

ATOS 2015 ANNUAL MEETING COMMITTEE/OFFICER ACTIVITY REPORT FORM (2015)

Name of Activity: __ Fund Raising
(Please fill out separate form for each activity.)

Committee Chair/Officer Name: ____ Ken Double

Date of Report: __ June 29, 2015

1. Actions completed since the 2015 Mid-Year Meeting: (Please bullet actions completed.)

- Annual Drive completed; record setting donations – total \$ 32,173
- That amount represents nearly \$9000 above the average year's donations
- And approx. 90% above the previous year's donations
- Membership donations and other gifts in addition to Annual Drive totaled \$43,308.05
- All donations, including the Mertz gift of \$115k totaled \$ 190,481.05
- There were more than 300 donors.
- Factoids: 1 - \$10k; 1 - \$8k; 1 - \$2500; 1 - \$2k and 8 - \$1k donors
- There were just under 200 unrestricted donations
- There were just over 100 Restricted donations.
- We have a complete list of individual, named donors and amounts.
- There was one donor – who shall remain nameless – who finally provided a significant gift (\$2500) after five years of “work” in terms of visits, meetings, reporting on progress and cajoling. We finally found something that struck a nerve.

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

- In preparation for next year's Annual Drive, I am seeking input from the Fund Raising advisors (Nancy Burton, Dr. Karl Saunders, Dr. Marie Jureit – and others) on best method going forward for doing three things – acknowledging donors publicly, while recognizing there are those who wish to remain anonymous
- Prepare the final draft of a fund raising brochure, and determine best timing for distribution, i.e. part of Annual Drive? Distinct from Annual Drive?
- Discuss with these individuals and the board the best timing to announce a major capital campaign.

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

- Brochure complete and mailed (or sent inside the journal to save mailing) in best determined period of time
- Annual Drive letter composed and ready for mailing and distribution no later than October 10, 2015
- Add a minimum of 10 new major target donors
- To entice new donors and new excitement, generate at least two new programs/ideas for gift giving
- Create the groundwork for a major capital campaign

4. Amount budgeted for your committee: __ \$ 5200 (for 2015-16)
Amount expended by your committee: _ \$ 3690.33 (in 2014-15)

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

- This was a very good year in fund raising; seeds continue to be sown for future gift giving
- Including the Lufkin Gift of \$900,000, ATOS has generated more than \$2.4 million in gifts in 5-1/2 years.
- That total includes nearly \$140k in Annual Drive donations; nearly \$200k in Membership donations.

6. Please provide a three-bullet summary of your committee/task force/officer activities since the 2015 Mid Year Meeting. These will be included in the minutes of the annual meeting.

- ATOS fund raising was very successful in 2014-15, securing a \$115,000 gift for the Endowment Fund, and a total of more than \$190,000 in total donations, large and small
- The Annual Drive campaign recorded a record level of generosity from the ATOS membership, providing \$32,200 for ATOS programs and operations
- More than 300 members provided gifts to ATOS this year, and in 5-1/2 years of fundraising efforts, ATOS has generated more than \$2.4 million dollars in gifts.

