

2019 Fundraising Plan Progress

Board of Directors
September 19, 2019

Meghan Parsons
VP of Development & Community Engagement

3 Major Takeaways*

1. Adjust financial reporting to match Feeding America Network Activity Report (NAR) & allow for data-driven decision making
2. Create annual cases for support to secure larger multi-year gifts
3. Restructure team to allow for building of a major donor program

**FUNDRAISING
PLANNING
INSTITUTE**

OCTOBER 16-18, 2018

**God's Pantry Food Bank
Lexington, KY**



*Presented at February 28, 2019 BOD Meeting

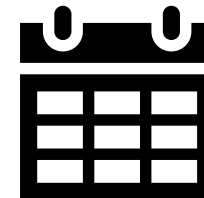
1. Adjust financial reporting

- Recording & reporting donations by Method of Solicitation

☑ DONE!

2. Cases for support

- Work groups were established for each of the four cases
- Themes & story leads for narratives emerged from meetings
 - **Advocacy & Education:** Food is a human right. Charity alone will not end hunger.
 - **Children & Families:** Children are the future of our communities.
 - **Health & Nutrition:** Focusing on quality not quantity of food to combat chronic disease and lower healthcare costs.
 - **Data & Technology:** Best ways to utilize limited resources. Data-driven decision making.
- DRAFTS of materials will be done in October
- One full case will be ready for use in 2019
- Other three will be finalized by end of Q1 2020



3. Restructure & build major donor program

- New hires

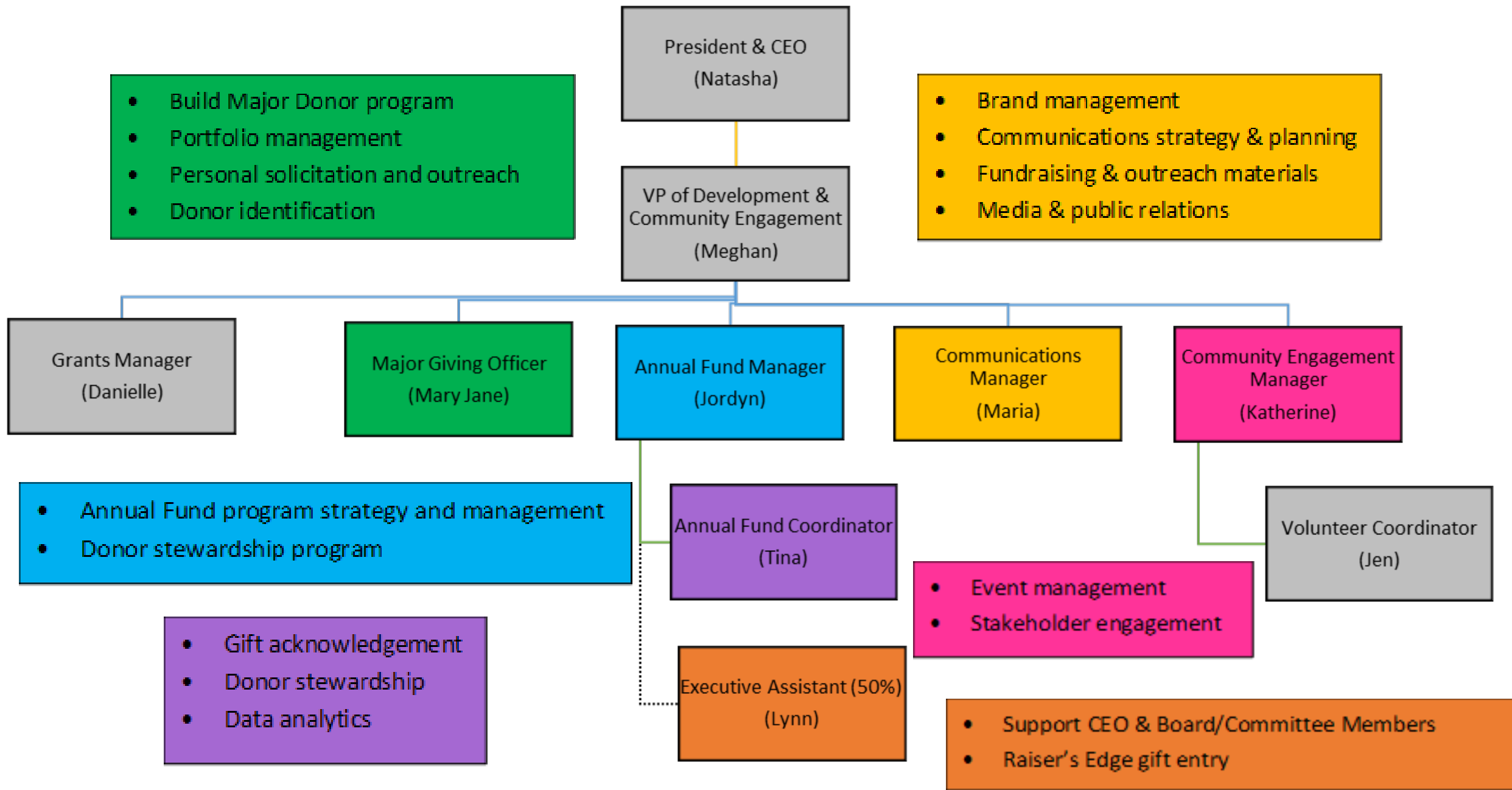
- Mary Jane Bray, **Major Giving Officer**, 8/26
- Jordyn Smith, **Annual Fund Manager**, 8/5
- Lynn Dates, **Executive Assistant**, 8/5

