Gail & Elmer, 1994).

There is no actual budget. Expenses associated with the banquet are covered by what little money is in the current Alumni Fund in addition to amounts collected from alumni and guests for dinner reservations. Expenses include postage for mailing invitations, printing of banquet programs, reimbursement for purchase of any decorations and/or entertainment as determined by the host class, and the caterer (See Table 2).

There is no promotion of the group and also no central location (i.e. website) for alumni members to get information about the school, upcoming events or exchange communication with fellow classmates or alumni members. There is no organized line of communication (i.e. listserv, email, newsletter, etc.) between the school and the alumni members. There is no organized line of communication between members of each class unless each specific class has taken it upon itself to organize the contact information and means of communication (See Table 3).

Table 2 - 2008 Alumni Banquet Expenses

May 2008 Beginning Balance Association account	\$ 759.78
Expenses	
Postage / mailing of invitations	\$ 415.08
Printing – banquet programs	Donated
Reimbursement – decorations	\$ 88.54
Newspaper Advertising	\$ 34.00
Caterer	\$ 1,880.05
Payment of Servers	\$ 100.00
Total Expenses	\$ 2,517.67
Total Money Collected Dinner Reservations	\$ 2,784.00
Net Gain/Loss	\$ 266.33
Ending balance in Association account	\$ 1,026.11

Table 3 - Alumni Communication Mediums

Medium	Presence
Email address	Yes – not used consistently
Facebook Group	Yes – some activity
Listserv	No
Newsletter	No
Website	No – school does have site.

There is no organizational structure – no board of directors, president, vice president, etc. A steering committee has been formed as a starting point for the organization of CHSAA. The committee consists of nine key community members and is overseen by the principal. The board met twice over the summer and the following were identified as starting points to a more established association: 1) establish the association properly as a 501(c)(3) nonprofit organization; 2) create and maintain a website; 3) establish criteria and an application process for post-secondary scholarships. The group continues to be challenged with more questions than answers, and a precise direction is needed.

Environment External to Client

Centralia Schools Communities

CHS is located in rural northeast Kansas in Centralia, KS. CHS draws its enrollment numbers from three local communities – Centralia, Corning, and Vermillion. The communities are located about an hour north from both Topeka and Manhattan and two hours from Kansas City. Even though the median age of two of three communities might not reflect a younger generation, a promising characteristic about these communities is that a younger population is moving back, building homes and starting families. The majority of individuals in this group attended and graduated from CHS. Many individuals commute to their respective jobs (See Appendix A – Figure 1). The communities are tightly-knit and supportive of the school, as well as, the individual causes that may arise.

Centralia High School

The first graduating class of the CHS is listed as 1886. Corning High School operated until 1968 and eventually closed when Corning and Vermillion consolidated with Centralia High School to create the graduating class of 1969. Corning Grade School continued to operate until 1981 when it then consolidated with Centralia elementary school. The elementary, junior and senior high schools are currently housed in one building. While other schools continue to face consolidation due to decreasing enrollment numbers, enrollment at Centralia schools has continued to flourish (See Table 4).

Table 4 - Centralia Schools Enrollment

Year	2006-07	2007-08	2008-09	2009-10 Projected
Elementary (K-6th grade)	133	147	143	155
Junior High (7th-8th grades)	49	36	36	37
Senior High (9th-12th grades)	79	82	89	88
Total Enrollment	261	265	268	280

High standards have continued to be met both academically and athletically. Academically, CHS received national recognition from *U.S. News and World Report* when the school was named a ‘Bronze Medal School’ by the magazine. Approximately 29,000 schools

were divided into Gold, Silver and Bronze Medal winners. The award is based on how the total dollars available to the school were utilized to prepare students for post-secondary education. The past two years, the school has also experienced a 100 percent graduation rate. Additionally, the majority of students are motivated to pursue a post-secondary education (See Table 5). Athletically, the school has achieved numerous league championships in recent years and has made a number of state appearances with top three finishes (See Table 6).

Table 5 - CHS Graduates Post-Secondary Education

Year	Senior Class Size	Graduated	Attended post-secondary education
2007	21	21	18
2008	14	14	13

Table 6 - CHS Athletic Results (Past 10 years)

KSHSAA Classification	1A
League	Twin Valley League
State Championships (2008-1998)	12
Runners-Up (2008-1998)	4
Third Place (2008-1998)	1
Total Top 3 Finishes at State	16

This is information that should be promoted to alumni members and potential donors. Potential donors are likely to welcome that type of solid investment with CHSAA whose purpose will be to ensure the school's continuation of excellence.

501(c)(3) Status

General Information

Organizations that meet the requirements of the Internal Revenue Code section 501(c)(3) are exempt from federal income tax as charitable organizations. In addition, contributions made to those types of organizations by individuals and corporations are tax deductible. Every exempt charitable organization is classified as either a public charity or a private foundation. Within those two categories, CHSAA would fall under the 'educational' category of a private

foundation. To apply for tax-exempt status an organization must obtain application form 1023 and detailed instructions contained in Publication 557.

The National Consumer Supporter Technical Assistance Center provides documentation that outlines the steps for applying for 501(c)(3) status and also provides examples of the documents necessary to the application process (See Appendix B). Items that are included as a ‘must’ for the application process are: formulating a mission statement, board of directors, developing a budget, record keeping system, develop an accounting system, filing for 501(c)(3) status, a Federal Employee Identification Number, filing for state and local tax exemption, and fulfill charitable solicitation law requirements. Organizations also should file articles of incorporation, draft bylaws, develop a strategic plan, and develop a business plan. Finally, an organization can apply for a nonprofit mailing permit, which is something that would allow additional cost savings.

Analysis of Local 501(c)(3) Organizations

In order to better market the efforts of CHSAA, a comparison of local 501(c)(3) organizations has been performed. Based on the information found, a recommendation will be made to CHSAA to either 1) couple their efforts with those of a pre-existing nonprofit organization or 2) apply for their own individual nonprofit status. Two organizations that would provide a pre-existing nonprofit status are the USD 380 Endowment Association, which is operated out of the USD 380 School District office in Vermillion, KS and the S.T.E.P Foundation, which is operated out of Seneca, KS.

The Endowment Association and STEP Foundation offer many similar options for an organization to operate a fund under the tax exempt umbrella each provides. Both groups are responsible for administrative duties associated with the fund (i.e. acceptance and disbursement of funds, filing of tax return, proof of donation to donor, etc.). Both groups require that donors make gifts directly to the Endowment Association or the STEP Foundation. From there the amounts are earmarked and allocated to the appropriate organization’s fund.

Differences between the groups are noticed in the types of fees associated with the services provided. STEP Foundation charges a set up fee, as well as a fee for administrative duties. The donor appears to have a little more flexibility with the STEP Foundation in that he/she has some control in where/how funds are invested. Once gifts are made to the

Endowment Association, they are accepted as property of that Association. Additionally, there is a minimum amount of \$10,000 required to establish a fund with the STEP Foundation. There is no minimum amount for the Endowment Association (See Appendix A – Figure 2).

The second option is for the Association to apply for its own 501(c)(3) status. Two organizations – the Frankfort Alumni Association and the Valley Heights Community Foundation – that serve communities similar in size to the ones surrounding the Centralia Schools will be analyzed.

Frankfort Schools make up the other half of USD 380 – the same district as Centralia Schools. The Frankfort Alumni Association is a tax-exempt organization located in Frankfort, KS. Necessary forms and required paperwork were filed with the help of an attorney who was a Frankfort High School graduate; time and services were donated by that individual. The 15-year class is responsible for meeting annually and organizing the banquet. The group is overseen by an FHS faculty member, but there is no organized board or officers. This group does not seek the advice or services of an accountant. Current faculty member, Tom Schroeder, is responsible for tracking amounts that are received and disbursed. The amounts are deposited into the community bank and kept in a CD.

The Frankfort Alumni Association has two main fundraising efforts to help reach an annual goal of raising \$2000-\$3000 each year. Funds come from sales of “Wildcat Gear” – FHS clothing and memorabilia which is sold to the community. A small amount is raised from the annual banquet dinner reservations, as well as, any funds donated on an individual basis. The group has not received any substantial gifts and there are no long-term memorials. Individuals who make larger gifts generally donate their amounts to the USD 380 Endowment Association and those funds are earmarked for FHS. Individuals who donate smaller amounts make checks payable directly to the Frankfort Alumni Association and are recognized at the annual banquet. The group tries to have enough funds to be able to donate at least \$100 to each graduating senior.

The Valley Heights Community Foundation (VHCF) is a 501(c)(3) organization that was created to support the school district of Blue Rapids and Valley Heights school systems. This group operates according to their own operating procedures and bylaws. The group sought the help of a CPA and attorney on a volunteer basis to file the forms required to establish the nonprofit status. The application process took approximately two months.

VHCF has a nine-member board that is comprised of two community members, two school board members, two teachers, two at-large members and the superintendent who acts as an ex-officio member. The board appoints a president, vice-president, treasurer and a three-member investment committee. The board members serve staggered three year terms. The board members who have completed their terms select the new board members.

VHCF was put in place to receive gifts. Their purpose was not to go out and solicit funds; so there are no organized fundraising efforts. This group raised funds initially by talking to local groups such as the Rotary Club, Lions Club, and by placing ads in the local papers.

If an individual wants to give a large gift, the first step is to determine the intent and purpose of the gift. The donor can set parameters to a particular area (i.e. scholarship to be awarded to recipient interested in nursing) but is not permitted to be involved in the investment options. A letter agreement between the two parties is created and both parties sign the document. Smaller gifts receive a thank you letter and are contributed toward the VHCF overall operating budget. A double-entry book keeping system is beneficial.

Terry Blaser, co-founder of VHCF, communicated that the group has experienced no major negatives in having their own nonprofit status. He stated that one of the biggest challenges in establishing a foundation was continued growth. Blaser emphasized that keys to the success of any nonprofit group must include at least one individual who can be dedicated to the operation of the organization and many volunteers who are willing to work hard toward the group's purpose.

Market Share

Comparable Alumni Groups in the Area

CHS is a member school of the Twin Valley League. The Twin Valley League is a Kansas state athletic conference comprised of 13 area schools in Northeast Kansas classified as either 1A or 2A according to the Kansas State High School Activities Association. The alumni associations of schools in the Twin Valley League were analyzed in order to determine their level of organization. A number of schools in the Twin Valley League do have alumni groups in place, though the organization of those groups is similar to that of CHS. The alumni responsibilities are passed from class to class, many schools host an annual banquet, there are no

organized fundraising efforts, no website, and there is no organized board or central core of leaders to increase the potential growth of those groups.

Additionally the alumni associations and/or community foundations of three area schools with larger enrollment numbers were analyzed based on their level of organization. The alumni associations and/or foundations of each school have one or more of the organizational aspects for which CHSAA is striving. These schools have an organized board, updated websites; they award scholarships and have active fundraising efforts to maintain the operations and financial stability of each group. Each one of these groups has something to offer in better establishing the CHSAA (See Appendix A – Figure 3).

The websites of these groups are also very basic, which is most likely a reflection of their users. Users more likely are going to be less-technologically savvy, so the layout and content is very basic. It will not be so complicated, overwhelming and busy that users get confused and frustrated with the user-friendliness of the site. Eight of the 12 area alumni groups that were compared from an organizational standpoint had alumni or related foundation website. Those websites were evaluated based on Steve Krug's web usability evaluation criteria. The criteria include a) five areas of effective user visibility of website and b) five elements of persistent navigation (See Appendix A – Figure 4). Additionally, the content of those websites was evaluated from a objective standpoint in terms of what items, subjects, features, etc were included on the page (See Appendix A – Figure 5).

Competing Publics

Centralia Area Community Association

The Centralia Area Community Association (CACA) was established around the year 2000. The American Legion building had come up for sale. Interest in the community was ripe for some type of community center and this was a good opportunity according to Larry Glatczak, CHS faculty member and Centralia community member. A committee was formed and the purchase of the building was completed.

A low interest loan was taken out from the Centralia First National Bank. The City of Centralia would be responsible for paying the utilities until the loan balance was paid. CACA receives income from rentals and facility fees to offset the loan payments. This income is derived from user fees for dances and community events such as weddings and auctions.

Donations were taken during the first years of establishment. The CACA is a nonprofit organization so individuals can utilize a tax deduction if individual contributions are made.

Centralia Junior Booster Club

The Centralia Junior Booster Club was formed in the early 1990's to promote community growth and provide some additional activities and opportunities for the kids in the community. The club is a nonprofit organization and individuals can utilize a tax deduction if individual contributions are made.

The club's primary source of revenue is from donations and fund raising. Annual fund raising efforts include a February basketball tournament for 5th and 6th graders. The event brings in around \$3,000 that helps support other community growth efforts throughout the year. Some of those efforts include scholarship opportunities for graduating seniors, annual Easter Egg Hunt and July 4th celebrations, and bringing Santa Claus to town. The club also tries to build or donate a project (i.e. batting cage, shelter house) for the town of Centralia.

CHS Organizations

There are a number of the school's organizations that conduct fundraising activities each year. The main goal of those fundraising efforts is to create revenue to cover the class/organization projects for the year. A few of the classes/organizations that have dedicated fundraising efforts and the purpose for each are listed as follows:

1. Publications – Advertising sales to local businesses to pay for costs associated with publication of the school's annual yearbook
2. Junior Class – Sells magazines and operates all concession stand sales to pay for costs associated with prom
3. Sophomore Class – Raises funds from dinner ticket sales by hosting annual spaghetti supper to help build up their account for prom expenses when they host as juniors.
4. Music Classes – Sell frozen food items to raise funds for music trips/excursions
5. Future Farmers of America (FFA) – Sells fruit to raise funds for annual expenses and club budget
6. Family, Career and Community Leaders of America (FCCLA) – House of Panther (HOP) Shoppe sells various Panther memorabilia, special occasion balloons and candy; funds used for annual expenses and club budget

Powell Trust Fund

There are two schools that comprise USD 380, Centralia and Frankfort. Frankfort schools were the recipients of a substantial gift in the form of a trust. The Trust is an agreement established between the Charles E. Powell Trust and the Unified School District #380, as well as, the Unified School District #380's Endowment Association. The agreement outlines that Kansas Statutes do not prohibit the school district from entering into the agreement. K.S.A. 72-8210 provides for the establishment of a 'gift fund' where the school district can establish a separate fund to receive the gift. This fund is kept separate and does not impact budget or state financing.

The agreement stipulates that USD #380 should continue with its normal budgeting process and should not take into account the additional income from the trust. This additional income will be used for the benefit of the Frankfort schools in addition to budgeted funds. If the budget is cut it must be done for all students of USD #380; not just a reduction for Frankfort schools.

Additionally the Board of Education cannot budget more money for other schools within its district. It may not account for income that the Frankfort schools will receive from the Trust. This fund shall be construed as a supplement to regular budget items. Funds from this trust cannot be used to purchase something that district funds would purchase. If Frankfort schools purchase an item using the fund; CHS cannot use district funds to purchase the same item.

For example, if Frankfort wants to purchase TV monitors for distance learning classes and the Powell Trust is utilized to pay for the expense. If Centralia is in need of the same monitors, there is no additional fund for the school to utilize, and they are not permitted to use district funds per the terms of the Trust. This impacts Centralia schools directly and puts them at a financial disadvantage.

Available Resources

Alumni Banquet

At the 2007 Alumni Banquet, donation cards were placed at each place setting. The purpose of the cards was three-fold:

1. To solicit donations for scholarship and general alumni fund; \$670 was collected.
2. To provide mechanism for address updates;

3. To determine interest levels regarding alumni association in order to successfully administer a survey.

At the 2008 Alumni Banquet, donation cards were again placed at each place setting. The sole purpose of the cards was to solicit donations for the scholarship and general alumni fund. Again, without much marketing effort another \$600+ were raised.

The fact that almost \$1300 was raised in two years with minimal organized marketing effort makes the alumni banquet a potential source of annual revenue. It also speaks to the pride of CHS alumni members and to the potential of the organization as a whole. If the alumni organization was organized properly under a 501(c)(3) umbrella and a solid marketing plan was created and implemented, the untapped potential of the group grows exponentially.

Panther Logo

The mascot for CHS is the panther. The school has a logo that is used consistently in identifying individuals and organizations involved with the school. The logo consists of a modern-looking panther head. It is comprised of clean lines that outline the shape of the head in the school colors, black and orange. The logo is accepted and recognized across other league schools. It is recognized and used if the school is involved in any activities that take place at a state level. There are some school organizations that may use other clip art logos of panther paws or another version of the panther. The school's own website does not utilize the current panther head logo as the dominant image on the school's homepage. The Association's logo should include the modern panther head so that a consistent brand image is established.

Intervening Publics

CHS Alumni 101

In talking with the principal at CHS, he is in favor of adding a class to the school's curriculum that would be responsible for maintaining the communication efforts of the alumni association. The class could be responsible for maintaining the alumni database, the alumni website, potentially designing and editing a newsletter, sending out email blasts and other day-to-day tasks that would allow the association to be self-sustaining. The benefits would be two-fold. The alumni association gets the benefit of student workers at a little to no cost; the students get practical experience and class credit.

First National Banks: Centralia, Corning, and Seneca

Established in 1882 the three branches of the First National Bank are dedicated to helping their customers with all their banking needs. These banks are the major financial institutions in and around the school's community. The banks are owned and managed by Bruce and Matt Bachman, brothers who reside in Centralia. Both brothers, their father and their children are graduates of CHS and have been avid supporters financially for community and school events.

