

# Annual Fundraising Plan

Fundraising Plan				
YEAR GOALS				
Impact Goal	Provide 300,000 hours of safe, educational, and healthy after school and summer programs to local children to help them succeed in school and a home.			
Overall Fundraising Goals				
Operating	\$	5,800,000	Capital	\$ 200,000
Annual KPI Targets				
Donor retention	60%	Number of corporate sponsors	6	
Donor growth rate	10%	Board member participation	100%	
Matching gift rate	3%			
Average gift size	\$110			
Number of major donors	50			
Implementation of Objectives				
Objective		Purchase new CRM software		
Month	Method	Activity	Responsible	Date
Jan	Research	Provide short list of potential software to ED	Wong and Eli	1/31/2023
Feb	Interview	Set up demos to test software	Wong and Eli	2/28/2023
Mar	Present	Present short list of top 3 candidates and evaluate	Wong and Eli	3/31/2023
May	Convert	Begin cleaning data to prepare for conversion	Wong and Eli	5/31/2023
Jun	Convert	Turn over data for conversion and begin training	Eli	6/30/2023
Objective		Moves mangement program		
Month	Method	Activity	Responsible	Date
Feb	Research	Investigate different types of mm processes	Mendez	2/23/2023
Mar	Research	Ensure desired process works with new CRM	Wong & Mendez	3/31/2023
Jul	Implement	Begin new mm process and identify top candidates	Wong & Mendez	7/8/2023
Aug	Implement	Develop cultivation program for top donors	Mendez	8/24/2023
Objective		Apply for new grants		
Month	Method	Activity	Responsible	Date
Mar	Research	Identify potential grant sources for busing	Washington	3/15/2023
Apr	Implement	Develop schedule for applications	Washington	4/25/2023
Jul	Implement	Apply schedule and grants to new CRM	Washington	7/26/2023
Sep	Implement	Report on grant status at board meeting	Washington	9/7/2023

# Annual Fundraising Plan

Revenue Sources						
Operating						
Source	Constituents	Current Revenue	Percent	New Revenue	New Percent	Delta
Annual Gifts	Individuals	\$ 360,000	7%	\$ 510,000	9%	42%
Special Appeals	Individuals	\$ 20,000	0%	\$ 80,000	1%	300%
Major Gifts	Individuals	\$ 800,000	15%	\$ 1,000,000	17%	25%
Online Giving	Individuals	\$ 20,000	0%	\$ 30,000	1%	50%
P2P Campaigns	Individuals	\$ -	0%	\$ 10,000	0%	New
Membership Dues	Individuals	\$ 15,000	0%	\$ 15,000	0%	0%
Planned Giving	Individuals	\$ 25,000	0%	\$ 25,000	0%	0%
Corporate Sponsorship	Corporate	\$ 30,000	1%	\$ 200,000	3%	567%
Event Sponsorships	Corporate	\$ 100,000	2%	\$ 200,000	3%	100%
Event Sales	Individuals	\$ 100,000	2%	\$ 200,000	3%	100%
Grants	Foundations	\$ 4,000,000	73%	\$ 3,500,000	60%	-13%
Service Fees	Clients	\$ 30,000	1%	\$ 30,000	1%	0%
Other	Other	\$ -	0%	\$ -	0%	0%
	<b>TOTAL</b>	<b>\$ 5,500,000</b>	<b>100%</b>	<b>\$ 5,800,000</b>	<b>100%</b>	
Capital						
Project Name				Project Budget	Amount Raised	Amount Needed
Picnic and Outdoor Pavillion				\$ 750,000	\$ 200,000	\$ 550,000
Funding Source		Projected Amount		Target Date		
Home Depot		\$ 30,000		6/6/2023		
84 Lumber		\$ 10,000		8/14/2023		
McMichaels		\$ 15,000		8/14/2023		
Jensen		\$ 25,000		8/14/2023		
		\$ -				
Project Name				Project Budget	Amount Raised	Amount Needed
Renovate South Hampton Building				\$ 200,000	\$ 40,000	\$ 160,000
Funding Source		Projected Amount		Target Date		
French		\$ 5,000		7/15/2023		
Smith		\$ 5,000		7/15/2023		
Johnson & Co		\$ 10,000		12/31/2023		
		\$ -				
		\$ -				

