



## Strategic Plan 2024-2029

### Vision

The Northwestern Lehigh Educational Foundation is an independent organization that relies on funding through donations from parents, district residents, businesses, alumni and friends. These funds are used to support educational programs that might not otherwise be funded, especially those programs that are innovative and creative, and support the success of self-sustaining graduates committed to both life-long learning and our community.

### Mission

The Northwestern Lehigh Educational Foundation (NWLEF) will provide partnership opportunities to enhance learning, promote academic excellence, and encourage community involvement for the students and staff of the Northwestern Lehigh School District.

### Values

We Believe Education Changes Lives & Strengthens Communities

We Believe Education Is an Investment, Not an Expense

We Believe Students Deserve a High-quality Education

### Guiding Principles

As a Foundation, we hold true and are guided by:

- Transparency
- Community
- Good Stewardship
- Integrity
- Collaboration

### Focus Areas

#### 1. **Community Visibility, Awareness, and Engagement**

Increase the foundation's visibility across our various audiences to strengthen and expand NWLEF's identity as a highly valued community resource.

#### 2. **Fundraising and Stewardship**

Develop and execute robust giving campaigns, alongside expanded community outreach and donor stewardship, to optimize the foundation's financial growth.

#### 3. **Accessibility & Support to Schools**

In alignment with the NWLSD Portrait of a Graduate, support and elevate existing programs and understand critical investment needs for emerging experience gaps that cannot be supported through the district's budget and tax dollars.

#### **4. Operational Excellence**

Align the people, processes, and systems of NWLEF to achieve the Foundation's mission and vision.

### **Community Visibility, Awareness, and Engagement**

#### **Increase brand awareness of the Foundation**

##### **Objective Statement**

Evaluate and enhance our branding to create an aspirational brand that is easily identifiable and clearly represents our mission both internally and externally.

##### **Recommended Actions**

1. Create a brand guide including voice and messaging
2. Establish an annual marketing calendar and cadence for external communications
3. Develop a marketing report and establish baseline metrics and goals
  - a. Consider distributing an awareness survey in collaboration with the school district to survey families, as well as school staff to get baseline metrics.
  - b. Review social media metrics and spending as well as request NW press circulation and readership data.

#### **Increase Reach and Engagement**

##### **Objective Statement**

Increase reach and engagement among stakeholder audiences, including school administration and staff, alumni, active students and their families, and community members.

##### **Recommended Actions**

1. Develop multimedia content, including videos and testimonials, showcasing the tangible benefits of foundation support.
  - a. Lean into storytelling by showcasing GROW grants, donor,s and students for use during presentations, etc.
  - b. Feature testimonials from teachers and students to humanize the impact of donations.
2. Grow a high-quality email contact list to distribute quarterly E-newsletters, event announcements, and more.
  - a. Develop email templates for newsletters, event announcements, and solicitations
  - b. Engage in intentional activities to grow the email list
3. Increase social media presence and engagement
  - a. Identify board member(s) responsible for social media presence and develop/provide training as needed.
  - b. Define social strategy and content pillars

- c. Increase the buy in and support from the school staff through a back-to-school social media campaign and giveaway.
  - d. Develop a social media liaison for each committee to support social media through the marketing committee via a form
- 4. Expand the marketing budget to invest in a more diverse channel mix to reach each of our primary audiences.
  - a. Research and explore the cost and effectiveness of billboard advertising local to the school district and/or our stakeholders' commuting routes (i.e. 78/22 corridor).
  - b. Collaborate with the school district on the co-branding of a bus for use during away sports games.
  - c. Continue investment with Penn Sports Radio and maintain brand presence at community/school facilities, including recreation fields and Tiger Stadium.
- 5. Engage with target audiences through hosted fundraising events, school and community event participation.
  - a. Gauge the effectiveness of past events and the wisdom of staging such events again.
    - i. If an event was too time-consuming and/or insufficiently profitable, redesign or replace it. Run each event in a way that encourages and inspires participants to “join our family” as donors and/or volunteers.
    - ii. Coordinate the timing of fundraising events with other organizations in the area to ensure our events will occur when volunteers, audiences, and publicity are readily available.
  - b. Utilize targeted groups such as Student Ambassadors, Staff Advisors, and the Alumni Association to gain valuable insights and disseminate messaging to key audiences.
  - c. Support community awareness programs like Night in the Country and the Community Tree Lighting.
  - d. Continue to grow and expand the Tiger Takeover events.
- 6. Develop materials to support board members and the Development Director in community engagements.

## **Student Awards**

### **Objective Statement**

Positively impact Northwestern Lehigh students’ success by supporting their goals post graduation from Northwestern Lehigh by providing student award(s) annually.

### **Recommended Actions**

1. Research and Review

Schedule a meeting with the school administration and guidance counselors to discuss the current scholarships/awards, including the application process, promotion, and the ceremony.