This organization could be a great resource in terms of distributing alumni association information to many in-state and out-of-state young alumni. Many of the residents from the school's community and surrounding communities do their banking with FNB. FNB has an online site that could be an opportunity for cross-promotional information/awareness. An opportunity to couple alumni mailings with bank mailings is present. Additionally, another opportunity is present in working with the bank to get individuals to establish donations directly to the alumni association account via a direct deposit mechanism or automatic paycheck deduction.

The First National Bank could provide the following three opportunities to aid in the promotion of the Association:

1. Bank website provides a location to link to the Association.
2. Cost-effective communication medium if mailing efforts are coupled with that of the Association.
3. Opportunity for individuals to donate via a direct deposit feature.

Local Businesses and Organizations

With a tight-knit community it is easy for residents to get on-board and/or involved in something in which they believe. The school draws great support from the surrounding communities. Working to combine marketing efforts of the alumni association with those of the local businesses/organizations is an opportunity to increase awareness about the association. Conversely, local businesses are often called upon to participate in the fundraising efforts of many organizations. Caution should be used when working with these businesses as the association would not want to be perceived as a drain on their finances.

An example of this could be with the Centralia Junior Boosters. This group prints a limited number of CHS Panther sweatshirts, t-shirts, etc. and sells those items each year. This

group does not have a website. The purchase of these items may be of interest to alumni members. An agreement could be reached between the Jr. Boosters and CHSAA where the Jr. Boosters could use the Association's website to market and sell their items; and CHSAA could yield a small percentage of the sales in return.

Area Media

In order for CHSAA to be successful, people have to know about it and be aware of its mission. There are several communication mediums that could be utilized to promote the message of CHSAA. Nemaha County hosts two newspapers – *The Courier-Tribune* and *Sabetha Herald* – and neighboring Marshall County hosts an additional newspaper – *The Marysville Advocate* (See Appendix A – Figure 6). Both Nemaha and Marshall Counties host radio stations (See Appendix A – Figure 7).

The media that are consumed most often and are closest in proximity to the school are The Courier-Tribune and radio station KMZA 92.1. These media would be effective in promoting the Association's accomplishments and advertising specific events to the public. Additionally, the Topeka-Capital Journal may also be a good resource in terms of advertising some of the bigger events hosted by CHSAA, though it may not be as cost-effective.

Primary Research

Survey instruments in previous research have included questions pertaining to the giving and volunteering patterns, behaviors, attitudes, solicitation preferences of respondents, as well as, the sources of information used to make charitable giving decisions, probability of contributing to the school, and willingness to donate (Van Slyke, 2005; Gail, 1994). Additionally, survey instruments have presented respondents with 10 reasons to donate to an institution, which include gratitude for education, gratitude for experience, acknowledgement of career preparation, tax deduction, show appreciation to teachers, identification with school, to help build better educational program, to help with specific program/undertaking, children attend alma mater, to be like friends/relatives who donate (Gail, 1994). Finally, a five-point Likert scale has been used to rate those responses (Gail, 1994).

With these thoughts in mind, two surveys were devised and administered to the following groups 1) faculty and staff and 2) alumni members. The interest levels and opinions of these two groups will be essential to the success of the CHSAA.

Faculty and staff responded to a 10-question survey regarding projects that could benefit from additional funds, how teaching methods were hindered or aided with current resources and opinions on development/enhancement of alumni association and how it should be used to aid the school.

Alumni members completed a 37-question survey via an online survey service, “SurveyMonkey.com”. Questions consisted of determining interest levels in the formation of an alumni association, donating to an alumni association, staying linked to classmates and the school, alumni banquet, computer access, alumni website, and demographic information. Respondents for this group totaled 86 out of 202.

Alumni respondents were contacted based on email addresses gathered in two ways:

1. Respondents were asked if they would participate in a survey related to CHS Alumni.

Based on their response to that question, which was listed on the donation card that was circulated at the 2007 Alumni Banquet, a survey was emailed to them

Respondents were taken from a convenience sample of previously established email address books of four to five local alumni members

Results: CHS Faculty and Staff Survey

Out of 14 respondents, the following were suggested most often by faculty/staff as areas where they thought the school in general could benefit from additional funding:

- Technology upgrades
- Student rewards (i.e. recognition for Kansas state assessment test achievement)
- Teacher aides
- Classroom resources and materials

The following were suggested most often by faculty/staff as areas where they thought current students could benefit from additional funding:

- Technology
- Athletic facility improvements
- Student rewards and recognition for achievement
- Classroom resources and materials
- Opportunities for low income students

All 14 respondents at one point or another had contributed their own money to purchase materials, supplies for classroom projects.

- Personal funds contributed ranged from \$40 to \$1,500

The following opinions regarding the development of an alumni association were provided by faculty/staff:

- 10 out of 14 provided a positive response of encouragement or thanks toward the establishment of an alumni association
- 4 respondents did not provide opinions

Results: CHS Alumni Survey

- 66 out of 86 respondents (38.4%) answered that it was either ‘very important’ or ‘somewhat important’ to stay connected to CHS
- The following were listed as the top three priorities for an alumni association among 86 respondents:
 - to provide opportunities for current and graduating students (61.2%);
 - to provide opportunities for teachers (49.4%); and
 - to help alumni stay in touch with CHS and current events at the school
- The following were listed as the top two motivations to donate to the association:
 - to support the learning environment of current Panther students (average response 2.71)
 - to donate to scholarships for both current and graduating students (average response 2.80)
- 74 out of 83 respondents (89.2%) would be more willing to donate if they could designate the area where their donation is applied
- 66 out of 83 respondents (79.5%) would prefer to donate once a year
- 79 out of 86 respondents (92 %) keep in touch with fellow CHS classmates
 - 41 percent keep in touch via email
- 60 out of 83 respondents (72.3%) are interested in receiving current updates from CHS
- 60 out of 78 respondents (76.9%) prefer to receive those updates via email
- 6.4 % preferred to receive updates via a social networking site such as Facebook
 - 6.4 % could be directly attributed to the age of the respondents

Public Profiles

CHS Faculty and Staff

In a profession that is overworked and underpaid, faculty and staff members are obviously an integral part of the day-to-day operations at school. They are in tune to the needs in their own classrooms, as well as, the needs of the school as a whole. They are also sensitive to the needs of their students. This group has contributed money from their own pocket at one time or another for various classroom materials, projects and rewards. This group has expressed positive feedback at the prospect of the formation of an organized alumni association, one from which they might also benefit. This group views the association as a potential source of supplemental revenue which might be used for educational materials and supplies. Difficulties might include trying to find volunteer time in an already packed schedule that includes being class and/or club sponsors.

Young Alumni

In looking at the first 20 websites when searching ‘young alumni’ via Google, it was found that 14 of those 20 consider the group to have graduated within the last 10 to 15 years. With that in mind, this project will consider the CHS young alumni to fall within the same time frame – those individuals who have graduated within the last 15 years. It is important to change the image of the alumni association in the eyes of this group. This group cannot view the association as an ‘old person’s organization’. Technology will be important in communicating with this group (i.e. email, online access, Facebook). Specific events might be appropriate for this group (i.e. golf tournament, softball tournament, tailgate party at HS football game). It will be important to get the attention and interest of this group early to encourage them to stay actively connected to CHS.

Alumni Age 35+

This group is more established in different aspects of their lives and likely has more disposable income available. This group may also have children who are beginning their journey through the school system. This group is at the point where they may be thinking about saving for retirement, their child’s education, and making other solid investments. By providing a solid foundation to which this group can donate would benefit this group two-fold. The group would

receive the tax benefits of donating to a nonprofit educational group. In return that group would be responsible for ensuring the continued educational support of their children.

New technology and social networking sites might be appropriate for reaching the young alumni, but a solution must be created to reach this mid-range alumni group. This group most likely has no knowledge or desire to be on social networking sites. The sites may be viewed as unfamiliar and concerns with sharing personal information and pictures may be uncomfortable for some. An alumni website that offers a secure registration, login to access and trade personal information, and the ability to donate online are examples of features that could help make the site a great resource. The site should offer some of the main features of social networking sites, but in a less complicated, less obvious manner. Additionally, quick-hitting emails via a listserv or online newsletters could help this group stay engaged.

Alumni Age 65+

There are three key points to consider when choosing this group as a target public. First, there is a good chance that this group has grandchildren who might be coming up through the ranks of the Centralia school system. Contributing to a stable learning environment and providing opportunity for a good education can be major selling points. Secondly, communicating with this group would have to go through the more traditional means of mailings, hard-copy newsletters, brochures. The vast majority of Americans age 65 and older do not go online (PEW Internet & American Life Project, 2006).

Finally, as this group approaches the age of 70, if they have IRA's in place, they are forced to take required minimum distributions starting the year after they turn 70 ½ (L. Waller, personal communication, September 25, 2008). The IRS forces the distributions so they can receive some tax money on an amount that has not ever been taxed previously. However, if that money is gifted to a charity, then the IRS allows for a 50% reduction in adjusted gross income for that amount (personal communication, September 25, 2008). Additionally, if the IRA amount is gifted at death to a qualified charity then neither the donor nor the charity pays taxes on that money – even though it has never been taxed previously (personal communication, September 25, 2008).

Another benefit, if the donor is in a much higher tax bracket, is that the gift is not includable in the donor's taxable estate (personal communication, September 25, 2008). The

IRS acknowledges that charitable giving is beneficial to the country and as such, the giving is encouraged with these types of tax breaks. To have an option in place for this group of donors could lead to a consistent source of revenue for the Association.

SWOT Analysis

After looking at the aforementioned background information, a traditional SWOT analysis has been performed.

Strengths

- Alumni database is organized and updated as information is received.
- Financial information is tracked each year and bank account is established for Association.
- Alumni Banquet is one event that gets individuals together each year and has shown promise to be a source of fundraising.
- Support and interest from people involved with the school and in the community who are loyal, hard-working individuals.
- School has solid reputation both academically and athletically.
- School has an established logo.

Weaknesses

- No real structure or organizational direction.
- Association is not a 501(c)(3) organization and cannot be marketed as such.
- Limited communication between the Association and its members – no website and email address not utilized.
- Email address contacts have not been organized.
- No consistent reserve of funds; amounts taken in cover what is spent.
- Logo sometimes used inconsistently.

Opportunities

- Potential partnerships with other local groups (i.e. Jr. Boosters, HOP Shoppe).
- Using technology (i.e. website, email, etc) as a cost-effective method of communication.
- Alumni 101 added to school curriculum – provides practical experience for students; cost-effective means to operations for Association.

- Potential availability of alumni members to donate areas of expertise in order to lay the foundation of the Association (i.e. accounting, legal, computer, etc).

Threats

- Current state of the economy.
- Fundraising efforts of other local groups and/or charitable causes
- Consolidation of schools

Limit on where state/federal funding can be spent as costs of education continue to rise.

Situation Analysis

Centralia High School is a 1A school in rural Kansas. It is a school with great academic and athletic tradition. The CHS Alumni Association is in place but has not reached its full potential to be an asset to both the school and to the community. The group has the support from the school faculty and staff, as well as, its alumni members. What the group lacks is a central organized effort for communication, fundraising, and growth. If the Association can be established as a 501(c)(3) organization, it can be legitimized as a funding source to Centralia Schools. The Association can then be marketed consistently and it can become a consistent, stable financial resource to Centralia Schools and its communities. Potential difficulties to overcome include:

- Time required to establish properly the organization as a 501(c)(3)
- Minimal budget
- Consistently and efficiently disseminating information to those without online access or for those who do not prefer online communication
- Current state of economy might deter potential donors
- Finding volunteers who are not already involved with multiple community projects

Core Problem / Opportunity

If the Centralia High School Alumni Association does not attain 501(c)(3) status, which would legitimize the organization as a funding source to Centralia Schools, communication and marketing efforts cannot be implemented; and the goal of becoming a consistent, stable financial resource to Centralia Schools and its communities is lost.

CHAPTER 2 - Action Planning

Communications Plan Goal

To establish a research-based communications plan for the CHS Alumni Association in order to build permanence in relationships between alumni members and the school, as well as, to secure the financial future of the organization.

Communications Plan Objectives

1. Provide the Steering Committee with a recommendation for an option to become a 501(c)(3) organization at the next meeting, January 2009.
2. Educate key publics about the revitalized image of Centralia High School Alumni Association by May 2009.
3. Increase attendance at Alumni Banquet from 225 to 235 by May 2009.
4. Increase attendance of young alumni from 17 to 27 by May 2009.
5. Encourage 25 members to sign up for online Panther Alumni Web-Site (PAWS) accounts by August 2009.
6. Obtain 50 email addresses of alumni members who want to receive email updates via Panther Alumni Listserv (PAL) by August 2009.
7. Host a Panther Tailgate Party for September 2009 Homecoming or “headliner” football game and encourage 25 young alumni members to attend.
8. Promote annual ‘Make Your Mark’ event to raise \$5,000 by May 2010.
9. Promote Panther 3D and encourage seven (7) alumni members to sign up for the donation option by August 2010.

Key Publics

Key Public 1: CHS Faculty and Staff

This group is underpaid for the work, time and energy they contribute on a daily basis to lives of students. They are concerned with the academic success and well-being of their students, and as such often reach into their own pockets. They help ensure a positive image and level of morale both internal and external to the school. Many of these individuals have families, and some of their children are going through or have gone through the Centralia School system.

Relationship with Organization

This group has provided positive feedback and encouragement for going forward with this endeavor. The Association realizes what an asset this group is to the success of the school and its students.

Self-Interests

- Rewarding students
- Quality of school and school improvement
- Financial stability and providing for family
- Quality of community

Message Design

The message needs to inform teachers that their efforts are appreciated, that they are appreciated. They should also know that the Association can be available as a resource.

Strategy One

To educate the group about the newly re-established Alumni Association and what it has to offer as a resource for their students and for their classrooms.

Tactic One: Alumni Introduction Letter

Strategy Two

To encourage the group to stay actively connected to the Alumni Association by receiving updates and by providing opportunities to recognize student and classroom achievements.

Tactic One: PAWS

Tactic Two: PAL

Tactic Three: Panther Tracks Newsletter

Subtactic One: Newsletter Story Submission Form

Subtactic Two: Newsletter Student Recognition Form

Key Public 2: Young Alumni

This group is not far removed from high school and is either pursuing post-secondary education or has entered the workforce directly. This group wants to find the most bang for their buck. These students do stay somewhat involved by coming back to support the school's athletic programs and other activities. While donations might not be what the association should look for

from this group, relationships with this group should be cultivated. Individuals in this group should be asked to participate in events at an inexpensive rate. They should be encouraged to stay involved and connected to what is going on with the school.

Relationship with Organization

There is minimal effort to be involved with the Alumni Association until the class reaches their 10-year reunion. The Association should cultivate relationships with this group to get them engaged early.

Self Interests

- Family and friends
- Finding inexpensive solutions
- Staying current with trends – what’s “in”
- Utilizing technology and online options

Message Design

The message needs to change the perception that the Alumni Association is an “old person’s” group. This younger group should know that it is cool to stay involved and actively participate with CHS Alumni Association.

Strategy One

To educate the group about the newly re-established Alumni Association and what it has to offer.

Tactic One: Alumni Introduction Letter

Strategy Two

To encourage the group to stay connected by signing up for online services with the Alumni Association.

Tactic One: PAWS

Tactic Two: PAL

Tactic Three: Panther Tracks Newsletter

Strategy Three

To increase attendance of this group at the annual Alumni Banquet.

Tactic One: Email invitation

Subtactic One: Facebook Invitation

Subtactic Two: Reduced Admission price

Subtactic Three: Draw for a \$500 scholarship

Strategy Four

To encourage active participation and attendance at young Alumni activities.

Tactic One: Panther Tailgate Party

Subtactic One: T-shirt for the first 25

Subtactic Two: Draw for scholarship

Future Tactic: Alumni Softball Tournament

Future Tactic: Alumni Volleyball Tournament

Key Public 3: Alumni Age 35+

This group is more established in various aspects of their lives – careers, families, etc.

There is more disposable income available. Saving for retirement, saving for college expenses of children or maybe making it through a pay period may be of concern. This group did not grow up with computers and the Internet. They might be more apprehensive about the release and security of personal information provided to groups with online services; however email seems to be a popular method of communication.

Relationship with Organization

This group attends the annual banquet most often when their class is being honored. The Association recognizes that in the previous two years, the majority of donations have been received from this group.

Self Interests

- Family
- Free time from job
- Building for their future and their children's future

Message Design

This message should be one of invitation for this group to be and stay connected to the school and to classmates. It will be one that requests financial contributions and one that offers recognition of those contributions.

Strategy One

To educate the group about the newly re-established Alumni Association and what it has to offer and keep these members connected to what's going on with the school.

Tactic One: Alumni Introduction Letter

Strategy Two

To encourage the group to stay connected with the Alumni Association and to sign up for online services that will enable them to do so.

Tactic One: PAWS

Tactic Two: PAL

Tactic Three: Panther Tracks Newsletter

Strategy Three

To increase attendance of this group at the annual Alumni Banquet.

Tactic One: Email invitation

Subtactic One: Radio Advertisement

Subtactic Two: Newspaper Advertisement

Strategy Four

To solicit donations one time per year and allow this group to determine where their donation can make a difference.

Tactic One: Donation letter and response card

Subtactic One: Thank you letter

Subtactic Two: Recognition of donors at annual banquet

Strategy Five

To provide alternative donation opportunities for alumni members to donate on their own accord.

Tactic One: Panther 3D (Direct Deposit Donation)

Subtactic One: Thank you letter

Subtactic Two: Recognition of donors at annual banquet

Key Public 4: Alumni Age 65+

This group is close to or past retirement age. They may have grandchildren whose school events/activities occupy their time. This group offers a unique donation opportunity as they are forced to take minimum distributions. Tax savings may be acknowledged if those distributions are donated to nonprofit organizations. This group has minimal access or interest in the Internet. Traditional means of communication should be used to reach this group.