- Promotions

- Katherine Strawser, **Community Engagement Manager**, 5/27
- Maria Strinni, **Communications Manager**, 5/27
- Tina Culligan, **Annual Fund Coordinator**, 5/27 & out on medical 8/16

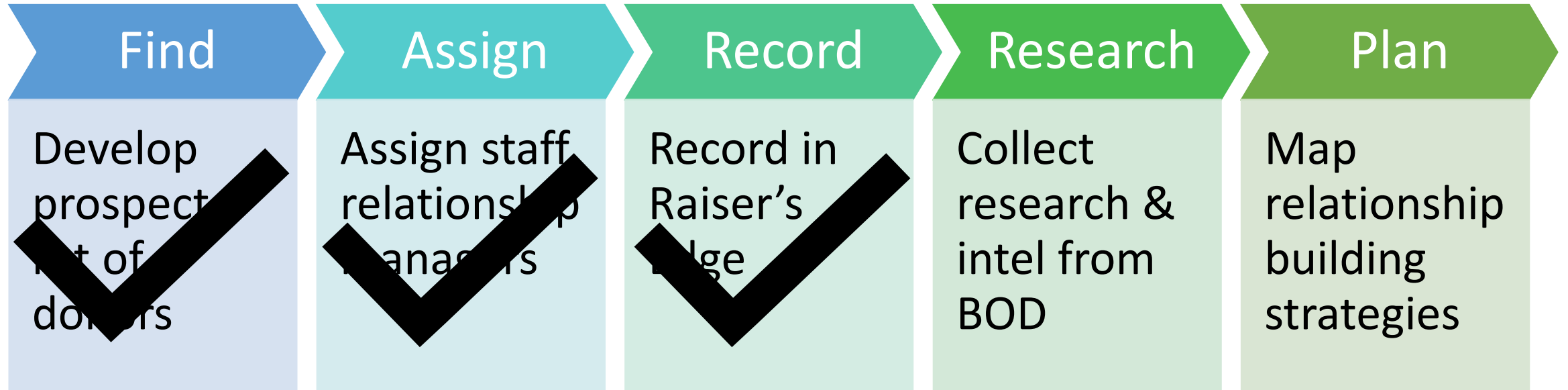
- Resignation

- Krista Matia, 8/16





Major Donor Program Building Steps





Prospect List Developed



150 individuals, family foundations & corporations

Criteria of two groupings of donors that make up list:*

1. Giving history

- \$10K+ cumulative in any given year in past 10 yrs.