# Annual Fundraising Plan

Action Plan						
Annual Gifts						
Month	Method	Activity		Responsible	Date	
Sep	Email	Send 1st appeal for annual gift		Washington	9/10/2023	
Oct	Email	Send 2nd appeal to those who haven't given yet		Washington	10/10/2023	
Nov	Mail	Send 3rd appeal those who haven't given yet		Washington	11/10/2023	
Nov	Phone	Call repeat donors who have not contributed yet		Wong	11/30/2023	
Dec	Email	Send 4th appeal to those who haven't given yet		Washington	12/5/2023	
Dec	Email	Send 5th appeal to those who haven't given yet		Washington	12/29/2023	
Special Appeals						
Number Sent		5000	Target Response Rate	10%	Average Gift	\$50
Month	Method	Activity		Responsible	Date	
Feb	Mail	Send appeal to lapsed donors		Washington	2/10/2023	
Mar	Email	Send follow up email to lapsed donors		Washington	3/31/2023	
Online Giving						
# of Campaigns		4	Impressions	100000	Average Gift	\$15
Clicks		400	Cost per Click	\$0.30		
Month	Method	Activity		Responsible	Date	
Feb	Social	Run Facebook campaign for summer camp		Peters	2/2/2023	
May	Social	Run Facebook campaign for vaccination clinic		Peters	5/29/2023	
Aug	Social	Run Facebook campaign for Back to School promo		Peters	8/1/2023	
Nov	Social	Giving Tuesday campaign Facebook, LinkedIn, TikTok		Peters	11/4/2023	
Dec	Social	Year End campaign Facebook, LinkedIn, TikTok		Peters	12/15/2023	
Peer to Peer Campaigns						
Number of Teams		20	Number of Fundraisers	100	Average Gift	\$20
Number of Donors		500	Target	\$10,000		
Month	Method	Activity		Responsible	Date	
Jan	Invite	Identify 20 team leaders		Jefferson	1/25/2023	
Feb	Plan	Team leader to training & planning		Jefferson	2/26/2023	
Mar	Launch	Launch campaign for summer camp		Jefferson & Peters	3/22/2023	
May	Wrap	Complete campaign		Jefferson & Peters	5/4/2023	

# Annual Fundraising Plan

Planned Giving					
Number of Committed Planned Gifts		10	Asks		20
			Response Rate		50%
Month	Method	Activity		Responsible	Date
Apr	Research	Develop plan for launching new legacy society		Wong	4/17/2023
Jun	Present	Present options to Board for new legacy society		Wong	6/9/2023
Jul	Design	Design new legacy brochures and web page		Wong & Peters	7/31/2023
Aug	Mail	Send invitation for legacy society launch		Eli	8/30/2023
Oct	Implement	Host legacy society launch party at Harbor Bay		Board	10/12/2023
Memberships					
Total # Members		600	New Members		50
			Renewal Rate		75%
Month	Method	Activity		Responsible	Date
Jan	Email	Send member renewal reminders		Kali	1/15/2023
Feb	Mail	Send member renewal reminders to lapsed		Kali	2/23/2023
Mar	Research	Identify potential new members		Kali	3/15/2023
Apr	Mail	Send invitations for new memberships		Kali	4/29/2023
Corporate Sponsorships					
Total # Sponsors		6	New Sponsors		3
			Renewal Rate		100%
Month	Method	Activity		Responsible	Date
May	Research	Identify sponsor prospect list		Wong	5/2/2023
Jun	Present	Present sponsor prospect list to board		Wong	6/9/2023
Jun	Implement	Board assigns liaison for sponsor prospects		Board	6/9/2023
Aug	Implement	Board visits sponsor prospects		Board	8/14/2023
Sep	Implement	Board provide onsite tours for sponsor prospects		Board	9/19/2023
Corporate Sponsors					
Company Name	Target Ask	Responsible		Project	Target Date
Peters Hardware	\$ 1,000	Board		General Operating	8/14/2023
Samsons	\$ 2,500	Franklin		General Operating	8/16/2023
TFG Manufacturing	\$ 5,000	Board		General Operating	8/14/2023
Galaxy	\$ 1,000	Jimenez		General Operating	8/22/2023
Juris & Sons	\$ 1,000	Board		Summer Camp	9/1/2023
Valley Hospital	\$ 5,000	Board		Healthcare	9/6/2023
Sherman Oaks	\$ 5,000	Ali		Healthcare	8/14/2023
Piper Aviation	\$ 5,000	Board		Summer Camp	8/16/2023
All County Chamber	\$ 1,000	Board		Summer Camp	8/22/2023
Casey Health Center	\$ 5,000	Board		Healthcare	9/1/2023
Cornerstone Books	\$ 1,000	Franklin		Winter Camp	9/5/2023
Jefferson Tire	\$ 1,000	Board		Winter Camp	9/6/2023