Relationship with Organization

This group has minimal involvement with the Association short of attending annual banquet. This group might be involved with the school through the activities of grandchildren.

Self Interests

- Family and grandchildren
- Retirement and financial security
- Health expenses

Message Design

This message will play on the importance of strong future educational values for younger generations (i.e. grandchildren) coming up through the ranks. Security and stability in the Association's structure will be key.

Strategy One

To educate the group about the newly re-established Alumni Association and what it has to offer and keep these members connected to what's going on with the school.

Tactic One: Alumni Introduction Letter

Strategy Two

To encourage the group to stay connected with the Alumni Association and to sign up for online services that will enable them to do so.

Tactic One: PAWS

Tactic Two: PAL

Tactic Three: Panther Tracks Newsletter

Strategy Three

To increase attendance of this group at the annual Alumni Banquet.

Tactic One: CHSAA Alumni Banquet Invitation (already in place)

Subtactic One: Radio Ad

Subtactic Two: Newspaper Ad

Strategy Four

To solicit donations one time per year and allow this group to determine where their donation can make a difference.

Tactic One: Donation letter and response card

Subtactic One: Thank you letter

Subtactic Two: Recognition of donors at annual banquet

Strategy Five

To provide alternative donation opportunities for alumni members to donate on their own accord.

Tactic One: Panther 3D (Direct Deposit Donation)

Subtactic One: Thank you letter

Subtactic Two: Recognition of donors at annual banquet

CHAPTER 3 - Communication

Description of Tactics

Tactic: CHSAA Introduction Letter

This letter will inform alumni members of the Alumni Association's more organized existence, its efforts to be established as a permanent communication resource between members and the association, its plan for financial stability, and how members can help reach goals.

Product

8.5" x 11" one-page letter

Targeted Public(s)

School faculty and staff, young alumni members, alumni members age 35+ and alumni members age 65+

Desired action from public(s)

To increase awareness of the newly organized Association, to lay the foundation for member involvement, participation and donations.

Message to be conveyed

Tradition, Pride, Teamwork, Future – four key words that represent what the school is about and key words that are important to the success and longevity of the Association.

Method and location of distribution

Letters will be sent via regular mail to most current address listed in Alumni database; if email address is available, letters will be converted to email format and distributed that way.

Timing of distribution

These letters should go out at approximately the same time invitations to the alumni banquet are distributed if not a month sooner (March or April). Everyone should have received a letter no later than May 2009.

Design comments

Letter will be printed on Association letterhead. Letterhead will include panther head, alumni association insignia and slogan across the top of the page. A 3pt, solid black line will separate the 'header' from the text on the page. Contact information will be included across the bottom of the page. A 3 pt, solid black line will separate the 'footer' from the text on the page.

Alumni insignia will be in Freestyle Script, 28-pt font. Slogan immediately underneath the Association's insignia will be in orange, Calibri, 12-pt font. Contact information will be in Calibri, 12-pt font. All fonts are boldface.

For Example of Tactic see Appendix C – Figure 1

Tactic: Panther Tracks Newsletter

Newsletter will inform alumni members of the following information: current updates and activities at the school, spotlight student recognition, teacher corner, athletic update, clubs/organization update, spotlight alumni member(s), banquet information, photos, and any other current events. Photos both new and old will be included – current photos can show alumni what is going on now and past photos can conjure up memories which will create an emotional link to the school. Alumni members can have the opportunity to offer suggestions for newsletter content.

Product

Dimensions: 11" x 17"; *Printing:* 2 double-sided pages (4 pages total); *Fold:* half to 8.5" x 11"; 2nd fold in half to 4.25" x 5.5" for mailing; *Color:* color on front and back only; *Format:* Available in hard copy and PDF format; *Production:* CHS Alumni 101 class will produce

Targeted Publics

School faculty and staff, young alumni members, alumni members age 35+, alumni members age 65+.

Desired action from public(s)

To increase lines of communication between members and association, to inform members of the school's current events and achievements, and to provide members with feeling of involvement or connectedness.

Message to be conveyed

Get Connected with Panther Tracks: the newsletter will allow alumni members to track what is going on and in turn, the newsletter provides an added communication method that can be used to track where alumni members are.

Method and location of distribution

Newsletter will be mailed via regular mail. It will be available as an emailed version. Copies will be distributed to community businesses, and it will also be posted to PAWS.

Timing of distribution

Newsletter will be distributed two times a year – once at the beginning of December 2009 and once at the beginning of May 2010.

Design comments

Newsletter will include panther head, alumni association insignia and slogan across the top of the cover page. Back page will include alumni association insignia and slogan in upper-right corner. Web address for PAWS will be included at the bottom or each page. THEN and NOW photos included in a section.

For Example of Tactic see Appendix C – Figure 2

Tactic: PAWS

The Panther Alumni Web-Site will initially provide an additional line of communication and information disbursement to the members. It will provide a place for members to register, login securely, and trade contact information if desired. It will provide a place for members to update contact information. Eventually it will provide a place for members to RSVP and pay for the annual banquet, donate online and purchase Panther memorabilia.

Product

Template: designed using Microsoft Publisher. Content and simplistic format were considered. More sophisticated design and conventions may be added later.

Targeted Publics

School faculty and staff, young alumni members, alumni members age 35+, alumni members age 65+, and local community businesses

Desired action from public(s)

To continue to inform members of school current events; to encourage communication between classmates; to get members connected to the association; to offer an option for online payment and donations.

Message to be conveyed

Get Connected with PAWS -this site will provide an opportunity for relationships to form between alumni members and between alumni members and the school. Many people will not know that the Association is now newly organized.

Method and location of distribution

The launch of the website will be announced at the 2009 Alumni Banquet, include PAWS link in email blast, link to PAWS on Facebook, and web address listed on bottom of each page of Panther Tracks.

Timing of distribution

May 2009

Design comments

PAWS was designed with web usability and design concepts from Steve Krug. Panther head, alumni association insignia and slogan will be at the top of every page. Hyperlinks to each page will remain in a toolbar on the left-hand side of the paper – providing a link to the home page at all times. When a page opens it is clearly defined with a title. Online features such as being able to register, login, donate, RSVP, update information, search, make purchases will be added at a later date.

Font styles will include Verdana, boldface and Verdana, normal in various font sizes.

For Example of Tactic see Appendix C – Figure 3

Tactic: PAL

The Panther Alumni Listserv will be used to provide updates to alumni members. Updates will include information relating to PAWS usage, school current events, alumni banquet information and reminders, and any other pertinent alumni association details. In order for this to be effective, the alumni email database will need to be maintained.

Product

Template: designed using Microsoft Publisher. Content and simplistic format were considered.

Targeted Publics

Young alumni, alumni age 35+, alumni age 65+

Desired action from public(s)

To continue to inform members of school current events, to get members connected to the association.

Message to be conveyed

Get Connected with PAL – this listserv will provide an opportunity for relationships to form between alumni members and the school. Members can be informed of school updates, as well as be informed about the newly organized Association.

Method of distribution

Messages will be sent from the alumni association email address to any users who wish to sign up. Contacts will be kept in updated address book. Users can also have the option of being removed from PAL.

Location and timing of distribution

Users will begin receiving updates after initial sign-up at the 2009 banquet. Anticipated start date of PAL is August 2009.

Design comments

Emailed page will include a bar of black and white photos, both past and present across the top. A 5-pt, solid black line runs on the top and the bottom edges of the photos. A panther head, alumni association insignia and slogan are placed just below the photos prior to the opening greeting. A 2-pt, solid black line separates the association heading from the body of the message. A disclaimer will be listed near the bottom of the page. The page will end with another 2-pt, solid black line.

Alumni insignia will be in Freestyle Script, 28-pt font. Slogan immediately underneath the Association's insignia will be in orange, Calibri, 12-pt font. Body of the message is in Calibri, 10-pt font. The disclaimer is in Times New Roman, 9-pt font.

For Example of Tactic see Appendix C – Figure 4

Tactic: Email Invitation

Email invitations to the alumni banquet were used last year for the first time by the 10-year class president. The invitations were emailed only to members of the 10-year class; all other members received invitations via regular mail.

Product

Template: designed using Microsoft Publisher. Future use and design will include use of Adobe Photoshop and Dreamweaver or other website design software.

Targeted Publics

Young alumni, alumni age 35+

Desired action from public(s)

To encourage attendance at annual banquet, to encourage up-front payment of dinner reservations, and to donate payment for a dinner amount even if an individual does not plan to attend the banquet.

Message to be conveyed

Tradition, Pride, Teamwork – three of the four words that make up the Association's slogan that should resonate with this group whose experiences with CHS are not so far removed.

Method of distribution

Invitation will be emailed to any email addresses that are currently on the alumni contacts list.

Location and timing of distribution

These invitations will be sent out from the alumni email account and will be distributed approximately mid-April, 2009. The timing will correspond with the mailing of hard copy invitations.

Design comments

Emailed page will include a bar of black and white photos, both past and present across the top. A 5-pt, solid black line runs on the top and the bottom edges of the photos. A panther head, alumni association insignia and slogan are placed just below the photos prior to the opening greeting. A 2-pt, solid black line separates the association heading from the body of the message. A disclaimer will be listed near the bottom of the page. The page will end with another 2-pt, solid black line.

Alumni insignia will be in Freestyle Script, 28-pt font. Slogan immediately underneath the Association's insignia will be in orange, Calibri, 12-pt font. Body of the message is in Calibri, 10-pt font. The disclaimer is in Times New Roman, 9-pt font.

Design elements are the same as the email Listserv, content of message will change.

No tactic example.

Tactic: Panther Tailgate Party

This party will be open to all alumni members, faculty and staff, but will be especially targeted to the young alumni members. The purpose of this event will be to help shake the image that the Alumni Association is an ‘old person’ association. This will be centered around an athletic event with opportunities relevant to the age group. This party will be scheduled for either the Homecoming game or another “headliner” type of game.

Product

Minimum donation of \$5 will be required. Tailgate meal will be provided. First 25 to arrive and participate will receive a T-shirt. Members attending post-secondary educational opportunities will have the chance to win a \$500 scholarship.

Targeted Publics

Young alumni members

Desired action from public(s)

To encourage participation and involvement from young alumni members. To change attitude from ‘old person’ Association to one that they feel a part of.

Message to be conveyed

Future – this word taken from the Association’s 4-key word slogan should indicate a new era, a new opportunity to be involved. This group of alumni members are the future of the Association.

Method of distribution

This invitation will be sent out via PAWS, the email listserv, a Facebook group, and Nemaha County media.

Location and timing of distribution

Tailgate Party will be held at CHS Football Stadium in September, 2009 on date of Homecoming game or other “headliner” game TBD.

Design comments

This particular tactic will not have design comments. It will be more of the planning process of what supplies, items, volunteers, etc. are needed for the event.

No tactic example.

Tactic: Donation Letter and Response Card

This will be the major letter-writing campaign in order to solicit funds to establish the financial permanence of the Association. This campaign initiative will be to raise \$5000.

Product

Dimensions: 8.5" x 14" letter, bottom 8.5" x 3" will be tear-off response card, return envelope included.

Targeted Publics

Young alumni members, alumni members age 35+, and alumni members age 65+

Desired action from public(s)

To encourage donation of funds.

Message to be conveyed

Be Present for the Future...Make Your Mark Today – This message promotes the permanence and longevity of the Association. It also challenges the donor to make a difference, leave in impact today by contributing.

Tradition, Pride, Teamwork, Future – key words that represent what the school is about and key words that are important to the success and longevity of the Association.

Method of distribution

This letter will be mailed to the current addresses of each alumni member. The letter also will be converted to email format to send out at a time after the letter campaign is distributed.

Timing of distribution

May 2010

Design comments

Donors will be given the opportunity to donate to three areas – scholarships general operating expenses, or where funds are needed most. Bottom of letter will include perforated edge so that response card can be torn off and returned in the postage-paid envelope.

A panther head, alumni association insignia and slogan are placed just below the photos prior to the opening greeting. Alumni insignia will be in Freestyle Script, 28-pt font. Slogan immediately underneath the Association's insignia will be in orange, Calibri, 12-pt font. Body of the message is in Calibri, 10-pt font. The disclaimer is in Times New Roman, 9-pt font.

For Example of Tactic see Appendix C – Figure 5

Tactic: Panther 3D Form

This form will be available for alumni members or other community members to use to detail information necessary to set up deposit from paycheck directly to alumni association fund. It allows donor flexibility in that donors can choose to have a set amount automatically contributed. It might also be a less “painful” way to donate, meaning it is automatically contributed and donors do not have to physically part with the money by writing a check or swiping a card.

Product

Dimension: 8.5” x 11” form; available in both PDF and Microsoft Word formats.

Targeted Publics

Interested young alumni members, alumni members age 35+, alumni members age 65+, and any other non-alumni community members.

Desired action from public(s)

To encourage members to sign up for this service, to encourage consistent giving to the association.

Message to be conveyed

Tradition, Pride, Teamwork, Future – key words that represent what the school is about and key words that are important to the success and longevity of the Association.

Method of distribution

This form will be available at First National Banks: Centralia, Corning, and Seneca. This form will be made available online via PAWS, via the newsletter, and via the Listserv. This form will be available by contacting the alumni association board.

Timing of distribution

These forms will be available for use by May 2010.

Design comments

Panther head, alumni association insignia and slogan will be at the top of every page. A simple ‘form’ layout will include space for necessary banking information.

No tactic example.

Projected Expenses for CHSAA

Strategy	To educate about the Alumni Association's new existence and purpose.	Total Projected	Sponsored Credit	Actual Projected
Publics Affected	CHS Faculty/Staff, Young Alumni, Alumni age 35+ and Alumni age 65+			
Tactic	Alumni Introduction Letter (1250 quantity)	\$ 237.00	\$ -	\$ 237.00
	Envelopes (3000 quantity)	\$ 246.00	\$ -	\$ 246.00
	Public subtotal	\$ 483.00	\$ -	\$ 483.00
	Strategy subtotal	\$ 483.00	\$ -	\$ 483.00
Strategy	To encourage the group to stay connected to the Alumni Association.	Total Projected	Sponsored Credit	Actual Projected
Publics Affected	CHS Faculty and Staff			
Subtactics	Newsletter Story Submission Form	\$ 5.29	\$ 5.29	\$ -
	Newsletter Student Recognition Form	\$ -	\$ -	\$ -
	Public subtotal	\$ 5.29	\$ 5.29	\$ -
Publics Affected	Young Alumni and Alumni age 35+			
Tactics	Panther Alumni Web-Site (PAWS)	\$ -	\$ -	\$ -
	Hosting for Domain Name	\$ -	\$ -	\$ -
	Design - Adobe Photoshop	\$ 650.00	\$ 650.00	\$ -
	Development - Macromedia Dreamweaver	\$ 200.00	\$ 200.00	\$ -
	SSL Certificate (per year cost)	\$ 400.00	\$ 400.00	\$ -
	Shopping Cart	\$ -	\$ -	\$ -
	Online Payment Processing	\$ -	\$ -	\$ -
	Panther Alumni Listserv (PAL)	\$ -	\$ -	\$ -
	Alumni Newsletter (1000 quantity)	\$ 422.07	\$ -	\$ 422.07
	Public subtotal	\$ 1,672.07	\$ 1,250.00	\$ 422.07
Publics Affected	Alumni age 65+			
Tactic	Alumni Newsletter Mailing (1250)	\$ 174.00	\$ -	\$ 174.00
	Public subtotal	\$ 174.00	\$ -	\$ 174.00
	Strategy subtotal	\$ 1,851.36	\$ 1,255.29	\$ 596.07
Strategy	To increase attendance at the annual Alumni banquet.	Total Projected	Sponsored Credit	Actual Projected
Publics Affected	Young Alumni and Alumni age 35+			
Tactic	Email Invitation	\$ -	\$ -	\$ -
	Public subtotal	\$ -	\$ -	\$ -
Publics Affected	Young Alumni			
Tactic	Reduced Admission Price	\$ -	\$ -	\$ -
Subtactics	Scholarship Drawing	\$ 500.00	\$ 500.00	\$ -
	Radio Advertisement (Ad runs 4x over 6 days)	\$ 4.00	\$ -	\$ 4.00
	Newspaper Advertisement	\$ -	\$ -	\$ -
	Facebook Invitation	\$ -	\$ -	\$ -
	Public subtotal	\$ 504.00	\$ 500.00	\$ 4.00

