



Moves Management Plan

Donor Information:

Name: Scott & Sally Scartosh

DEW SCORE: 24

Financial Capacity: 8

Cultivable Interest: 7

Philanthropic Disposition: 9

Background:

Scott's background is in sales where he was an ultra-high performer. Spent career earning six and seven figures annually. They retired to Florida where they have a home in an affluent community. They're members of a local club and we typically have dinner at the club whenever we go to meet with Scott and Sally. Home is valued at approximately \$3.5 Million. They attend two of our annual events that donors are invited to attend, so between these two events, and two visits to their home a year, we are able to see them with a high degree of frequency. They had given 2 gifts of \$500 before a development officer met with them in 2015 while visiting donors in Florida. After that visit the donor upgraded to \$1,000. In 2017 they attended their first event and at that time they gave \$10,000.

Giving History:

2013: First gift of \$500

2014: \$500

2015: \$1,000

2016: \$1,000

2017: \$10,000

2018: \$25,000

2019: \$25,000

Plan Logistics

Key Answers to past strategic questions:

1. They have told us that of all the organizations they support that we are on par with The Humanitarian Foundation and they have told us they are giving The Humanitarian Foundation \$100,000 a year.
2. They don't like giving to buildings or endowment. They like giving to people and meeting the people who they are helping.
3. When asked what gift in the past had meant the most to them, Scott and Sally both talked about a relatively small gift they'd given to help start a mentoring program with The Humanitarian Foundation and how one of the graduates of that program is now the director.

Natural Partners and Primary Players

1. Scott is a graduate of the religion department and maintains relationships with current and retired faculty. He's particularly close to retired professor Brian Kiggins and occasionally stays at Brian's home when he is visiting campus. Brian has the most influence and would be the primary player.
2. Scott and Bonnie are close with the Vice President for Student Development, Todd Ross, and his wife Julie. Todd and Julie are natural partners.

Short-Term Goal:

\$100,000 Gift

Long-Term Potential:

Has potential to give multiple million dollar gifts in their lifetime and estate plans.

Short-Term Moves Management Plan:

We are close to being ready to ask and believe the appropriate amount is \$100,000.

Cause: Woodsford College, investing in the future of Western Civilization by giving today's students an understanding of the liberal arts

Project: Mentoring Program within the religion department

Amount: \$100,000

Timing: Scott and Sally's next visit to campus for Homecoming a few months away

Intermediate moves:

1. Letter from religion department chair, Dr. Smithers. Scott and Sally have a good relationship with Smithers and the letter will be well received. Smithers will say how much he looks forward to seeing the Scartosh's thank them for their past support, and tease the new mentoring program in his letter.
2. Letter from President. "Look forward to having you on campus. We'd love to host you at our home but know we can't compete with the late night fireside talks Brian Kiggins offers at his house! I've been talking with the folks at the Religion Department and everyone is really excited to share this new thing they've been working on.
3. Moves Manager contacts Scartosh's to work with them on their schedule to put together a lunch with some Religion Department students while they are on campus for Homecoming.
4. Call from Brian Kiggins to confirm Scartosh's are staying at his home, when they plan to arrive and depart, and other plans they have while in the area.

Long-Term Moves Management Plan:

The Scartosh's have the potential to launch a robust campus wide mentoring program, department by department, connecting professors, alumni, current students. This would require additional gifts in the six to seven figure range as we expand the program. 2020 Goal: \$100,000 gift to launch mentoring program within Religion Department. Ask Scott to serve on an advisory committee overseeing the mentor program with the Religion Department.

Next 1-3 years: Intermediate gifts, annual and sustaining gifts to continue investment within existing program. Move toward annual gift of \$100,000. Within this time period we should also discuss Scott and Sally including the college in their estate plans. Continue to encourage grandkids to attend Woodfords.

Next-2-4 years: An additional larger gift \$100,000-\$250,000 (separate from sustaining support of existing programs) to expand mentoring program to additional departments. Sally could potentially serve on an advisory committee overseeing the expansion of the mentorship program. By this point and with this level of investment, Scott and Sally are potential board members and this should be explored with them during this time period.

5+ years: Multi-million dollar investment to expand mentoring across college. Intermediate asks should work to reinforce and build on buy-in within this area.