2. Award Application Process

Develop an award application process in collaboration with the guidance counselors, including the award amount and criteria.

3. Award Solicitation

Develop a solicitation process to secure annual funding for the NWLEF award.

4. Award Event

Request to attend the current event held by the high school to understand how it works and what opportunities it offers for us. Identify who from the Foundation would present our award.

### **Measures of Success - Community Visibility, Awareness, and Engagement**

1. Increase social media following by 15% over five years.
2. Increase website traffic by 10% over five years.
3. 100% board cumulative attendance at designated community events.
4. Award the first student award within the next five years.

## **Fundraising and Stewardship**

### **Sustain and Grow Donations**

#### **Objective Statement**

Develop a comprehensive fundraising plan for identifying, cultivating, and soliciting new donors and prospects, including individuals, corporations, and/or foundations, through visits and other forms of direct personal contact to consistently increase funding to NWLEF.

#### **Recommended Actions**

1. Develop a strategy to identify and reach new donors.
  - a. Segment existing databases
    - i. Senior Sign purchases
    - ii. Event attendees
    - iii. School Vendor list
    - iv. Prior fundraising events (i.e. raffles)
2. Evaluate opportunities to purchase and acquire Charity Donor Contact Lists that include the names and contact info of people who have donated to a charitable nonprofit in the past 12 months.
3. Develop a fiscal year calendar to support initiatives and giving campaigns, increasing the frequency and diversity of touchpoints, including direct mail, social media, email, and in-person interactions:
  - a. Utilize data analytics to identify optimal timing and messaging strategies for giving campaigns.

- b. Emphasize success stories and impact achieved through previous donations to inspire giving.
  - c. Leverage Bloomerang email capabilities to reach a wider audience with personalized, targeted communication.
  - d. Consistently communicate the diverse ways to give, including one-time and recurring donations, matched giving, etc.
  - e. Utilize transaction data to refine engagement strategies and optimize conversion rates.
4. Participate in opportunities to connect with business and donors frequently.
    - a. Lehigh Valley Chamber of Commerce
    - b. Nonprofit & Business Partners Council
  5. Explore additional ways to engage alumni (beyond reunions) in collaboration with the Alumni Association.
    - a. Alumni-focused events
    - b. Alumni giving campaigns
    - c. Consider incentivizing with reduced admission fees for alumni businesses
    - d. Add special recognition to NWLEF-hosted events
  6. Host low-lift opportunities to engage with target audiences.
    - a. Annual networking/educational event bringing target audiences together.
    - b. Utilize high-profile donors to raise awareness through jointly hosting potential donor breakfast/luncheons and/or accompanying the Development Director to meetings.

## **Cultivate and Nurture Donor Relationships**

### **Objective Statement**

Develop and execute stewardship initiatives to “wow” our donors and secure their satisfaction for continued growth in giving to NWLEF.

### **Recommended Actions**

1. Develop a comprehensive stewardship plan that addresses the complete cultivation cycle: identification, qualification, cultivation, solicitation, and stewardship to increase donor retention.
2. Create a matrix of baseline stewardship delivery for each type of gift, each giving level, and each type of volunteer activity – what happens three months, six months after the thank you, and again at the end of the year?
  - a. What impact videos, written reports, notes, letters, pictures, podcasts, visits, experiences, or events will each receive and when
  - b. Complete this task by (date)
  - c. Create a calendar so that all internal stakeholders know exactly when each of these baseline stewardship initiatives will take place by (date)
  - d. Measure the effectiveness of these initiatives, which resulted in the greatest increase in giving or deeper engagement. Base your measures on your goals.

3. Plan and implement stewardship events and mission experiences that connect the most important donors directly to recipients and other donors and that send clear Think, Feel, Do messages
  - a. Include follow-up for those who do not attend or participate.
  - b. Include virtual and online events and experiences.
  - c. Measure the effectiveness of these initiatives by the greatest increase in giving or deeper engagement. Base your measures on your goals.
  - d. Consider engaging the board and potentially teachers and staff in activities to thank donors.
4. Implement strategies to encourage recurring donations through online platforms.
5. Research and create a planned giving campaign/program

### **Measures of Success - Fundraising and Stewardship**

1. Increase in attendance at foundation events, particularly alumni-focused gatherings.
2. Growth in the number of new donors and recurring donations.
3. Enhancement of engagement metrics on digital platforms, measured through Bloomerang analytics and social media insights.
4. Overall increase in fundraising revenue, as tracked through fiscal reports and Bloomerang data.
5. Individual donor dollars increased 3-5% each year
6. Double the Employee giving campaign participation over the next five years.

## **Accessibility & Support to Schools**

### **Donations and Financial Support to School District**

#### **Objective Statement**

Increase the proportional % of funds raised that is donated back to the school district.