<i>Publics Affected</i>	<i>Alumni age 35+</i>			
Subtactics	Radio Advertisement (Ad runs 4x over 6 days)	\$ 4.00	\$ -	\$ 4.00
	Newspaper Advertisement	\$ -	\$ -	\$ -
	Public subtotal	\$ 4.00	\$ -	\$ 4.00
<i>Publics Affected</i>	<i>Alumni Age 65+</i>			
Subtactics	Radio Advertisement (Ad runs 4x over 6 days)	\$ 4.00	\$ -	\$ 4.00
	Newspaper Advertisement	\$ -	\$ -	\$ -
	Public subtotal	\$ 4.00	\$ -	\$ 4.00
	Strategy subtotal	\$ 512.00	\$ 500.00	\$ 12.00
Strategy	To host and encourage participation and attendance at young alumni activities.	Total Projected	Sponsored Credit	Actual Projected
<i>Publics Affected</i>	<i>Young Alumni</i>			
Tactic	Panther Tailgate Party	\$ -	\$ -	\$ -
Subtactics	T-shirts	\$ 774.00	\$ 774.00	\$ -
	Scholarship Drawing	\$ 500.00	\$ 500.00	\$ -
	Radio Ad	\$ 12.00	\$ -	\$ 12.00
	Newspaper Ad	\$ -	\$ -	\$ -
	Public subtotal	\$ 1,286.00	\$ 1,274.00	\$ 12.00
	Strategy subtotal	\$ 1,286.00	\$ 1,274.00	\$ 12.00
Strategy	To implement one major donation drive for dollars.	Total Projected	Sponsored Credit	Actual Projected
<i>Publics Affected</i>	<i>Alumni age 35+ and Alumni age 65+</i>			
Tactic	Donation letter and response card (1250 quantity)	\$ 137.00	\$ -	\$ 137.00
Subtactic	Thank you Letter (1250 quantity)	\$ -	\$ -	\$ -
	Recognition of Donors at annual banquet	\$ -	\$ -	\$ -
	Public subtotal	\$ 137.00	\$ -	\$ 137.00
	Strategy subtotal	\$ 137.00	\$ -	\$ 137.00
Strategy	To provide alternative donation opportunities for members to donate on their own accord.	Total Projected	Sponsored Credit	Actual Projected
<i>Publics Affected</i>	<i>Alumni age 35+</i>			
Tactic	Direct Deposit Donation	\$ 5.29	\$ 5.29	\$ -
	Public subtotal	\$ 5.29	\$ 5.29	\$ -
<i>Publics Affected</i>	<i>Alumni age 65+</i>			
Tactic	Donation Form	\$ -	\$ -	\$ -
	Public subtotal	\$ -	\$ -	\$ -
	Strategy subtotal	\$ 5.29	\$ 5.29	\$ -
	CAMPAIGN GRAND TOTAL	\$ 4,274.65	\$ 3,034.58	\$ 1,240.07

2009 Proposed Timeline for Tactic Implementation

		MARCH 2009 - DECEMBER 2009												
MONTH		MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER			
WEEK		1 8 15 22 29	5 12 19 26	3 10 17 24 31	7 14 21 28	5 12 19 26	2 9 16 23	6 13 20 27	4 11 18 25	2 9 16 23	30 7 14 21 28			
Faculty & Staff														
<i>Introduction Letter</i>														
<i>PAWS</i>														
<i>Newsletter</i>														
<i>Story Submission Form</i>														
<i>Student Recognition Form</i>														
Young Alumni														
<i>Introduction Letter</i>														
<i>PAWS</i>														
<i>PAL</i>														
<i>Newsletter</i>														
<i>Email Invitation</i>														
<i>Reduced Admission</i>														
<i>Scholarship Drawing</i>														
<i>Tailgate Party</i>														
<i>T-Shirts</i>														
<i>Scholarship Drawing</i>														
<i>PTP Radio Ad</i>														
<i>PTP Newspaper Ad</i>														
<i>Facebook Invitation</i>														
Alumni age 35+														
<i>Introduction Letter</i>														
<i>PAWS</i>														
<i>PAL</i>														
<i>Newsletter</i>														
<i>Email Invitation</i>														
<i>Banquet Radio Ad</i>														
<i>Banquet Newspaper Ad</i>														
<i>Donation Letter and Response Card</i>														
<i>Thank You Letter</i>														
<i>Donor Recognition</i>														
<i>Panther 3D</i>														
Alumni age 65+														
<i>Introduction Letter</i>														
<i>Newsletter</i>														
<i>Banquet Radio Ad</i>														
<i>Banquet Newspaper Ad</i>														
<i>Donation Letter and Response Card</i>														
<i>Donation Form</i>														
<i>Thank You Letter</i>														
<i>Donor Recognition</i>														

JANUARY 2010 - OCTOBER 2010

2010 Proposed Timeline for Tactic Implementation

		JANUARY				FEBRUARY				MARCH				APRIL				MAY				JUNE				JULY				AUGUST				SEPTEMBER				OCTOBER								
MONTH		WEEK	3	10	17	24	31	7	14	21	28	7	14	21	28	4	11	18	25	2	9	16	23	30	6	13	20	27	4	11	18	25	1	8	15	22	29	5	12	19	26	3	10	17	24	31
Faculty & Staff		<i>Introduction Letter</i>																																												
<i>PAWS</i>																																														
<i>Newsletter</i>																																														
<i>Story Submission Form</i>																																														
<i>Student Recognition Form</i>																																														
Young Alumni		<i>Introduction Letter</i>																																												
<i>PAWS</i>																																														
<i>PAL</i>																																														
<i>Newsletter</i>																																														
<i>Email Invitation</i>																																														
<i>Reduced Admission</i>																																														
<i>Scholarship Drawing</i>																																														
<i>Tailgate Party</i>																																														
<i>T-Shirts</i>																																														
<i>Scholarship Drawing</i>																																														
<i>PTP Radio Ad</i>																																														
<i>PTP Newspaper Ad</i>																																														
<i>Facebook Invitation</i>																																														
Alumni age 35+		<i>Introduction Letter</i>																																												
<i>PAWS</i>																																														
<i>PAL</i>																																														
<i>Newsletter</i>																																														
<i>Email Invitation</i>																																														
<i>Banquet Radio Ad</i>																																														
<i>Banquet Newspaper Ad</i>																																														
<i>Donation Letter and Response Card</i>																																														
<i>Panther 3D</i>																																														
<i>Thank You Letter</i>																																														
<i>Donor Recognition</i>																																														
Alumni age 65+		<i>Introduction Letter</i>																																												
<i>Newsletter</i>																																														
<i>Banquet Radio Ad</i>																																														
<i>Banquet Newspaper Ad</i>																																														
<i>Donation Letter and Response Card</i>																																														
<i>Donation Form</i>																																														
<i>Thank You Letter</i>																																														
<i>Donor Recognition</i>																																														

CHAPTER 4 - Evaluation

Evaluation Criteria and Tools

Objective One

To provide the CHSAA Steering Committee with a recommendation for an option to become a 501(c)(3) organization at the next meeting.

Criteria for Success

This objective will be considered successful if the committee can select an option and have the filing process complete by May 2009.

Objective Two

To educate key publics about the revamped image of the CHSAA.

Criteria for Success

This objective will be considered successful if CHSAA Introduction Letters have been received by the annual banquet date in May 2009.

Objective Three

Increase overall attendance at alumni banquet from 225 to 245

Criteria for Success

This objective will be considered successful if the attendance at the 2009 alumni banquet draws 20 more people than the previous year's banquet.

Objective Four

Increase attendance at alumni banquet of young alumni from 17 to 27

Criteria for Success

This objective will be considered successful if the attendance at the 2009 alumni banquet draws 10 more young alumni members than the previous year's banquet.

Objective Five

Have 25 alumni members register for PAWS accounts by August 2009.

Criteria for Success

This objective will be considered successful if PAWS has been launched and 25 members have become registered users.

Objective Six

Obtain 50 email addresses from alumni members to receive email updates via PAL.

Criteria for Success

This objective will be considered successful if PAL has been launched and 50 members signed up to receive updates.

Objective Seven

Host Panther Tailgate Party in September 2009 and have 25 young alumni members in attendance.

Criteria for Success

This objective will be considered successful if the Panther Tailgate Party occurs and 25 young alumni members are in attendance to receive complimentary T-shirts and one receives a \$500 scholarship.

Objective Eight

Hold first annual “Make Your Mark” fundraising drive to raise \$5,000 for the Alumni Association fund.

Criteria for Success

This objective will be considered successful if by May 2010 the Alumni Association has increased by \$5,000.

Objective Nine

To have seven alumni members sign up for Panther 3D option.

Criteria for Success

This objective will be considered successful if by August 2010 seven members have signed up via Panther 3D Form.

References

- Association of Fundraising Professionals. (2007). *Economy slows charitable giving, fundraising in 2007*. Arlington, VA: AFP Research & Statistics.
- Baker, T. (2001). Content Strategy. *Fund Raising Management, July*, 37-41.
- Barnes III, R. (2001). Quick Tips for Writing and Designing a Good Response Card. *Fund Raising Management*, 32 (6), 47-48.
- Classmates. (n.d.) In Wikipedia online. Retrieved April 28, 2007, from <http://www.wikipedia.org>
- Council for Aid to Education. (2008). Contributions to colleges and universities up by 6.3 percent to \$29.75 billion. (February). New York, NY: Kaplan, Ann.
- Dugas, C. (2008, October 17). Q&A: Scared investors get help from financial advice hotline. *USA Today*.
- EDUCAUSE Learning Initiative. (September, 2006). *7 Things You Should Know About Facebook*. Retrieved on April 21, 2007 from www.educause.edu/eli.
- Fabrikant, G. (2008, September 30). Economy Expected to Take a Toll on Charitable Giving. *The New York Times*.
- Fine, A. (2006). Social Change and the Connected Age: Rock the Vote, Facebook, online social networking sites. *Chronicle of Philanthropy* 19.03 NA. Retrieved June 29, 2007, from Expanded Academic ASAP database.
- Gail, T., & Elmer, L.. (1994). Alumni Willingness to Give and Contribution Behavior. *Journal of Services Marketing*, 8 (4), 57-62.
- Hall, H. (2004). Charities Urged to Stop ‘Crass and Irrelevant’ Appeals. *Chronicle of Philanthropy* 16.24. Retrieved April 13, 2007, from Expanded Academic ASAP database.
- Hunter, C. S., Jones, E. B., & Boger, C. (1999). A Study of the Relationship between Alumni Giving and Selected Characteristics of Alumni Donors of Livingstone College, NC. *Journal of Black Studies*, 29 (4), 523-539.
- Kavanagh, M., and Hoff, B. (2006). It pays to plan ahead when creating your own website. *Website Design and Development*, 13 (3), 5-7.
- Kelly, K. (1991). *Fund Raising and Public Relations: A Critical Analysis*. Hillsdale, NJ: Hove and London Publishers.

- Kibble, K. (February 2008). *Recession-proof your fundraising*. Retrieved October, 17, 2008, from <http://www.resource-alliance.org/resources/enewsletter/499.asp>.
- Krug, S. (2000). *Don't Make Me Think: A Common-Sense Approach to Web Usability*. Indianapolis, IN: New Riders Publishing.
- Lagasse, P. (2008, January/February). The shifting bottom line: How the economy affects giving. *Advancing Philanthropy*, 20-25.
- McDermott-Griggs, S., & Card, J. A. (1992). Creating a Successful Fund-raising Letter. *Journal of Physical Education, Recreation & Dance*, 63 (1), 57-59.
- Paradis, T. (2008, October 17). Stocks end Friday with modest losses, up for week. *USA Today*.
- Pew Internet & American Life Project. (2006). *Are "Wired Seniors" Sitting Ducks?*. (April). Washington, D.C.: Fox, Susannah.
- Pratt, M. (2007). How to Build a Better Web Site. *Computerworld*, 41 (21), 31-34.
- Tsao, J. C., & Coll, G. (2005). To Give or Not to Give: Factors Determining Alumni Intent to Make Donations as a PR Outcome. *Journalism & Mass Communication Educator*, 59 (4), 381-392.
- Tuckman, H. P., Chatterjee, P., & Muha, D. (2004). Nonprofit Websites: Prevalence, Usage and Commercial Activity. *Journal of Nonprofit and Public Sector Marketing*, 12 (1), 49-67.
- Van Slyke, D. M., & Brooks, A. C. (2005). Why do People Give? New Evidence and Strategies for Nonprofit Managers. *American Review of Public Administration*, 35 (3), 199-222.
- Wallace, N. (2004). Colleges and Schools Send E-Mail Appeals. *Chronicle of Philanthropy*, 17.04: NA. Retrieved April 13, 2007, from Expanded Academic ASAP database.

Appendix A - Charts and Data

Figure 1 - Census Data CHS Communities

Town	Centralia	Corning	Vermillion
Town Population	534	170	107
County	Nemaha	Nemaha	Marshall
Top 3 Job Categories	1) Management, professional, and related; 2) Sales and office; 3) Service	1) Management, professional and related; 2) Sales and office; 3) Construction, extraction, and maintenance	1) Service; 2) Production, transportation, and material moving; 3) Farming, fishing, forestry
Average Commute	22 minutes	31 minutes	29 minutes
Median Household Income	\$ 22,240	\$ 27,250	\$ 24,167
Median Age	43.6	28.5	55.8

Figure 2 - 501(c)(3) Comparison

CHARACTERISTICS	S.T.E.P FOUNDATION (Striving to Ensure Progress)	USD 380 Endowment Association
Organization Mission	To promote the betterment of Seneca and Nemaha County community. To receive, administer and disburse funds for both charitable and educational purposes.	Moral obligation to understand the intent of the donor and invest to the best of its ability.
501 (c)(3) Status	Yes - tax exempt status	Yes - tax exempt status
Does CHS Alumni Foundation have its own identity under the umbrella of your 501(c)(3) status?	No	No
Can additional 'sub-funds' be created under the CHSAF identity/name?	No	No - more than one account can be established to help keep accounting straight.
How are funds submitted to our organization via yours?	Donors write checks to STEP Foundation. Foundation approves disbursement and issuance of checks.	Donors write checks to USD 380 Endowment Assoc. Assoc. approves disbursement and issues check.
Are donated funds invested?	Yes	Yes
What are the options for investment?	Depending on amount - interest bearing savings account or CD's	Determination made by Endowment Assoc. committee
Who handles the investing?	Donor and Foundation reach agreement.	Endowment Association committee
Are the dollars invested as one lump sum or is each account invested separately?	Invested separately.	Most often each account is invested separately for accounting purposes.
Is there a penalty if amounts have to be withdrawn?	Depends on the investment arrangement.	No
Can donated amounts be redirected to a different fund if CHS closes, consolidates or ceases to exist?	Donor stipulates in fund agreement a secondary purpose or cause. Purpose must be nonprofit in nature.	Money belongs to the Endowment Assoc. at point of donation. Donor should stipulate where funds should go in case the schools/district dissolves.
Does your organization handle related administrative tasks?	Yes	Yes
Disbursement of funds?	Yes	Yes
Tracking/monitoring intake and disbursement of funds?	Yes	Yes
Filing tax return?	Yes	Yes
Provide donor w/ proof of donation?	Yes	Yes - upon request.
What types of fees are associated with the services your organization offers?	\$100 setup fee; 10% earned income for administrative fees.	No fees associated. All costs covered by school district budget.
Is there a minimum fund amount that is required to be under your tax exempt umbrella?	\$10,000	No minimum amount - any amount/donation is welcome.
Contact / Contact Information	Gary Sparling: 785-336-6281	Patrick Meier: 785-382-6216

Figure 3 - Alumni Organization Comparison

School Name	Alumni Group	Organizational Structure	Fundraising Activities	Alumni Contact Name	Alumni Contact Info.
Axtell	Yes	21st graduating class sponsors banquet.	-	Rhonda Heinen	(785) 736-2389
Baileyville	Yes	Has alumni scholarship committee and alumni board.	Donations	Jeanie Holthaus	(785) 336-6669
Bern	Yes	Alumni responsibilities passed from class to class	-	Brent Lortscher	(785) 336-6633
Blue Valley	Yes	10 year class heads alumni.	-	Melody Pfaff	785-293-5256
Centralia	Yes	10 year class sponsors banquet.	Donations	Joy Glatczak	wjglatczak@bluevalley.net
Frankfort	Yes	10 year class sponsors banquet.	-	Tom Schroeder	schroedt@usd380.com
Hanover	Yes	Board meets third week of June.	-	Vonda Hynek	vhynek@bluevalley.net
Onaga	Yes	Separate alumni group.	Donation response card, scholarships, donor recognition.	Dana Correll	dcorrell@capfed.com
Valley Heights	Yes - also has community foundation	Has an alumni group and alumni foundation separate from school.	Gifts-in-kind, cash donations, life insurances, trusts	Susan Steinfert	(785) 363-7232
				Terry Blaser	tablaser@csbmarysville.com
Hayden	Yes - P.A.C.E.	PACE Organization	Auction, Bingo, Concessions, Golf Tournament, Annual solicitation	Linda Brungardt	brungardtl@haydenhigh.org
Hutchinson	Yes	Board of Directors	Donation Form	Judy Lindsey	(620) 665-4500
Nemaha Valley	Yes - also has community foundation	9-member BOD: 3YR terms	Donation response card, scholarships, contact foundation, board members	Brian Harris	bharris@nvschools.org

Figure 4 - Alumni Website Comparison (design)

School Name	Blue Valley	Frankfort	Hayden	Hutchinson	Marysville	Nemaha Valley (foundation)	Valley Heights (alumni)	Valley Heights (foundation)
School Website	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Alumni / Foundation Website	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Is the site appealing?	Yes	No	No	Yes	No	No	Yes	Yes
Why or Why not?	Simple, clean lines	Bad font, graphics	Too plain	Clean lines, cool graphics	Cookie cutter	Too plain	User friendly	User friendly
	No	No	No	No	No	No	Yes	Yes
	No	No	No	No	No	No	No	No
Five Areas of Effective User Visibility of Website	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes
	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes
	Yes	No	Yes	No	Yes	Yes	Yes	Yes
	Yes - not on every page	Yes	Yes - not on every page	Yes	No	Yes	Yes	Yes
Five Elements of Persistent Navigation (elements should be on every page)	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes
	No	No	No	No	Yes	No	No	No
	Yes	No	No	Yes	Yes	Yes	Yes	No

Figure 5 - Alumni Website Comparison (content)