AND/OR

- \$50K gift to truck or capital campaigns

2. High wealth ratings

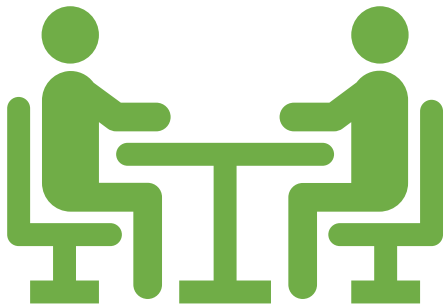
- individuals with Raiser's Edge NXT wealth ratings of \$1M+, lifetime giving of \$1K+, & recommended next ask amount of \$5K+

OR

- estimated assets of \$10M-\$25M

* additional constituents added when there is a fit

Committee & BOD Help



Meet with Meghan/Mary Jane in Q4 2019

- Provide intel on major gift prospects
- Determine your role in initial strategy steps
- Make plan for CTFH ask follow-up
- Discuss your 2019/2020 giving plans

Building Strategies



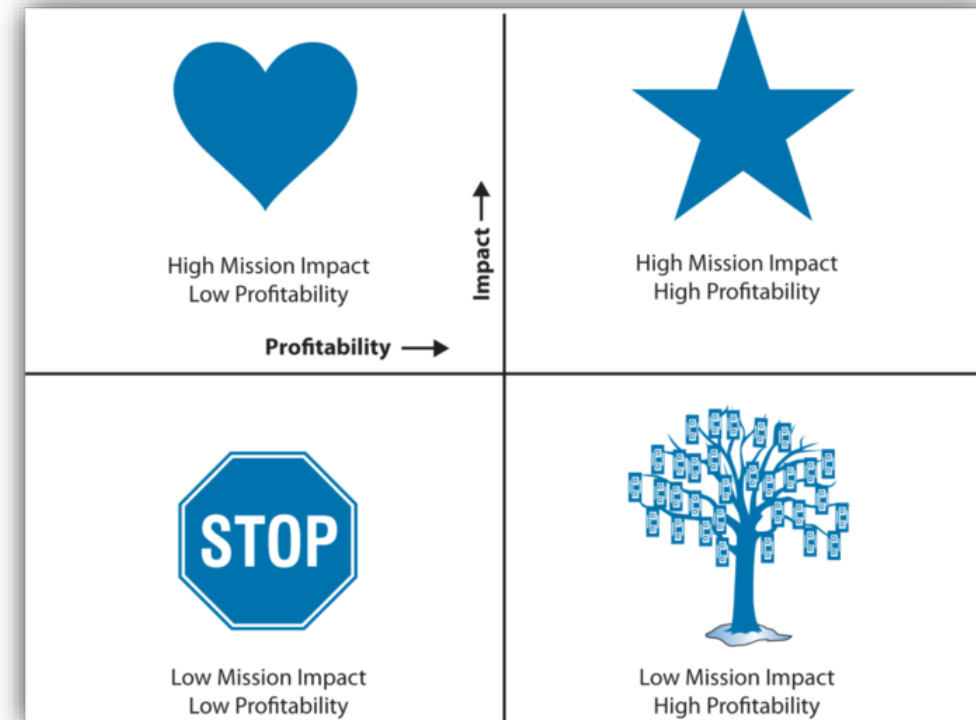
Major donor work is like dating

- Most people don't propose marriage (ask for a large gift!) on the first date
- You need to communicate, build trust and make sure your (donor/organization) values are a match – this takes time