#### **Recommended Actions**

1. Work with the treasurer/finance committee to review the unrestricted allowance that is established each year.
2. Dip into reserves as needed to reach the threshold.
3. Ensure that EITC spending is 90% of funds raised.
4. Meet with the school administration at a minimum once per year to discuss funding needs.
5. Attend the Teacher In-Service day at the beginning of the year to kick off GROW Grants.

### **Maximize EITC Funding**

#### **Objective Statement**

Develop EITC educational materials to support increasing the number of EITC business contributors.

## Recommended Actions

1. Redevelop EITC information packet for utilization with new prospective businesses.
2. Update the website with the information packet.
3. Utilize high-profile donors to develop video or written testimonials and stories.
4. Engage with New Tripoli Bank to accompany the Development Director on potential supporter meetings.
5. Ask for business referrals from current EITC donors.
6. Research other nonprofit websites and Annual Reports for their EITC contributors and use them as a prospect list.
7. Review the published EITC list of qualified businesses for leads.

## Teacher Mini-Grants

### Objective Statement

Increase the number of Teacher Mini-Grant Applications.

### Recommended Actions

1. Rebrand Teacher Mini-Grants to GROW Grants (Giving Recognition for Outstanding Work)
  - Create a unique logo and sub-brand
  - Update all process documents and forms
2. Revisit timeline with the current Staff Advisory Committee.
3. Evaluate and discuss high-demand requests with the district and ensure those are noted on the application for ease of completion (i.e. flexible seating).
4. Improve communications
  - Create and disseminate postcards to all staff at the beginning of each school year.
  - Coordinate email promotion with Staff Advisors and establish regular email cadence.
  - Develop and share an idea bank with staff
  - Engage with building principals to promote GROW and provide acknowledgement to recipients
  - Share GROW Grants at the Back to School In-Service presentation as a kick-off.
5. Recognize GROW recipients annually in the Annual Report, at our donor event, and as part of the Back to School In Service presentation.
  - Create posters and decals for GROW recipients to display.
  - Develop an email signature image for GROW recipients.

## Measures of Success - Accessibility & Support to Schools

1. Increase funding to the school district from 60% to 75% over the next five years.
2. Increase EITC supporters from 6 to 15 in the next five years.
3. Increase GROW applications, achieving 25 submissions annually.

4. Submit two new projects per year to the state for approval.

## Operational Excellence

### Recruit, Support and Retain a Full Board

#### Objective Statement

Recruit, support and retain a staff and board that meets the strategic needs of the Foundation and works to minimize burnout and attrition.

#### Recommended Actions

1. Develop a board engagement plan to address recruitment and onboarding, engagement, giving and retention to maintain an active, engaged, and full board of 15 (fifteen).
  - a. Survey board members annually to understand and quantify succession plans and burnout
2. Identify a short list of target skills, specialties, connections, etc that the Foundation would benefit from adding to the board member composition.
3. Encourage participation in free training from Bloomerang and other sources related to non-profit work, leadership, education, and more.
4. Consider investing in professional development through educational memberships, training, and events to address knowledge gaps.
5. Evaluate and review committee and chair roles.
6. Develop and provide new board member orientation, including a board mentor for the first year.
7. Develop and distribute a Fast Fact sheet annually with key information about the Foundation and the school district.
8. Develop a succession plan to help maintain a full board and executive team.

### Boost Board Engagement

#### Objective Statement

Prioritize and develop a forward-thinking and collaborative team that feels motivated and assists in developing innovative plans to fulfill our mission.

#### Recommended Actions

1. Add Strategic Plan assessment to every board meeting agenda with goal assessment reviewed quarterly.
2. Annual board member and Development Director one-on-ones to discuss the fundraising plan and share insights and ways to support the strategy.
3. Develop a board-giving and fundraising strategy for the next five years that helps board members feel committed and engaged with the Foundation's fundraising goals.
4. The Development Director will share Development Director News via email with board members at a regular cadence.
  - a. Recent Accomplishments
  - b. Current Priorities

- c. Current Needs/Board Assistance
- d. Bloomerang Goal Update
- e. Prospects we are looking to be introduced to

### **Maximize Operational Effectiveness Through Systems**

#### **Objective Statement**

Maximize fundraising and operational effectiveness through technology, tools, systems, and processes.

#### **Recommended Actions**

1. Evaluate and enhance the current tech stack, including but not exclusive to Bloomerang, Kindful, and the Google Suite of products (email, calendar, docs, sheets, etc.).
2. Research and implement a finance tool to simplify financial reporting.

#### **Measures of Success - Operational Excellence**

1. 100% of board members make a financial contribution to the NWLEF each year, outside of event registration.
2. The majority of board members rate the following questions on the annual board member survey as a 3 or above:
  - a. Rate your satisfaction with the NWLEF
  - b. How likely are you to recommend joining the NWLEF
3. 75% of board members enroll in monthly giving within the next five years