School Name	Web Address	Website Content
Blue Valley	www.usd384.k12.ks.us	school news, in the spotlight, previous events, monthly newsletters, school news, alumni information
Frankfort	www.frankfort.usd380.com/2007-08/Student%20Life/Alumni/Main.html	Class listings, banquet details, broken link to newsletter, sale of school memorabilia
Hayden	www.haydenhigh.org/staff/pace/pace.htm	update alumni info, PACE contact info, links to fundraising events (concessions, bingo, auction, golf)
Hutchinson	www.hutchhighalumni.com	Newsletter, Wall of Honor, Financial Grants for HHS projects, required \$1 pledge, donation form, reunion/class site pages, school history
Marysville	http://www.marysvilleschools.org/vnews/display.vi?ART/2008/09/03/45019ffaa2267	News updates, stories, class reunion notes, links to class listings and pictures, sign up for news updates by entering email address
Nemaha Valley (foundation)	www.nvsschools.org/foundation/index.html	Mission statement, scholarships, board members and contact info, about the schools and area
Valley Heights (alumni)	http://www.valleyheightsalumni.com/index.php?option=com_frontpage&Itemid=1	secure login access, update profile, donation form, recent news, ways to donate, membership, projects
Valley Heights (foundation)	http://www.valleyheights.org/Foundation/Home.htm	secure login access, update profile, donation form, recent news, ways to donate, membership, projects

Figure 6 - Area Print Media

Community	Marysville	Sabetha	Seneca	Topeka
Population	3,271	2,589	2,122	122,100
Paper Name	Marysville Advocate	Sabetha Herald	The Courier-Tribune	Topeka Capital-Journal
Readership	5,284	2,200	3,200	Reaches 76% of state; reaches 8 of 10 adults with either weekday or Sunday edition of paper.
Readership Location	83% within state; 10% within county	50% within county	87.5% within state; 70% within county	10 areas of circulation – CHS communities in North Area.
Circulation	Weekly – Thursdays	Weekly	Weekly – Tuesdays	Daily
Story Submission	Stories can be submitted if no coverage is assigned; no charge if story considered news rather than promotion of event. Editor makes determination.	Stories can be submitted at no cost. Discretion of the Editor if story is published – space usually not an issue.	Stories submitted at no cost; if relates to money making event considered advertising and would have to be paid for as such.	Coverage determined by editor/reporters. Phone numbers and email addresses are available to contact individual departments regarding stories.
Advertising	Rates the same for both nonprofit and commercial organizations. Exceptions for some church events. No rates listed.	Ad rates are the same for all customers. No rates listed.	All advertising is charged at rate beginning at \$4 per column inch for local (in-county) customers.	Nonprofit rate is \$29.07 daily and \$36.39 Sunday.
Online Version	Yes – free to public	No	No	Yes – must register

Figure 7 - Area Broadcast Media

Community	Marysville	Seneca
Station	KNDY 95.5 FM; KNDY 1570 AM	KMZA 92.1 FM
Broadcast Reach	8 county service – Northeast KS – Southeast NE; 40,000 listeners	35-40 mile radius
Advertising Options	Calendar events - place event on public calendar; Ads that run for 20 or 30 seconds; Community bulletin board announcements	Radio classifieds
Purpose	Station will match any buy for a nonprofit fundraising event; Sometimes station donates ad time for fundraisers that solicit a donation; Match program used for community festivals, church fundraisers, entertainments, etc.	Designed for nonprofit school, civic, community, social services, youth and religious groups or organizations. Not intended for commercial business use.
Duration	Package of 10 or 20 20-second ads or 30-second ads; Bulletin board announcements run a day or two in advance, 4 times a day	Ads may run twice per day, seven days a week. Can be no longer than 35 words and may not run for more than 10 consecutive days.
Cost	10 or 20 20-second ads are \$3 each; 30-second ads are \$4 to \$5 depending on frequency; Bulletin board announcements are free for “free community events” such as meetings.	\$1 per broadcast or \$2 per day.

Appendix B - National Consumer Supporter Technical Assistance Center

ncstac



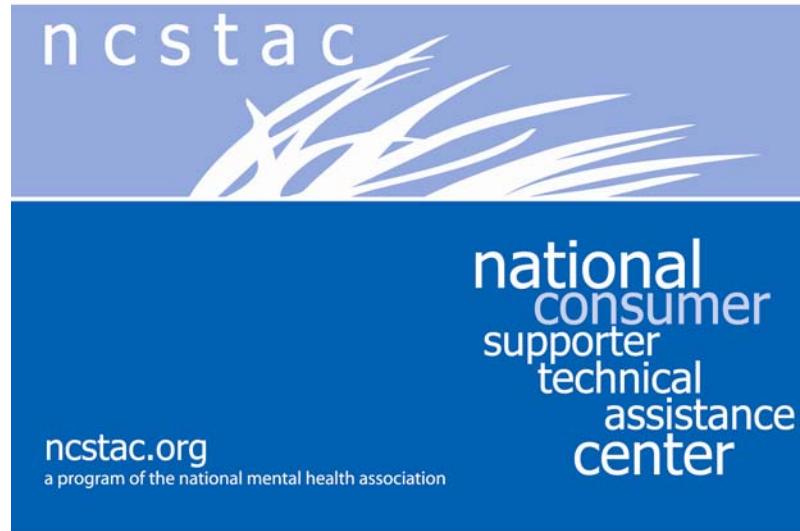
national
consumer
supporter
technical
assistance
center

ncstac.org

a program of the national mental health association

How to Establish a 501c3





How to Establish a 501c3

**National Consumer Supporter Technical Assistance Center
National Mental Health Association
2001 North Beauregard Street
Alexandria, VA 22311
Tel:1-800-969-NMHA Fax: 703-684-5968
E-Mail: ConsumerTA@nmha.org Web: www.ncstac.org**

The material contained in this volume may be used or reproduced without permission from the National Mental Health Association or the authors. Citation of the source is appreciated.



Funded by the Federal
Substance Abuse and Mental
Health Services Administration



How to Establish a 501c3

Acknowledgements

The National Mental Health Association's National Consumer Supporter Technical Assistance Center would like to thank the Substance Abuse and Mental Health Services Administration's Center for Mental Health Services for their support of NCSTAC. In addition, we thank the NCSTAC Advisory Council, with special acknowledgement to Bill Compton, for assistance in revising this document.





How to Establish a 501c3

Table of Contents

HOW TO USE THIS MANUAL.....	5
WHAT IS A 501(C)(3) ORGANIZATION?.....	5
THE STEPS TO ESTABLISHING 501(C)(3) STATUS: AN OVERVIEW.....	6
FORMULATING A MISSION STATEMENT	7
FORMING A BOARD OF DIRECTORS	8
FILING ARTICLES OF INCORPORATION	10
DRAFTING BYLAWS	11
DEVELOPING A BUDGET.....	12
SWOT ANALYSIS.....	14
VISION STATEMENT.....	15
DEVELOPING A RECORD-KEEPING SYSTEM	18
DEVELOPING AN ACCOUNTING SYSTEM.....	18
FILING FOR 501(C)(3) STATUS.....	19
APPLYING FOR A FEDERAL EMPLOYEE IDENTIFICATION NUMBER.....	19
FILING FOR STATE AND LOCAL TAX EXEMPTION.....	19
FULFILLING CHARITABLE SOLICITATION LAW REQUIREMENTS.....	20





How to Establish a 501c3

Table of Contents

APPLY FOR A NONPROFIT MAILING PERMIT	20
APPENDIX A - FORMING A BOARD OF DIRECTORS	21
APPENDIX B - SAMPLE ARTICLES OF INCORPORATION	22
APPENDIX C - SAMPLE BYLAWS	24
APPENDIX D – SAMPLE BUDGET	26





How to Establish a 501c3

How to Use this Manual

This manual provides an overview of the steps for consumer groups seeking to establish a 501(c)(3) organization, and a detailed explanation of what each of these steps entails. Appendices provide supplementary information and sample documents that may be helpful to execute each of the steps.

What Is a 501(c)(3) Organization?

Simply put, a 501(c)(3) organization is a type of nonprofit corporation classified by the IRS as either a “public charity” or a “private foundation.” Within those two broad categories, a 501(c)(3) is further designated as one or more of the following:

- Religious;
- Educational;
- Charitable;
- Scientific;
- Literary;
- Testing for Public Safety;
- Fostering National or International Amateur Sports Competitions; or
- Promoting the Prevention of Cruelty to Children or Animals.

What distinguishes nonprofits is not whether they can make surplus income, but rather what is done with any “profit.” A for-profit company that generates net revenue can choose to distribute those profits to owners and shareholders, executives, and employees. Nonprofit organizations don’t exist to earn money for owners, stakeholders or employees. In fact, distribution of profits is strictly prohibited, and must be used to further the mission of the organization. This distinction, not the ability to generate a profit, is a major difference between nonprofits and businesses.

As a result of its qualification as a 501(c)(3) organization, this type of nonprofit is able to receive tax-deductible charitable contributions, and is exempt from business income and property taxes.





How to Establish a 501c3

The Steps to Establishing 501(c)(3) Status: An Overview

<i>You must...</i>	<i>You should...</i>	<i>You can...</i>
1) Formulate a mission statement	—	—
2) Form a Board of Directors	—	—
3) —	File articles of incorporation	—
4) —	Draft Bylaws.	—
5) —	Develop a strategic plan.	—
6) —	Develop a business plan.	—
7) Develop a budget	—	—
8) Develop a record keeping system	—	—
9) Develop an accounting system	—	—
10) File for 501(c)(3) status	—	—
11) File for a Federal Employee Identification Number		
12) File for state tax exemption	—	—
13) File for local tax exemption	—	—
14) Fulfill charitable solicitation law requirements	—	—
15) —	—	Apply for a nonprofit mailing permit





How to Establish a 501c3

Formulating a Mission Statement

As a non-profit organization, you exist to accomplish your mission, which should be crafted based upon your purpose, services and values. The mission statement is a concise expression that covers in one or two sentences who the organization is, what it does, for whom and where. It should also be compelling, as it will be used in all published materials, funding requests and public relations.

A mission statement is often most powerful when it states not only what you do, but what you expect to accomplish through your organization's work. It should also portray how your organization is distinct from others. The Board of Directors should vote to officially adopt the mission statement.

Examples:

- The National Mental Health Association is dedicated to promoting mental health, preventing mental disorders and achieving victory over mental illnesses through advocacy, education, research and service.
- The National Consumer Supporter Technical Assistance Center's purpose is to strengthen consumer organizations by providing technical assistance in the forms of research, informational materials, and financial aid.
- The mission of Texas Mental Health Consumers is to organize, encourage, and educate mental health consumers in Texas. TMHC supports and promotes the mental health recovery process through peer directed and operated services, advocacy, economic development, and participation in public mental health policy design.
- On Our Own of Maryland is a state-wide mental health consumer education and advocacy organization that promotes equality in all aspects of society for people who receive mental health services and develops alternative, recovery-based mental health initiatives.





How to Establish a 501c3

Forming a Board of Directors

Forming a board requires careful thought and extensive recruitment efforts. Each state has regulations that determine the minimum size of the board, typically three, but the optimum number of people who sit on the board should be determined by the needs of the organization.

Based on what your organization would like to accomplish, you should decide what special skills and qualities you will require of the individuals on your board. The next step is to identify qualified individuals who are supportive of your mission and are willing to give of their talents and time.

Here are some tips for developing your Board of Directors

- Look for individuals whose values reflect your statement of purpose.
- Although it is recommended that the majority of your board be consumers, include the community at large, not just the mental health community. Consider the religious community, local service clubs, legal professionals, and colleges and universities as sources for prospective a Board of Directors.
- Do not overload people who already serve on many committees – seek a balance between old and new leadership.
- Specifically define the parameters of each position for which you are recruiting.
- Use networking. Start with core people and have them suggest other contacts.
- Contact people personally. Start with phone calls or visits, then follow up with letters.
- If possible, interview prospective members face to face.

Of course, it is not possible for any single individual to fulfill all of the board's requirements, but with the proper mix of members, the board should be able to meet its responsibilities. A sample profile for the fictitious Students' Mental Health League Board of Directors can be found on the next page. On the left are characteristics that would be useful for the board members to have. At the top, the names of each member are listed.





Sample Board Profile: Students' Mental Health League

	Karen	Carlos	Wanda	Gail	Oscar	Cliff	Judy
Needed Characteristics							
Consumer	✓	✓		✓	✓	✓	
Family Member			✓				✓
Student	✓	✓		✓	✓		✓
Health care professional						✓	
African-American			✓		✓		
Asian							
Hispanic		✓					
Native American						✓	
Experience with local advocacy			✓			✓	
Experience with state advocacy			✓		✓	✓	✓
Contacts with school board			✓				
Knowledge of children's issues	✓		✓				
Knowledge of depression issues	✓	✓	✓	✓			✓
Member of self-help groups	✓			✓	✓	✓	✓
Owns a car		✓	✓	✓		✓	✓
Experience in fundraising		✓		✓			✓





How to Establish a 501c3

Note the characteristics that are being sought for members of this board. The board recruiter seeks a culturally diverse group of individuals representing different ethnic minorities, and to include both consumers and family members on the board. Some of the board members have clinical expertise in children's issues; others in depression issues. Some members should have experience in local advocacy; others in state advocacy. See Appendix A for a blank profile chart that you can use to determine the characteristics needed on your board.

Filing Articles of Incorporation

Articles of Incorporation are an official statement of creation of an organization filed with the appropriate state agency. Articles of Incorporation are important to protect both board and staff from legal liabilities incurred by the organization, making the corporation the holder of debts and liabilities, not the individuals and officers who work for the organization.

The specific requirements governing how to incorporate are determined by each state. You can obtain the information you need to proceed with this step from your state Attorney General's office or your state Secretary's office.

A generic outline for the contents of Articles of Incorporation for a nonprofit organization is as follows:

Article 1: The name of the corporation.

Article 2: The name and address of the registered agent of the corporation. The registered agent is the person authorized to receive or sign legal papers on behalf of the corporation.

Article 3: The purpose(s) for which the corporation is being formed. You should, in this Article, indicate that the corporation is being formed as a 501(c)(3) tax-exempt organization.

Note: Carefully review your state's requirements as they relate to statements of purpose and tax-exempt status.

Article 4: A statement of the number of initial directors of the corporation and their names and addresses.





How to Establish a 501c3

Article 5: A statement defining the period of existence of the corporation—if it is indefinite, it would be defined as perpetual. If this is a short-term incorporation, you will state the period of time.

Article 7: A statement detailing the provisions for membership (if applicable) should include the member classifications, qualifications, obligations, rights and privileges. A recommended approach is to state that these provisions are included in the bylaws of the corporation, thus leaving you free to make changes without filing new papers with the Secretary of State

Article 8: This article should include the state's required language for a 501(c)(3) tax exempt corporation—this would refer to the operation of the corporation. To qualify for the 501(c)(3) tax exemption, you must state in the Articles of Incorporation that the corporation's assets are dedicated to tax-exempt purposes.

Article 5: The name(s) and address(es) of the person(s) who forms the corporation—signer(s) of the Articles of Incorporation (usually one of the initial directors, but not required to be).

See Appendix B for sample Articles of Incorporation

Drafting Bylaws

Bylaws are simply the “rules” of how the organization operates. Although Bylaws are not required to file for 501(c)(3) status, they will help you in governing your organization. Bylaws should be drafted with the help of an attorney and approved by the board early in the organization's development. The common format is as follows:

- The Name of the organization
- The Mission of the organization
- Membership (Responsibilities, Dues, Quorum, Voting Procedure)
- Board of Directors (Duties, Officers, Meetings)
- Committees
- Procedures for amending the bylaws
- Date bylaws were adopted by the board

See Appendix C for a template for creating bylaws.





Developing a Budget

Creating a budget is often one of the most challenging tasks when creating a nonprofit organization. The following guidelines are offered by the Nonprofit Financial Center in Chicago, Illinois.

New organizations may start the budgeting process by looking at potential income -- figuring out how much money they have to spend. A budget is the expression, in financial terms, of the plan of operation designed to achieve the objectives of an organization. An agency budget serves as a road map to help the organization plan the best use of resources, anticipate funding needs and monitor actual operations. It is an essential tool for effective management.

Remember--designing and managing a budget which accurately reflects your agency's funding and commitments is an essential cornerstone of responsible financial management. Solid, reliable budgets not only help organize and allocate resources, but they show donors, board members and contractors that you have made the long-range health of the agency a priority.

- **Step One:** Review your organization's mission, goals, and objectives. Evaluate existing programs and determine if your programs are currently meeting agency objectives and have the resources available to meet programmatic needs.
- **Step Two:** Determine the period for which you are planning your budget. Begin with your fiscal year: does it follow the calendar year or is it July 1 - June 31? Are your services required seasonally or all year round? Does it make sense to divide the budget into quarters or consider the full year at once?
- **Step Three:** Identify programs, projects, and services which your organization offers, or plans to offer. Each program should have its own budget so it can be viewed and assessed independently of the organization as a whole.
- **Step Four:** Determine program needs (number of staff, amount of space, equipment, furniture, supplies, etc.) Analyze program needs carefully. Once a budget is submitted for program funding, it is very difficult to amend the budget with additional program expenses.
- **Step Five:** Estimate costs of identified program needs. Are there hidden costs associated with running the program that the grant or contract does not cover? You must determine how much these resources will cost to avoid overruns.
- **Step Six:** Estimate the expected revenues of your organization. Include only the income you are certain or nearly certain of obtaining. Do you have a plan to secure funds for new programs in the start-up stage?
- **Step Seven:** Summarize information for each line item into totals, but note any assumptions or contingencies in the budget document. Notes can follow the budget through endnoting techniques.



How to Establish a 501c3

A common pitfall for many new businesses, nonprofit and for-profit, is creating a budget that is unrealistic. Where possible, it is a good business practice to slightly underestimate revenue and slightly overestimate expenses, to allow for unforeseen circumstances. The Board of Directors will need to approve the budget, which is a component of the IRS application for tax-exempt status.

See Appendix D for a sample budget format.