# Annual Fundraising Plan

Grants					
Month	Method	Activity	Responsible	Date	
Mar	Research	Identify grant prospects	Washington	3/7/2023	
Jul	Apply	Begin applying for grants	Washington	7/22/2023	
Aug	Data	Enter data and status in new CRM	Washington	8/13/2023	
Grant Applications					
Foundation	Project		Ask	Due Date	
Community Foundation	Afterschool bus		\$ 20,000	9/1/2023	
Hunt Family Fnd	Afterschool bus		\$ 5,000	11/14/2023	
Johnson & Johnson	Afterschool bus		\$ 40,000	9/1/2023	
VITA Care	Afterschool bus		\$ 30,000	9/1/2023	
Able Family Fnd	Afterschool bus		\$ 5,000	9/1/2023	
REESSA	Afterschool bus		\$ 10,000	12/1/2023	
Catholic Charities	Afterschool bus		\$ 5,000	9/1/2023	
UMC Foundation	Afterschool bus		\$ 8,500	9/4/2023	
Frenchman's Cove	Afterschool bus		\$ 6,000	9/15/2023	
Impact 100	Afterschool bus		\$ 100,000	10/1/2023	
United Way	Afterschool bus		\$ 4,500	10/15/2023	
Events					
Attendees	300	Return Attendees	280	Revenue	\$300,000
Donor Conversion	80%	Sponsorships	\$100,000	Expenses	\$80,000
Month	Method	Activity	Responsible	Date	
Jan	Implement	Secure event location and place deposit	Smith	1/13/2023	
Jan	Meet	Meet with volunteer team to create event theme	Smith	1/31/2023	
Feb	Design	Design invitation and posters	Jacobs	2/28/2023	
Mar	Implement	Create event sponsorship packages	Smith	3/15/2023	
Mar	Implement	Create event invitation list	Smith	3/31/2023	
Apr	Mail	Send event invitations to sponsors & guests	Smith	4/30/2023	
July	Host	Host Evening Under the Stars	Smith	7/24/2023	

# Annual Fundraising Plan

Major Gifts					
Month	Method	Activity	Responsible	Date	
Sep	Phone	Call major donor prospects to thank for support	Mendez & Board	9/25/2023	
Nov	Meet	Set up meetings with major donor prospects	Mendez & Board	11/4/2023	
Giving Pyramid					
	Gift Amount	Number of Gifts	Sub-total		
	\$ 100,000	2	\$ 200,000		
	\$ 50,000	4	\$ 200,000		
	\$ 25,000	8	\$ 200,000		
	\$ 20,000	10	\$ 200,000		
	\$ 10,000	20	\$ 200,000		
			\$ -		
		<b>Grand Total</b>	<b>\$ 1,000,000</b>		
Major Donors					
Donor Name	Target Ask	Responsible	Project	Stage	Date
Sculthorpe	\$ 100,000	Wong & Board	General Operating	Cultivate	9/15/2023
Benjamin	\$ 100,000	Wong & Board	General Operating	Cultivate	11/4/2023
Hassid	\$ 100,000	Wong & Board	General Operating	Cultivate	11/6/2023
Folk	\$ 50,000	Wong & Board	General Operating	Qualify	11/8/2023
Freeman	\$ 50,000	Wong & Board	Healthcare	Solicit	11/12/2023
Basil	\$ 50,000	Wong & Board	Summer Camp	Qualify	11/15/2023
Perez	\$ 50,000	Wong & Board	Afterschool	Cultivate	11/16/2023
Irwin	\$ 50,000	Wong & Board	Afterschool	Cultivate	11/18/2023
Han	\$ 50,000	Wong & Board	Summer Camp	Cultivate	12/4/2023
Skinner	\$ 25,000	Wong & Board	Healthcare	Cultivate	12/6/2023
James	\$ 25,000	Wong & Board	Healthcare	Solicit	12/9/2023
Johnson	\$ 25,000	Wong & Board	Healthcare	Solicit	11/4/2023
Smithe	\$ 25,000	Wong & Board	General Operating	Identify	11/8/2023
Conrades	\$ 25,000	Wong & Board	General Operating	Qualify	11/12/2023
Fields	\$ 25,000	Wong & Board	Healthcare	Identify	11/15/2023
Kroser	\$ 25,000	Wong & Board	Summer Camp	Identify	11/16/2023
Kleinman	\$ 20,000	Wong & Board	Afterschool	Solicit	12/9/2023
Ahanmed	\$ 20,000	Wong & Board	Afterschool	Solicit	12/4/2023
Hamimoto	\$ 10,000	Wong & Board	Healthcare	Solicit	9/16/2023
Angelo	\$ 10,000	Wong & Board	Summer Camp	Solicit	10/8/2023