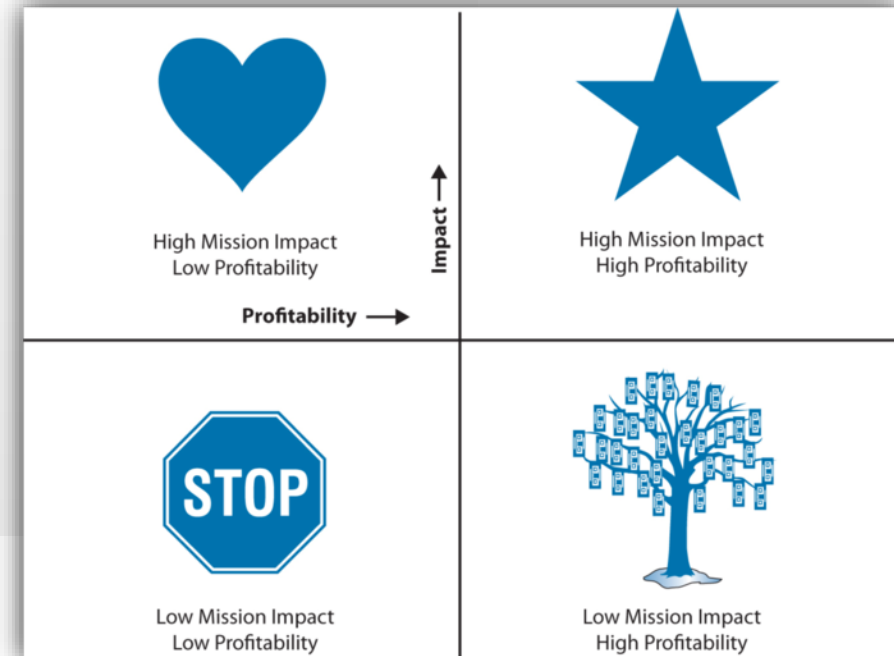
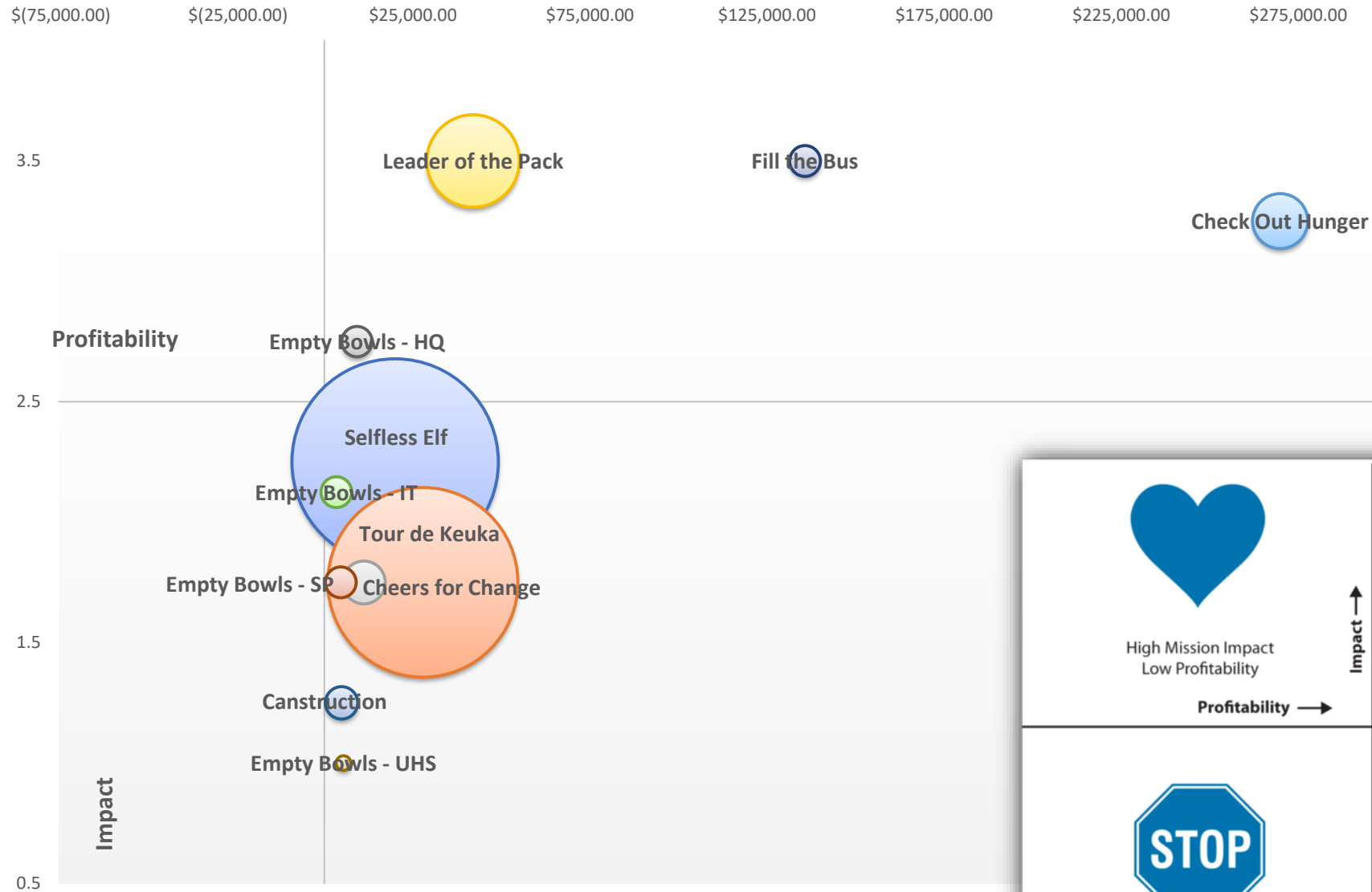
	Activity	Responsible Party
January		
February	Invite on a tour	Development Director
March	Invite to gala	Development Director
April		
May	Email with program update	Executive Director
June	Meet for coffee	Ex. Dir. /Board Member
July		
August		
September	Invite to volunteer	Development Director
October		
November	Handwritten note update	Board Member
December	Holiday card	Executive Director