Developing a Strategic Plan

Strategic planning determines where an organization is going over the next one to three years, how it's going to get there and how it'll know if it got there or not. A strategic plan is not required by law, but your organization will run smoothly with one. A sound strategic plan should be developed and approved by the board in order to:

- Map the route to achieving the organization's mission.
- Serve as a framework for decisions or for securing support/approval.
- Explain the organization to others in order to inform, to motivate and to involve.
- Assist benchmarking & performance monitoring.
- Stimulate change and become a building block for the next plan.

A strategic plan should be:

- Visionary
- Conceptual
- Directional
- Realistic
- Obtainable





How to Establish a 501c3

If feasible, a consultant should be retained to facilitate the development of the strategic plan. The key elements of a strategic plan are as follows:

- Prepare a mission statement (see page 5)
- SWOT – Strengths, Weaknesses, Opportunities and Threats analysis
- Prepare a vision statement
- Develop a statement of corporate values and beliefs
- Identify key long term goals
- Based on goals, define achievable objectives
- Identify key strategies for meeting objectives
- Define strategic action plans

SWOT Analysis

A SWOT analysis considers your organization both internally and in a larger market context. The SWOT analysis paves the way to preparing your strategic plan and is actually conducted in two parts: Strengths and Weaknesses Analysis, and Opportunities and Threats Analysis.

Strengths and Weaknesses Analysis

Strengths and weaknesses analysis is essentially internal to the organization and relates to matters concerning resources, programs and organization in key areas:

- Marketing – promotion, support
- Management – systems, expertise, resources
- Operations – efficiency, capacity, processes
- Services – quality, features, range, competitiveness
- Finances – resources, performance
- Costs – productivity, purchasing
- Systems – organization, structures

Opportunities and Threats Analysis

Opportunities and threats analysis is essentially external to the organization and relates to matters such as competition or changing markets in key areas:

- The service area, which may be altered by economic or social forces such as changing customer needs, demographic issues and political factors.
- Competition from other organizations may create new threats or opportunities





How to Establish a 501c3

(identities, performances, market shares, likely plans, aggressiveness)

- New technologies may cause fundamental changes in services, processes, etc. (substitute services, alternative solutions)

Completing the SWOT review

Once the SWOT review is complete, the future strategy may be readily apparent or, as is more likely, a series of strategies will be evident. Use the SWOT to help identify possible strategies as follows:

- Build on strengths
- Resolve weaknesses
- Exploit opportunities
- Avoid threats

The resulting strategies can then be filtered and molded to form the basis of a realistic strategic plan.

Vision Statement

Your Vision Statement should express your organization's "big dream" for the future. In other words, what would the world, the nation or your community look like if you achieve your ultimate objective?

Examples:

- The National Mental Health Association envisions a just, humane and health society in which all people are accorded respect, dignity and the opportunity to achieve their full potential free from stigma and prejudice.
- The Substance Abuse and Mental Health Services Administration: *A Life in the Community for Everyone*
- The Arlington Mental Health Task Force envisions a community and families that support infants, children, youth, young adults, middle aged, and the aged in Arlington to develop their maximum potential emotionally, intellectually, and socially. We envision a community support system comprised of families, employers and neighborhoods that encourage self-help and mutual support. We envision a mix of human service agencies ready to intervene if self-help measures, the family, and the community are not sufficient to solve the problems of citizens.





How to Establish a 501c3

Values

The organization's values govern its conduct with society at large, customers, suppliers, employees, local community and other stakeholders.

Examples:

- Justice demands that everyone, regardless of disability, has the right and responsibility of full participation in society.
- Mental health is essential to the development and realization of every person's full potential.
- Sufficient resources need to be applied to a complete range of mental health research, and then effectively applied to treatment, community services design and preventive interventions.
- Services must be linguistically and culturally appropriate.

Goals

Goals are broad statements of what the organization needs or wants to achieve in the medium to long term. Goals should relate to the expectations and requirements of all the major stakeholders, including employees, and should reflect the underlying reasons for running the organization. These objectives could cover growth, profitability, technology, markets and services offered.

Examples:

- To improve community-based care in Prince William County.
- To protect the interests of individuals hospitalized in the Prince William County Psychiatric Hospital.
- To encourage the growth of consumer advocacy and self-help groups.





How to Establish a 501c3

Objectives

Objectives are specific, time-based measurements to be achieved by implementing strategies in pursuit of the organization's goals. They should be measurable, consistent, realistic and achievable.

Examples:

- To establish a new drop-in center by the end of next year.
- To conduct one on-site inspection, per quarter, of the Prince William County Psychiatric Hospital.
- To expand the current number of consumer self-help and advocacy groups in the county from one to three in the next two years.
- To achieve an annual budget of \$1 million in three years time.

Strategies

Strategies are the rules and guidelines by which the mission, goals and objectives may be achieved. They can cover the organization as a whole or they can relate to more specific matters in key functional areas.

Examples:

- Annual fundraising events will fund special projects.
- New services will progressively be added over the next 3 years.
- All promotional work will be contracted out to lower the organization's break-even point.
- An aggressive diversification policy will be pursued.



How to Establish a 501c3

Programs

Programs are the implementation plans for the key strategies. They should cover resources, objectives, time-frames, deadlines, budgets and performance targets.

Example:

(Strategy: XYZ Consumer Advocacy Network will pursue an aggressive diversification policy.)

- \$1,000 will be set aside to train staff members at the January conference on cultural competence.
- The Board of Directors will have a composition of 90% consumers in 2 years time, and at least 4 seats will go to individuals of color.
- Any staff vacancies that become available will preferably be filled by an individual of a minority population.
- \$1,000 will be set aside to increase the yearly circulation of the newsletter by twenty percent, with the additional copies being distributed to individuals of special populations

Developing a Record-Keeping System

Legally, you must save all Board documents including minutes and financial statements. It is necessary to preserve your important corporate documents, including board meeting minutes, bylaws, Articles of Incorporation, financial reports, and other official records. You should contact your appropriate state agency for more information on what records you are required to keep in the official files.

Developing an Accounting System

If your board does not include someone with a financial or accounting background, it is best to work with an accountant familiar with non-profit organizations. Nonprofits are accountable to the public, its funders, and, in some instances, government granting bodies, and it is vital to establish a system of controls (checks and balances) when establishing the organization's accounting practices.

Responsible financial management requires the establishment of an accounting system that meets both current and anticipated needs. The organization needs to open a bank account and ascertain whether to use the accrual or cash method of accounting. The difference between the two types of accounting is when revenues and expenses are recorded. In cash basis accounting, revenues are recorded when cash is actually received and expenses are recorded when they are actually paid (no matter when they were actually invoiced). In accrual basis



How to Establish a 501c3

accounting, income is reported in the fiscal period it is earned, regardless of when it is received, and expenses are deducted in the fiscal period they are incurred, whether they are paid or not.

The size of your organization and accounting skill of the person managing your financial record-keeping will likely determine which method to choose. It is recommended in Generally Accepted Accounting Principles, however, that for financial reporting, the accrual system should be used.

Filing for 501(c)(3) Status

To apply for recognition of tax-exempt, public charity status, obtain Form 1023 (application) and Publication 557 (detailed instructions) from the local IRS office. The filing fee depends upon the size of the organization's budget. The application is an important legal document, so it is advisable to seek the assistance of an experienced attorney when preparing it. Both of these documents can be downloaded from IRS web site at <http://www.irs.gov/charities/index.html>.

It is important to file your 1023 within 15 months of the date when your organization was established, or when your Articles of Incorporation were filed. Although the IRS automatically provides a 12-month extension, missing the deadline may result in your organization not receiving recognition as a private foundation.

Applying For a Federal Employee Identification Number

Regardless of whether or not you have employees, nonprofits are required to obtain a federal Employee Identification Number (EIN) — also referred to as the federal ID number. Available from the IRS, this number is used to identify the organization when tax documents are filed and is used not unlike an individual's Social Security number. If you received your number prior to incorporation, you will need to apply for a new number under the corporate name. Ask for Form SS-4 when applying for your EIN.

Filing for State and Local Tax Exemption

In accordance with state, county, and municipal law, you may apply for exemption from income, sales, and property taxes. Contact your state Department of Revenue, your county or municipal Department of Revenue, local Departments of Revenue, and county or municipal clerk's offices.





How to Establish a 501c3

Fulfilling Charitable Solicitation Law Requirements

If your organization's plans include fundraising, be aware that many states and few local jurisdictions regulate organizations that solicit funds within that state, county, or city. Usually compliance involves obtaining a permit or license and then filing an annual report and financial statement. Contact the state Attorney General's office, the state Department of Commerce, state and local Departments of Revenue and county or municipal clerk's offices to get more information.

Apply for a Nonprofit Mailing Permit

The federal government provides further subsidies for nonprofits with reduced postage rates on bulk mailings. While first-class postage rates for nonprofits remain the same as those for the for-profit sector, second- and third-class rates are substantially less when nonprofits mail to a large number of members or constituencies. For more information on eligibility, contact the U.S. Postal Service and ask for Publication 417, Nonprofit Standard Mail Eligibility (<http://pe.usps.gov/cpim/ftp/pubs/Pub417/Pub417.pdf>).





How to Establish a 501c3

Appendix A - Forming a Board of Directors

Using the chart below, create a profile for your own board. Note that each column of the board profile actually serves as a job description for the individuals you are seeking to recruit.

If you have already established your board, you can check off current members' skills in the first columns of the chart. You can then determine what skills your board is currently lacking and what types of individuals you may consequently need to recruit in the future.



Appendix B - Sample Articles of Incorporation

Please note that this sample may not conform to your state requirements. Be sure to verify your state's requirements before drafting Articles of Incorporation.

Articles of Incorporation of the undersigned individuals, who are 18 years of age or older, desiring to form a Nonprofit Corporation under the Nonprofit Corporation Law of Anystate, do hereby certify:

ARTICLE I — *NAME*

The name of the Corporation shall be Mental Health Consumers of ABC.

ARTICLE II — *REGISTERED AGENT ADDRESS*

The place in this state where the principal office of the Corporation is to be located is the City of ABC, XYZ County.

ARTICLE III — *PURPOSE*

Said corporation is organized exclusively for charitable, religious, educational, and scientific purposes, including, for such purposes, the making of distributions to organizations that qualify as exempt organizations under section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code. The purpose of this corporation is:

- To operate a peer-run drop in center for mental health consumers;
- To educate mental health consumers about mental health recovery; and
- To promote public awareness about mental health and eliminate stigma.

ARTICLE IV — *BOARD OF DIRECTORS*

The management of the affairs of the corporation shall be vested in a board of directors, as defined by the corporation's bylaws. No director shall have any right, title, or interest in or to any property of the corporation. The number of directors constituting the initial board of directors is four (4); their names and addresses are as follows:

John Doe 2013 Main Street, ABC, XY 00009

Jane Smith 11 Elm Street, ABC, XY 00009

Tom Johnson 222 Oak Street, ABC, XY 00009

Mary Brown 6721 Central Avenue, ABC, XY 00009

ARTICLE V- *DURATION/DISSOLUTION*

The duration of the corporate existence shall be perpetual until dissolution. Upon the dissolution of the organization, assets of the corporation shall be distributed for one or more exempt purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose.





How to Establish a 501c3

ARTICLE VI — *MEMBERSHIP*

This corporation shall have members. The eligibility, rights and obligations of the members will be determined by the organization's bylaws.

ARTICLE VII — *EXEMPTION REQUIREMENTS*

At all times the following shall operate as conditions restricting the operations and activities of the corporation:

1. No part of the net earnings of the organization shall inure to the benefit of, or be distributable to its members, trustees, officers, or other private persons, except that organization shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purpose set forth in the purpose clause hereof.
2. No substantial part of the activities of the corporation shall constitute the carrying on of propaganda or otherwise attempting to influence legislation, or any initiative or referendum before the public, and the corporation shall not participate in, or intervene in (including by publication or distribution of statements), any political campaign on behalf of, or in opposition to, any candidate for public office.
3. Notwithstanding any other provisions of this document, the organization shall not carry on any other activities not permitted to be carried on by an organization exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code or corresponding section of any future tax code, or by an organization, contributions to which are deductible under section 170(c) (2) of the Internal Revenue Code, or corresponding section of any future tax code.

ARTICLE VIII - *INCORPORATORS*

In witness whereof, we, the undersigned, have hereunto subscribed our names for the purpose of forming the corporation under the laws of the State of XYZ and certify we executed these Articles of Incorporation on May 15, 2004.

Signature 1

City, State Zip Code

Signature 2

City, State Zip Code

Signature 3

City, State Zip Code





Appendix C - Sample Bylaws

BYLAWS OF _____

ARTICLE I - NAME, PURPOSE

Section 1: The name of the organization shall be _____.

Section 2: The _____ is organized exclusively for charitable, scientific and educational purposes, more specifically to _____.

ARTICLE II - MEMBERSHIP

Section 1: Membership shall consist only of the members of the board of directors.

ARTICLE III - BOARD OF DIRECTORS

Section 1: Board Role, Size, Compensation. The Board is responsible for overall policy and direction of the Council, and delegates responsibility for day-to-day operations to the Council Director and committees. The Board shall have up to _____ and not fewer than _____ members. The board receives no compensation other than reasonable expenses.

Section 2: Meetings. The Board shall meet at least _____, at an agreed upon time and place.

Section 3: Board Elections. Election of new directors or election of current directors to a second term will occur as the first item of business at the annual meeting of the corporation. Directors will be elected by a majority vote of the current directors.

Section 4: Terms. All Board members shall serve _____ year terms, but are eligible for re-election.

Section 5: Quorum. A quorum must be attended by at least _____ percent of the Board members before business can be transacted or motions made or passed.

Section 6: Notice. An official Board meeting requires that each Board member have written notice two weeks in advance.

Section 7. Officers and Duties. There shall be five officers of the Board consisting of a Chair, Vice Chair, Secretary and Treasurer. Their duties are as follows:

The Chair shall convene regularly scheduled Board meetings, shall preside or arrange for other members of the executive committee to preside at each meeting in the following order: Vice-Chair, Secretary and Treasurer.

The Vice-Chair will chair committees on special subjects as designated by the board.





The Secretary shall be responsible for keeping records of Board actions, including overseeing the taking of minutes at all board meetings, sending out meeting announcements, distributing copies of minutes and the agenda to each Board members, and assuring that corporate records are maintained.

The Treasurer shall make a report at each Board meeting. Treasurer shall chair the finance committee, assist in the preparation of the budget, help develop fundraising plans, and make financial information available to Board members and the public.

Section 8: Vacancies. When a vacancy on the Board exists, nominations for new members may be received from present Board members by the Secretary two weeks in advance of a Board meeting. These nominations shall be sent out to Board members with the regular Board meeting announcement, to be voted upon at the next Board meeting. These vacancies will be filled only to the end of the particular Board member's term.

Section 9: Resignation, Termination and Absences. Resignation from the Board must be in writing and received by the Secretary. A Board member shall be dropped for excess absences from the Board if s/he has three unexcused absences from Board meetings in a year. A Board member may be removed for other reasons by a three-fourths vote of the remaining directors.

Section 10: Special Meetings. Special meetings of the Board shall be called upon the request of the Chair or one-third of the Board. Notices of special meetings shall be sent out by the Secretary to each Board member postmarked two weeks in advance.

ARTICLE IV - COMMITTEES

Section 1: The Board may create committees as needed, such as fundraising, housing, etc. The Board Chair appoints all committee chairs.

Section 2: The five officers serve as the members of the Executive Committee. Except for the power to amend the Articles of Incorporation and Bylaws, the Executive Committee shall have all of the powers and authority of the Board of Directors in the intervals between meetings of the Board of Directors, subject to the direction and control of the Board of Directors.

Section 3: Finance Committee. The Treasurer is chair of the Finance Committee, which includes three other Board members. The Finance Committee is responsible for developing and reviewing fiscal procedures, a fundraising plan, and annual budget with staff and other Board members. The Board must approve the budget, and all expenditures must be within the budget. Any major change in the budget must be approved by the Board or the Executive Committee. The fiscal year shall be the calendar year. Annual reports are required to be submitted to the Board showing income, expenditures and pending income. The financial records of the organization are public information and shall be made available to the membership, Board members and the public.



How to Establish a 501c3

ARTICLE V - AMENDMENTS

Section 1: These Bylaws may be amended when necessary by a two-thirds majority of the Board of Directors. Proposed amendments must be submitted to the Secretary to be sent out with regular Board announcements.

These Bylaws were approved at a meeting of the Board of Directors of

_____ on
_____, 200X.

Source: Minnesota Council of Nonprofits 2700 University Ave. W. #250 St. Paul, MN 55114
Phone: (612) 642-1904 Fax: (612) 642-1517 email: info@mncn.org

Appendix D – Sample Budget

<u>ORGANIZATION INCOME</u>		<u>Fiscal Year:</u>
<u>Source</u>	<u>Amount</u>	
Government grants	\$	
Foundation grants	\$	
Corporation grants	\$	
United Way or other federated campaigns	\$	
Individual contributions	\$	
Fundraising events and products	\$	
Membership or client fee income	\$	
In-kind support	\$	
Investment income	\$	
Other (specify)	\$	
Total Income	\$	

ORGANIZATION EXPENSES

<u>Item</u>	<u>Amount</u>
Salaries, wages and benefits	\$
Consultants and professional fees	\$
Depreciation	\$
Equipment	\$
In-kind expenses	\$
Insurance and/or other taxes	\$





How to Establish a 501c3

<u>Item</u>	<u>Amount</u>
Legal Fees	\$
Postage and delivery	\$
Printing and copying	\$
Rent and utilities	\$
Staff Training	\$
Supplies	\$
Telephone, fax & internet	\$
Travel	\$
Other (specify)	\$
	\$
Total Expense	
Difference (Income less Expense)	\$

Appendix E – Additional Resources

Alliance for Nonprofit Management
 1899 L Street, N.W., Suite 600
 Washington, DC 20036
 Phone: (202) 955-8406 Fax: (202) 955-8419
www.allianceonline.org

BoardSource
 1828 L Street, NW, Suite 900
 Washington, DC 20036-5401
 Phone (202) 452-6262.
<http://www.boardsource.org>

Independent Sector.
 1200 18th Street, NW, Suite 200
 Washington, DC 20036
 Phone (202)467-6100
www.IndependentSector.org





How to Establish a 501c3

The Management Assistance Program for Nonprofits
2233 University Avenue West, Suite 360
St. Paul, Minnesota 55114
Phone: (651) 647-1216
www.mapnp.org/library

The National Council for Nonprofit Associations.
1030 15th Street NW Suite 870
Washington, DC 20005-1525
Phone (202) 962-0322; Fax:(202) 962-0321
www.ncna.org

Nonprofit Financial Center in Chicago, Illinois
29 E. Madison St., Suite 1700
Chicago, Illinois 60602-4415
Phone: (312) 252-0420 Fax: (312) 252.0099
www.NFConline.org

Internet Nonprofit Center
www.nonprofit-info.org/

The IRS World Wide Web
www.irs.gov/bus_info/eo

Non-Profit Nuts and Bolts Web site
www.nutsbolts.com

Appendix C - Tactic Examples

Figure 1 – CHSAA Introduction Letter

CHS Alumni Association

TRADITION | PRIDE | TEAMWORK | FUTURE

Figure 2 – Panther Tracks Newsletter



Panther Tracks

UPCOMING EVENTS:

- Briefly highlight your point of interest here.

Inside this issue:

Inside Story 2

Inside Story 2

Inside Story 2

Inside Story 3

Inside Story 4

Inside Story 5

Inside Story 6

Volume I, Issue I

AUGUST 2009

Lead Story Headline

This story can fit 175-225 words.

The purpose of a newsletter is to provide specialized information to a targeted audience. Newsletters can be a great way to market your product or service, and also create credibility and build your organization's identity among peers, members, employees, or vendors.

First, determine the audience of the newsletter. This could be anyone who might benefit from the information it contains, for example, employees or people interested in purchasing a product or requesting your service.

You can compile a mailing list from business reply cards, customer information sheets, business cards collected at trade shows, or membership lists. You might consider purchasing a mailing list from a company. If you explore the Publisher catalog, you will find many publications that match the style of your newsletter.



Caption describing picture or graphic.

cations that match the style of your newsletter.

Next, establish how much time and money you can spend on your newsletter. These factors will help determine how frequently you publish the newsletter and its length. It's recommended that you publish your newsletter at least quarterly so that it's considered a consistent source of information. Your customers or employees will look forward to its arrival.

Secondary Story Headline

This story can fit 75-125 words.

Your headline is an important part of the newsletter and should be considered carefully.

In a few words, it should accurately represent the contents of the story and draw readers into the story. Develop the headline before you write the story. This way, the headline will help you keep the story focused.

Examples of possible headlines include Product Wins Industry Award, New Product Can Save You Time!, Membership Drive Exceeds Goals, and New Office Opens Near You.

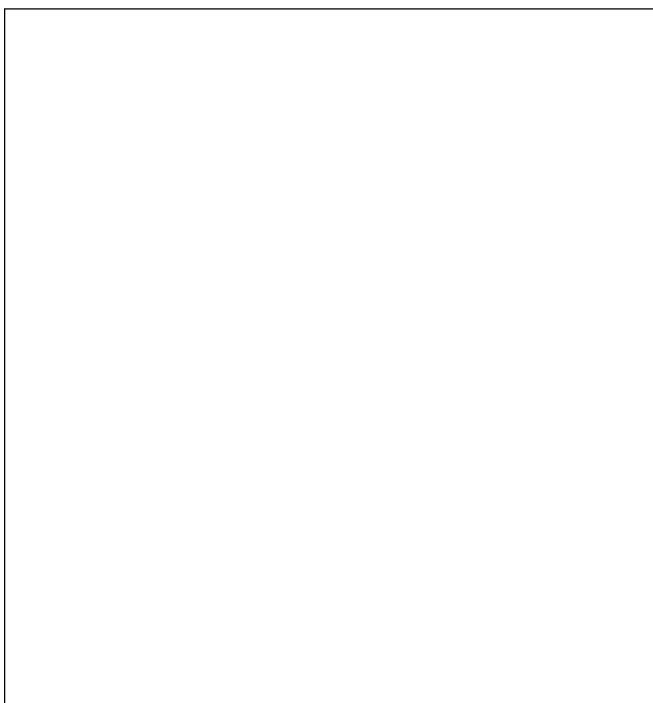
This story can fit 75-125 words.

Your headline is an important part of the newsletter and should be considered carefully.

In a few words, it should accurately represent the contents of the story and draw readers into the story. Develop the headline before you write the story.

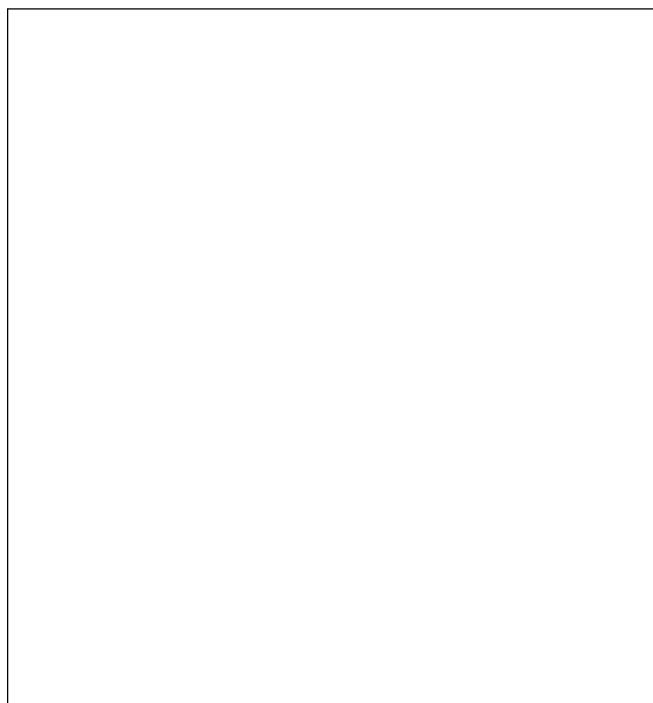
This way, the headline will help you keep the story focused.

That was THEN...



Caption for Photo—see above. This photo will depict a scene from past years.

This is NOW...



Caption for Photo—see above. This will be a current photo of the same scene from previous years.

Student Spotlight

This story can fit 75-125 words.

Selecting pictures or graphics is an important part of adding content to your newsletter.

Think about your article and ask yourself if the picture supports or enhances the message you're trying to convey. Avoid selecting images that appear to be out of context.

Microsoft Publisher includes thousands of clip art images from which you can choose and import into your newsletter. There are also several tools you can use to draw shapes and symbols.

Once you have chosen an image, place it close to the article. Be sure to place the caption of the image near the image.

This story can fit 75-125 words.

Selecting pictures or graphics is an important part of adding content to your newsletter.

Think about your article and ask yourself if the picture supports or enhances the message you're trying to convey. Avoid selecting images that appear to be out of context.

Microsoft Publisher includes thousands of clip art images from which you can choose and import into your newsletter. There are also several tools you can use to draw shapes and symbols.

Once you have chosen an image, place it close to the article. Be sure to place the caption of the image near the image.

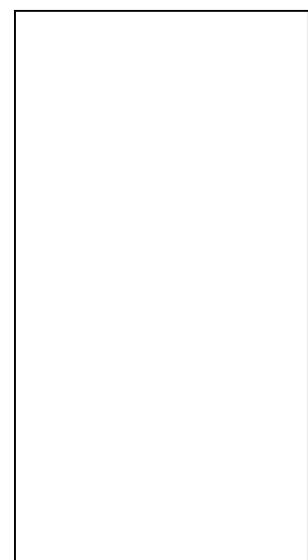
This story can fit 75-125 words.

Selecting pictures or graphics is an important part of adding content to your newsletter.

Think about your article and ask yourself if the picture supports or enhances the message you're trying to convey. Avoid selecting images that appear to be out of context.

Microsoft Publisher includes thousands of clip art images from which you can choose and import into your newsletter. There are also several tools you can use to draw shapes and symbols.

Once you have chosen an image, place it close to the article. Be sure to place the caption of the image near the image.



Caption for Photo—See Above.

Alumni Spotlight

This story can fit 75-125 words.

Selecting pictures or graphics is an important part of adding content to your newsletter.

Think about your article and ask yourself if the picture supports or enhances the message you're trying to convey. Avoid selecting images that appear to be out of context.

Microsoft Publisher includes thousands of clip art images from which you can choose and import into your newsletter. There are also several tools you can use to draw shapes and symbols.

Once you have chosen an image, place it close to the article. Be sure to place the caption of the image near the image.

"To catch the reader's attention, place an interesting sentence or quote from the story here."

This story can fit 75-125 words. Selecting pictures or graphics is an important part to adding content to your newsletter.

Think about your article and ask yourself if the picture supports or enhances the message you're trying to convey. Avoid selecting images that appear to be out of context.

Microsoft Publisher includes thousands of clip art images from which you can choose and import into your newsletter. There are also several tools you can use to draw shapes and symbols.

Once you have chosen an image, place it close to the article. Be sure to place the caption of the image near the image.

This story can fit 75-125 words. Selecting pictures or graphics is an important part to adding content to your newsletter.

Think about your article and ask yourself if the picture supports or enhances the message you're trying to convey. Avoid selecting images that appear to be out of context.

Once you have chosen an image, place it close to the article. Be sure to place the caption of the image near the image.

CLASSROOM CORNER *submitted by School Faculty*

This story can fit 100-150 words.

The subject matter that appears in newsletters is virtually endless. You can include stories that focus on current technologies or innovations in your field.

You may also want to note business or economic trends, or make predictions for your customers or clients.

If the newsletter is distributed internally, you might comment upon new procedures or improvements to the business. Sales figures or earnings will show how your business is growing.

Some newsletters include a column that is updated every issue, for instance, an advice column, a book review, a letter from the president, or an editorial. You can also profile new

employees or top customers or vendors.

This story can fit 100-150 words.

The subject matter that appears in newsletters is virtually endless. You can include stories that focus on current technologies or innovations in your field.

You may also want to note business or economic trends, or make predictions for your customers or clients.

If the newsletter is distributed internally, you might comment upon new procedures or improvements to the business. Sales figures or earnings will show how your business is growing.

Some newsletters include a column that is updated every issue.

Photo of Teacher who submitted story.

Text box will include facts and brief bio highlights of teacher's career and accomplishments.

This newsletter was created by the **CHS Alumni 101** class. By producing this newsletter, these students are obtaining practical English, writing, editing and design skills that can be used to enhance future educational experiences.



PAWS (Panther Alumni Web-Site)

Find more alumni and school news and information at the following online site:

[http://
alumni.centralia.usd380.com](http://alumni.centralia.usd380.com)



HOW CAN YOU HELP?

The Panther PRINT is a self-sustaining media. If you would like to aid in the production costs of the newsletter please view our website for donation options or call 785-565-4174.



EMAIL ME

If you would prefer to receive this newsletter via email rather than a mailed hard copy please send an email to chsalumni@usd380.com.



PLEASE REMOVE

If you would like to be removed from the newsletter mailing list, please send an email to chsalumni@usd380.com or call 785-565-4174.

School Story

This story can fit 150-200 words.

One benefit of using your newsletter as a promotional tool is that you can reuse content from other marketing materials, such as press releases, market studies, and reports.

While your main goal of distributing a newsletter might be to sell your product or service, the key to a successful newsletter is making it useful to your readers.

A great way to add useful content to your newsletter is to develop and write your own articles, or include a calendar of upcoming events or a special offer that promotes a new product.

You can also research articles

or find "filler" articles by accessing the World Wide Web. You can write about a variety of topics but try to keep your articles short.

Much of the content you put in your newsletter can also be used for your Web site. Microsoft Publisher offers a simple way to convert your newsletter to a Web publication. So, when you're finished writing your newsletter, convert it to a Web site and post it.

This story can fit 150-200 words.

One benefit of using your newsletter as a promotional tool is that you can reuse content from other marketing materials, such as press releases, market studies, and reports.

While your main goal of distributing a newsletter might be to sell your product or service, the key to a successful newsletter is making it useful to your readers.

A great way to add useful content to your newsletter is to develop and write your own articles, or include a calendar of upcoming events or a special offer that promotes a new product.

Much of the content you put in your newsletter can also be used for your Web site. Microsoft Publisher offers a simple way to convert your newsletter to a Web publication.

NEWS | ACTIVITIES | EVENTS | MORE

ACTIVITIES

DECEMBER

19—Donate to CHS Alumni Association via Panther 3D (Direct Deposit Donations) - stop by Centralia First National Bank for details.

22—Christmas Coat Drive: take any coats you might not need anymore and donate them to an individual who does need to stay warm this winter.

JANUARY

2—Sophomore Class Spaghetti Supper

19—Basketball HOME vs. Frankfort—6:15 PM.

FEBRUARY

26—Junior Class Magazine Sales conclude

MARCH BIRTHDAYS

19—Brandon Wehling

25—Theresa Rethman

31—Terry Rethman

APRIL

3—Be on the look-out for your annual alumni banquet invitation. If you would like to receive your invitation via email please send your contact information in an email to chsalumni@usd380.com.

27—Spring Music Festival—7PM New Gym

MAY

31—2009 Alumni Banquet

SUBMIT STORY IDEAS

If you would like to submit a story idea or if you know an alumni member who has an interesting story to tell, please send an email with the subject line "ALUMNI STORY IDEA" to chsalumni@usd380.com.

SUBMIT PICTURES

If you have a picture you think would fit with the content of the alumni newsletter, send it to us via email or regular mail! The photo will be scanned in and returned to you if sent via regular mail.

Mail to:

Kristin Waller, 1505 Wreath Ave., Manhattan, KS 66503

Figure 3 – PAWS



CHS ALUMNI ASSOCIATION

TRADITION | PRIDE | TEAMWORK | FUTURE

Home

Register Here

CHS Graduates

CHS History

CHS Alumni Fund

Forms

Calendar

Related Links

About Us

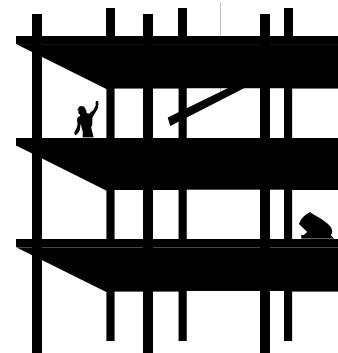
Contact Us

FAQ

Welcome to Panther Alumni Web-Site (PAWS)

This is the first page of your Web site that visitors will see. On this page, explain your site's purpose, content, and layout. Include tips on how to move through your site and where to find key information.

Change the picture to one of your own, such as a picture of your company or your company's logo.



The CHS Alumni Association is sponsored by "Community Organization(s) to be named at a later date."

To contact us:

Phone
785-857-3324

[Home](#) | [Register](#) | [Calendar](#) | [Related Links](#) | [About Us](#) | [Contact Us](#) | [FAQ](#)



Home

Register Here

CHS Graduates

CHS History

CHS Alumni Fund

Forms

Calendar

Related Links

About Us

Contact Us

FAQ

Register Here

By registering and obtaining an alumni account, you gain access to post any information you might like to share with fellow CHS graduates. You also gain access to any information that other graduates have already posted. The public will be able to see your name, the year you graduated, and an opportunity to email. **HOWEVER**, in order for an individual to view information and email, the user must be registered.

To contact us:

Phone
785-857-3324

[Home](#) | [Register](#) | [Calendar](#) | [Related Links](#) | [About Us](#) | [Contact Us](#) | [FAQ](#)



[Home](#)

[Register Here](#)

[CHS Graduates](#)

[CHS History](#)

[CHS Alumni Fund](#)

[Forms](#)

[Calendar](#)

[Related Links](#)

[About Us](#)

[Contact Us](#)

[FAQ](#)

Centralia High School Graduates

Click on the links to view class rosters for each graduating class at Centralia High School from 1923 to 2008.

To contact us:

Phone
785-857-3324

[Home](#) | [Register](#) | [Calendar](#) | [Related Links](#) | [About Us](#) | [Contact Us](#) | [FAQ](#)



Home

Register Here

CHS Graduates

CHS History

CHS Alumni Fund

Forms

Calendar

Related Links

About Us

Contact Us

FAQ

Centralia High School History

This page will discuss the formation and establishment of Centralia High School, consolidation with Corning Schools, and more. This page will preserve the history and tradition of the school should the school cease to exist. This page will also allow current students to have an understanding of the school's history.



Logo created by
Kara (Nordhus) Palan ('98)

To contact us:

Phone
785-857-3324

[Home](#) | [Register](#) | [Calendar](#) | [Related Links](#) | [About Us](#) | [Contact Us](#) | [FAQ](#)



Home

Register Here

CHS Graduates

CHS History

CHS Alumni Fund

Forms

Calendar

Related Links

About Us

Contact Us

FAQ

CHS Alumni Fund

What is the Alumni Fund

This page will detail the Alumni Fund. How it was established, how it will be used, how individuals can donate, and more.



Caption describing picture or graphic.