Matrix Mapping Events & Campaigns

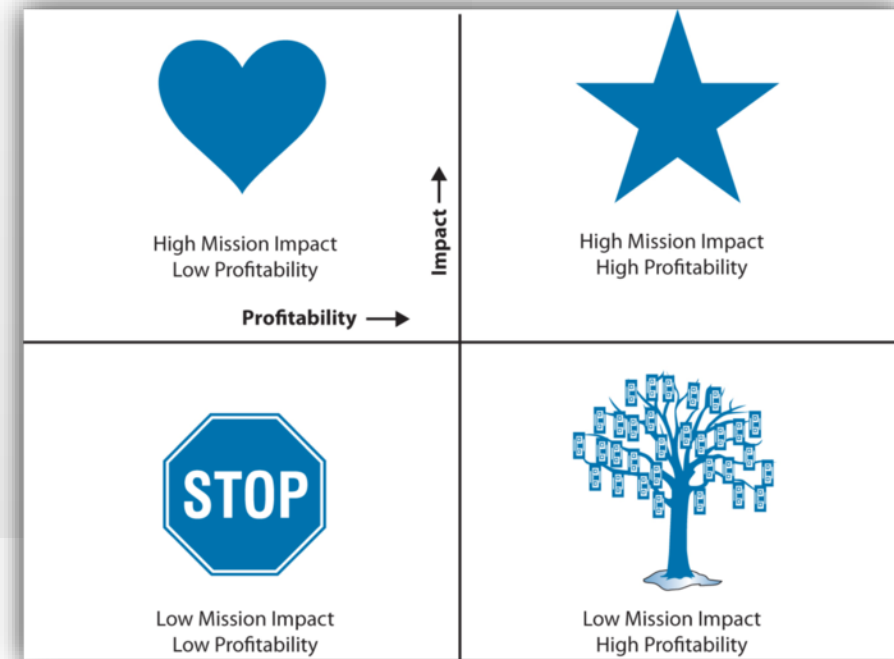
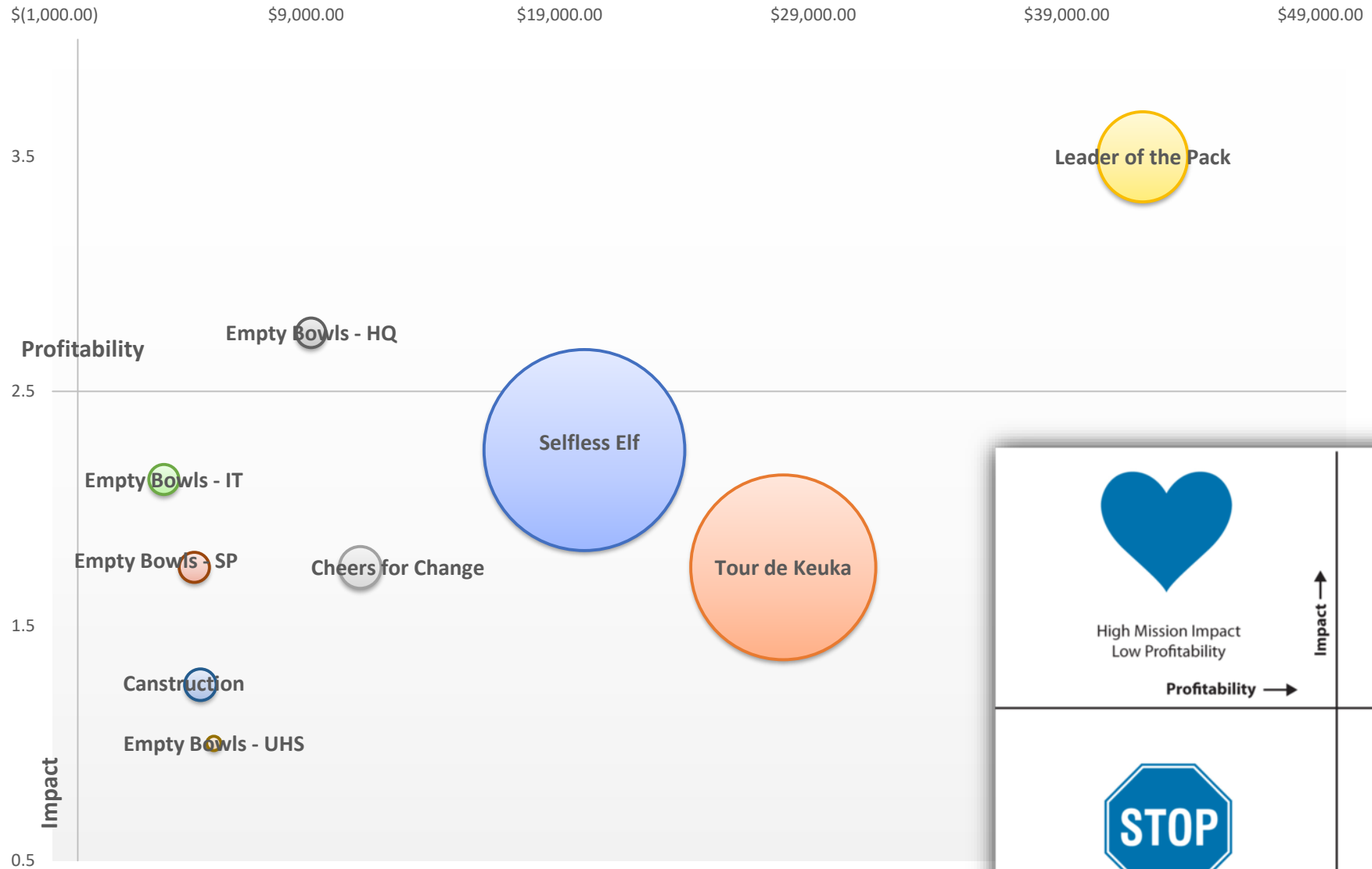
1. Identify each event/campaign
2. Determine Profitability = Revenue-Expenses
3. Determine Impact
 - Raise Money
 - Steward/Manage Relationships
 - Engagement
 - Brand Awareness
4. Map Profitability & Impact
5. Strategic imperatives based on map



Matrix Map



Matrix Map w/o Outliers of COH & FTB



Immediate Next Steps:

1. 2020 Tour de Keuka Plan by 9/25
 - SAG (Support And Gear) Support
 - Cut a ride/shorten day
 - Increase sponsorships
 - Decrease swag
 - Steering Committee – to focus on volunteer delegation to decrease staff time?
Tapping Development Committee for leadership?
2. Event Attendee Stewardship/Engagement
 - Add to Direct Mail
 - Lists for Annual Fund cultivation
 - Analyze TDK & SE attendees and volunteer giving



Questions to consider:

- How can we move events/campaigns up (impact) and to the right (profitability)?
- Why are people coming to events? What is important to donors?
- What can be sacrificed?
- What are the opportunity costs?
- How to keep donors engaged?
- Where are opportunities to delegate to volunteers/Development Committee?
- Crediting events beyond \$\$?



Team Energy – Donor Pipeline

1. Strategy, strategy, strategy!
2. Focus on return on investment
3. Introduce new donors to our work
4. Provide experiences that will keep donors engaged
5. Stay the course