To contact us:

Phone
785-857-3324

[Home](#) | [Register](#) | [Calendar](#) | [Related Links](#) | [About Us](#) | [Contact Us](#) | [FAQ](#)



Home

Register Here

CHS Graduates

CHS History

CHS Alumni Fund

Forms

Calendar

Related Links

About Us

Contact Us

FAQ

Forms

The page provides access to important forms for alumni members, as well as faculty and staff. Each available form is listed with a corresponding description.

Donation Form

This form is available for individuals who wish to donate directly to the CHS Alumni Association. This form should be printed and submitted to the address listed on the form.

- [Donation Form \(PDF\)](#)
- [Donation Form \(word doc.\)](#)
- [Tell me more about the Donation Form](#)

QUESTIONS? Email: chsalumni@usd380.com

Panther 3D (Direct Deposit Donation) Form

This form is available to individuals who wish to set up a direct deposit donation through Panther 3D Program. Donations can be automatically deducted from an individual's paycheck and donated directly to the CHS Alumni Association.

- [Panther 3D Form \(PDF\)](#)
- [Panther 3D Form \(word doc.\)](#)
- [Tell me more about Panther 3D](#)

QUESTIONS? Email: chsalumni@usd380.com

Student Recognition Form (for school faculty only)

This form is available for school faculty and staff to nominate a student who has excelled and/or showed improvement in the classroom. The student will be featured in the alumni newsletter.

- [Student Recognition Form \(PDF\)](#)
- [Student Recognition Form \(word doc.\)](#)

QUESTIONS? Email: chsalumni@usd380.com

Newsletter Story Submission Form

This form is available to school faculty/staff as well as alumni members who want to submit a story idea. The story will be printed in the alumni newsletter.

- [Student Recognition Form \(PDF\)](#)
- [Student Recognition Form \(word doc.\)](#)

QUESTIONS? Email: chsalumni@usd380.com

To contact us:

Phone
785-857-3324



[Home](#)

[Register Here](#)

[CHS Graduates](#)

[CHS History](#)

[CHS Alumni Fund](#)

[Forms](#)

[Calendar](#)

[Related Links](#)

[About Us](#)

[Contact Us](#)

[FAQ](#)

Calendar

November 2008

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Schedule of Events

- 00/00/00 — Type the date of an upcoming event. Type the name of the event, the time, location, and a phone number to call for more information.

[More details...](#)

- 00/00/00 — Type the date of an upcoming event. Type the name of the event, the time, location, and a phone number to call for more information.

[More details...](#)

- 00/00/00 — Type the date of an upcoming event. Type the name of the event, the time, location, and a phone number to call for more information.

[More details...](#)

- 00/00/00 — Type the date of an upcoming event. Type the name of the event, the time, location, and a phone number to call for more information.

[More details...](#)

To contact us:

Phone
785-857-3324



Home

Register Here

CHS Graduates

CHS History

CHS Alumni Fund

Forms

Calendar

Related Links

About Us

Contact Us

FAQ

Related Links

[Centralia High School](#)

This link will take you to the High School's homepage. For school events, activities, and information this site has been included for your viewing interest.

[Marysville Advocate](#)

This is one of the area newspapers that does offer online access. There is limited news coverage of Centralia Schools and surrounding communities. However, quality sports coverage of Centralia athletics is available.

[First National Bank—Centralia, Corning, Seneca](#)

This link will connect you with one of the main area banks. First National Bank is a great supporter of community and area happenings.

[USD 380](#)

This link will take you to the homepage of Unified School District 380. For District calendar of events, contacts, and information for both Centralia and Frankfort schools, this site has been included.

[KMZA Radio—92.1 FM](#)

This link will take you to one of the main area radio stations. For updates, community postings, weather, live broadcasts and more, follow this link. Annual reunion information will be advertised via this radio station.

[Northeast Kansas Sports](#)

This link takes you to up-to-date coverage of area schools in NE Kansas. This is a fantastic link for local Centralia athletic coverage.

[Topeka Capital-Journal](#)

This link will take you to a major newspaper located in Topeka, KS.

To contact us:

Phone
785-857-3324

[Home](#) | [Register](#) | [Calendar](#) | Related Links | [About Us](#) | [Contact Us](#) | [FAQ](#)



Home

Register Here

CHS Graduates

CHS History

CHS Alumni Fund

Forms

Calendar

Related Links

About Us

Contact Us

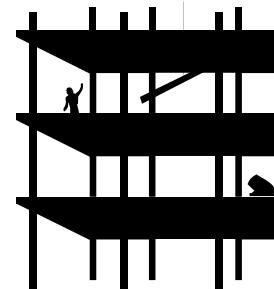
FAQ

CHS Alumni Association

Tell customers about your company or organization. Include a brief description of your employees, the products or services you provide, and your company's goal or mission statement.

Change the picture to one of your own, such as a picture of your CEO, a major product, or your company headquarters.

Lore ipsum dolor sit amet, consectetuer adipiscing elit, sed diem nonummy nibh euismod tincidunt ut lacreet dolore magna aliquam erat volutpat. Ut wisis enim ad minim veniam, quis nostrud exerci tution ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat.



Caption describing picture or graphic.

Lore ipsum dolor sit amet, consectetuer adipiscing elit, sed diem nonummy nibh euismod tincidunt ut lacreet dolore magna aliquam erat volutpat. Ut wisis enim ad minim veniam, quis nostrud exerci tution ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat.

To contact us:

Phone
785-857-3324

[Home](#) | [Register](#) | [Calendar](#) | [Related Links](#) | [About Us](#) | [Contact Us](#) | [FAQ](#)



Home

Register Here

CHS Graduates

CHS History

CHS Alumni Fund

Forms

Calendar

Related Links

About Us

Contact Us

FAQ

Contact Us

To contact us:

CHS Alumni Association

Mailing Address

c/o John Whetzal
507 John Riggins Ave.
Centralia, KS 66415

Phone

785-857-3324

Fax

785-532-2296

Email

chs alumni@usd380.com

To contact us:

Phone
785-857-3324

[Home](#) | [Register](#) | [Calendar](#) | [Related Links](#) | [About Us](#) | [Contact Us](#) | [FAQ](#)



Home

Register Here

CHS Graduates

CHS History

CHS Alumni Fund

Forms

Calendar

Related Links

About Us

Contact Us

FAQ

Frequently Asked Questions

What happens if I lose my password or cannot remember my login information?

Type a brief answer to the question. To add more questions, copy and paste additional text boxes.

What is the CHS Alumni Fund?

Type a brief answer to the question. To add more questions, copy and paste additional text boxes.

How can I contribute to the CHS Alumni Fund?

Type a brief answer to the question. To add more questions, copy and paste additional text boxes.

What is the Panther 3D (Direct Deposit Donation) Program?

Type a brief answer to the question. To add more questions, copy and paste additional text boxes.

How do I sign up for the Panther 3D Program?

Type a brief answer to the question. To add more questions, copy and paste additional text boxes.

Is the information on this site secure?

Type a brief answer to the question. To add more questions, copy and paste additional text boxes.

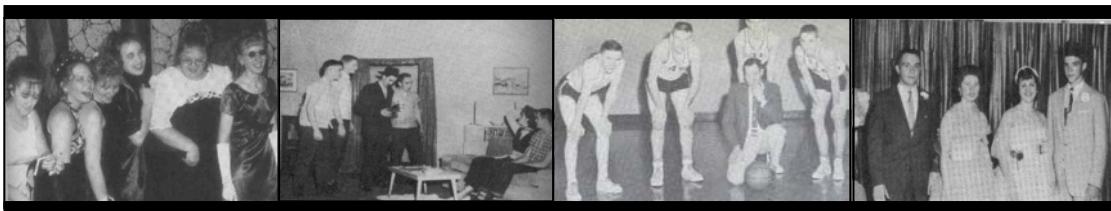
Is it possible to submit donations online?

Type a brief answer to the question. To add more questions, copy and paste additional text boxes.

To contact us:

Phone
785-857-3324

Figure 4 – PAL



CHS Alumni Association

TRADITION | PRIDE | TEAMWORK | FUTURE

Dear Alumni Member,

Write a letter to a customer, client, or friend. You can create a letter for a specific individual, or create a form letter that you then personalize for each recipient.

When you write a letter, it's a good idea to be aware of the audience you want to reach. Business letters are more effective when they follow a more formal structure. Letters to friends can be less formal in tone.

Lore ipsum dolor sit amet, consectetuer adipiscing elit, sed diem nonummy nibh euismod tinidunt ut lacreet dolore magna aliquam erat volutpat. Ut wisis enim ad minim veniam, quis nos-trud exerci tution ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat.

Sincerely,

CHS Alumni Association

To remove your name from this email list, please email chsalumni@usd380.com or call 785-565-4174.

Figure 5 – ‘Make Your Mark’ Donor Letter / Response Card



CHS Alumni Association

TRADITION | PRIDE | TEAMWORK | FUTURE

November 17, 2008

Dear Alumni Member

BE PRESENT FOR THE FUTURE...MAKE YOUR MARK TODAY.

Yes, I want to donate to the CHS Alumni Association annual fund.

Other \$ _____

\$ 50

\$ 100

\$ 25

\$ 75

\$20

Please designate my contribution for:

Scholarships

General Operating Expenses

Where it is needed most.

Kristin Waller

1505 Wreath Ave.

Manhattan, KS 66503

I have enclosed the following method of payment.

I have enclosed a check made payable to the **CHS Alumni Association**.

Please charge my credit card:

American Express Discover Master Card VISA

Name on Card: _____

Account Number: _____

Expiration Date: _____

Signature: _____

If paying with your credit card, you may also donate online at
<http://alumni.centralia.usd380.com>

To make your gift, please detach and complete this form, and return in the enclosed envelope. Thank you for making your mark!

Appendix D - Power Point Presentation

Centralia High School Alumni Association: A Research-Based Communications Plan



Project Goal

- To establish a research-based communication plan for the CHSAA in order to build permanence in relationships between alumni members and the school, as well as, to secure the financial future of the organization.



AGENDA

- Introduction of CHS and CHSAA
- CHSAA SWOT Analysis
- Analysis of Key Publics
- Identification of
 - Supporting Research and Objectives
 - Related tactics and keys to success
- Projected expenses
- Conclusions and Questions



Centralia High School

- Located in Centralia, KS
- 1A classification according to KSHSAA
 - Average size of graduating class 17
- Enrollment drawn Centralia, Corning, and Vermillion
 - Total population approximately 811
- Academic and athletic successes



Centralia High School Alumni Association (CHSAA)

- 1,243 alumni members
- Alumni banquet is only activity
- No actual budget
- Minimal communication with alumni members
- Has support from school faculty and staff
- Has support from alumni members



CHSAA - SWOT ANALYSIS

Strengths

- Alumni database is organized and updated
- Established bank account
- Annual alumni banquet
- Support and interest from individuals involved with the school and in the community
- School has solid reputation both academically and athletically
- School has established logo



CHSAA - SWOT ANALYSIS

Weaknesses

- No organizational direction
- CHSAA does not have 501(c)(3) status
- Limited communication between CHSAA and members
- Minimal budget and/or consistent pool of funds
- Logo sometimes used inconsistently



CHSAA - SWOT Analysis

Opportunities

- Potential partnerships with local groups
- Alumni 101 added to school curriculum
- Use of technology as cost-effective method of communication
- Potential availability of alumni members to donate areas of expertise / volunteer time



CHSAA - SWOT Analysis

Threats

- Time needed to establish CHSAA as 501(c)(3)
- Current state of economy
- Fundraising efforts of other local groups/charitable causes
- Consolidation of schools
- Limit on where state and federal funding can be spent
- Rising costs of education



Core Problem / Opportunity

- If CHSAA does not attain 501(c)(3) status, legitimate communication and marketing efforts cannot be implemented and the goal of becoming a consistent, stable financial resource to Centralia Schools



KEY PUBLICS – CHS Faculty and Staff

- Concerned with academic success and well-being of students; image of school and community
- \$40 - \$1500 spent out-of-pocket to accomplish classroom goals
- 71% CHS Faculty and Staff provided positive feedback and encouragement for endeavor
- Primary message: *“Tradition, Pride, Team Work, Future”*
- Secondary message: *Appreciation, recognition, opportunity*



KEY PUBLICS – Young Alumni

- Ages 18-34
- Group is pursuing post-secondary education or has entered workforce directly
- May not solicit for donations but should encourage participation and communication
- Communication via online technology
- Views CHSAA as ‘old person’s group’
- Secondary message: *Stay involved, stay connected.*



KEY PUBLICS – Alumni Age 35+

- Concerned with providing for family, future and solid investments
- More potential disposable income
- Limited online communication – email best option
- Keep this group informed about CHSAA
- Secondary message: *Stay involved, stay connected*
- Secondary message: *Make Your Mark*



KEY PUBLICS – Alumni Age 65+

- Close to retirement; grandchildren as hobby
- Traditional means of communication – mailed newsletters, solicitations, etc.
- Tax advantages if donate contributions from IRA
- Build image of stability and future of education
- Secondary message: *Stay involved, stay connected*
- Secondary message: *Make Your Mark*



COMMUNICATION PLAN – RACE

Supporting Research

- Tax-exempt opportunities and benefits
- Credibility and stability of organization
- Independent control over operating procedures
- Cost-effective

Objective #1:

- Provide CHSAA Steering Committee with recommendation for option to become 501(c)(3) organization at January 2009 meeting.



Objective #1 Tactic – Execution plan

- Purpose to outline steps and recommendation for 501(c)(3) status

Key to Success

- This objective will be considered successful if the committee can select an option and have the filing process complete by May 2009.



Supporting Research

- Donor connection and belief to cause
- Emotional attachment and connection with school
- More likely to donate if organization has strong organizational structure
- Communication with school

Objective #2:

- Educate key publics about the revitalized image of CHSAA by May 2009



Objective #2 Tactic - CHSAA Introduction Letter

- Purpose is to educate key publics about newly organized CHSAA, its mission, organization, purpose and benefits.
- Implement March 15, 2009 – May 17, 2009

Keys to Success

- This objective will be considered successful if CHSAA Introduction Letters have been received by the annual banquet date in May 2009.



Supporting Research

- Opportunity to participate
- Feeling of involvement
- Recognition for participation
- Donor connection and belief to cause

Objective #3:

- Increase overall attendance at alumni banquet from 225 to 235 by May 2009

Objective #4:

- Increase attendance of young alumni from 17 to 27 by May 2009

Objective #7:

- Host a young alumni event at 2009 football game; get 25 young alumni members to attend.



Objective #3 and #4 Tactic - Email invitation

- To inform and encourage participation and attendance at CHSAA events
- Will send out April 19, 2009
 - Will run in conjunction with hard copy mailed invites
 - Will conclude May 24, 2009
 - Additional tactic of reduced admission cost
 - Sub-tactics will include radio and/or newspaper ad



Keys to Success

Objective #3

- This objective will be considered successful if the attendance at the 2009 alumni banquet draws 20 more people than the previous year's banquet.

Objective #4

- This objective will be considered successful if the attendance at the 2009 alumni banquet draws 10 more young alumni members than the previous year's banquet.



Objective #7 Tactic - Panther Tailgate Party

- To encourage participation and attendance at CHSAA events
- Party will take place week of Sept. 20, 2009 or Sept. 27, 2009
- Sub-tactics will include radio and/or newspaper story

Keys to Success

- This objective will be considered successful if the Panther Tailgate Party occurs and 25 young alumni members are in attendance to receive complimentary T-shirts and one receives a \$500 scholarship.



Supporting Research

- 38% stated it was “very important” or “somewhat important” to stay connected to CHS
- 72% interested in receiving updates from CHSAA
- 77% prefer to receive email updates
- Digital media user-friendly, cost-effective, facilitates and strengthens connectedness

Objective #5:

- Encourage 25 alumni members to register PAWS accounts by August 2009

Objective #6:

- Obtain by August 2009, 50 email addresses of alumni members who want to receive email updates via PAL



Objective #5 Tactic - PAWS

- Purpose is to encourage alumni members to stay connected with what's going on with CHSAA and the school
- Launch May 31, 2009

Keys to Success

- This objective will be considered successful if PAWS has been launched and 25 members have become registered users.



Objective #6 Tactic - PAL

- Purpose is to encourage alumni members to stay connected with what's going on with CHSAA and the school
- Launch Aug. 23, 2009; will send out one message every 3-4 weeks

Objective #6 Tactic - Panther Tracks Newsletter

- Purpose is to encourage alumni members to stay connected with what's going on with CHSAA and the school
- First issue disbursed Dec. 14, 2009

Keys to Success

- This objective will be considered successful if PAL has been launched and 50 members signed up to receive updates.



Supporting Research

- Fundraising letter most effective and efficient method for contacting donors
- 80% prefer to donate one time a year
- 89% more willing to donate if they can designate where gift is applied

Objective #8:

- Promote annual 'Make Your Mark' event to raise \$5000 by May 2010

Objective #9:

- Encourage seven (7) alumni members to sign up for Panther 3D by August 2010



Objective #8 Tactic - Donation letter and response card

- Purpose is to solicit donations in annual fundraising campaign
- Disbursement will run May 2, 2010 - July 25, 2010
- Sub-tactics will include thank you letter and recognition of gift

Keys to Success

- This objective will be considered successful if by May 2010 the Alumni Association has increased by \$5,000.



Objective #9 Tactic - Panther 3D Form

- Purpose to provide flexibility in donation options for alumni members
- Will make available beginning June 6, 2010

Keys to Success

- This objective will be considered successful if by August 2010 seven members have signed up via Panther 3D Form.



Projected Expenses

- Total projected expenses: \$4,274.65
- Total projected sponsored dollars: (\$3,034.58)
- Total Projected CHSAA Expenses: **\$1,240.07**



Conclusions & Questions