

## SAMPLE ACADEMY | THREE-YEAR ANNUAL FUND PLAN

### DEVELOPMENT REVENUE SOURCES & STRATEGIES

<u>Constituent Groups</u>	<u>Strategy/Methods</u>
Current Parents	Annual Fund, mail/email, social media, events, matching gift programs, phone, personal appeals
Grandparents	Annual Fund, mail/email, social media, events, monthly giving program, planned gifts
Business/Corp.	Annual Fund sponsorship, personal appeals, matching gift programs
Alumni	Events, Mail/email, social media, monthly giving programs
Alum. Parent	Mail/email, events, monthly giving program, personal appeals
Faculty/Staff	In-house appeals, payroll deduction
Board	Board meetings, personal appeals
Foundations	Personalized grant requests, matching gifts
Major Donors (will exist across all the above categories – see strategy explanation below)	

### EXPLANATION OF STRATEGIES

#### **Annual Fund**

Annual Fund is our school wide annual giving campaign. The goal for 2018-2019 school year is set at \$275,000.

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### **Mail/Electronic Media**

“Sample Academy” will continue to utilize both mail and digital media throughout the year as follows:

- “Sample Academy” financial aid fund- 2 per year
- Newsletter- 3 per year
- Annual report
- Christmas recognition and appreciation
- Grandparent e-newsletter- annual
- Alumni and Parent Social Media sites

### **Monthly Giving**

We will create a monthly giving program around the “Sample Academy” financial aid fund. The suggested ask amount will be \$500 per year with smaller or larger amounts welcome. This will be launched in Fall 2018. Initial focus will be on approximately 60 current or past financial aid donors. Additional promotion will be mailed.

### **Events**

“Sample Academy” will continue to host events to engage with their donors building upon past success, while creating new opportunities:

- Lunch and learn (new idea)
- Continue new property tours for campaign donors and new prospects
- Alumni events (see separate calendar)
- PTO events as needed

### **Major Donor Program**

This will include the identification, stewarding, cultivating, and soliciting of current Major Donors along with the identification of new donor prospects. This will be primarily accomplished through personal contact and follow up.

- From 6/01/15 through 5/31/18, “Sample Academy” had 36 donors who gave \$20,000 or more cumulatively. This could be considered “Tier A.”
- An additional 34 donors gave between \$10,000 and \$20,000 cumulatively over these same three years. This could be considered “Tier B.”
- An additional 55 donors gave between \$5,000 and \$10,000 over these three years and this group could be considered “Tier C.”
- These three groups (125 donors) will be the primary focus of this continued major donor program activity along with identifying new prospects. Different strategies and touch points will be developed for each tier.

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- Going forward, a Major Donor will be defined as someone giving \$5,000 or more in a single calendar year. Management tools and reports will be developed as needed. Monthly or yearly benchmarks/goals will be established.
- Sources for new major gift prospects:
  - “Sample Academy” has approximately 30 donors in addition to Tier A, B & C noted above who gave between \$3,000 and \$5,000 during the same 3-year period. These are excellent prospects for added cultivation and will be screened through Wealth Engine and rated appropriately.
  - “Sample Academy” has approximately 30 “new” donors between 6/1/17 and 5/31/18 who gave at least \$1,000. These are excellent prospects for added cultivation and will be screened through Wealth Engine and rated appropriately.
  - “Sample Academy” has 121 LYBUNT donors for the period of 6/1/17 to 5/31/18, excluding Annual Fund only donors. This means they “gave last year but not this year.” Some of these were one-time capital campaign gifts, but there may be several who were annual fund donors who lapsed. This list will be reviewed for appropriate prospects to reconnect with.

### **Business/Corporate Giving**

Primary focus is for Annual Fund sponsorships. Solicited by the committee. This includes donor recognition. Development staff will research and identify possible corporate matching gifts and work with donors to facilitate this where available.

### **Foundations**

Foundation grant proposals will be written as foundations who are likely candidates are identified.

### **Planned Giving Program**

Planned and estate giving programs will continue to be offered and promoted.

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### REVENUE GOALS BY CATEGORY

<u>Source</u>	<u>2018-19*</u>	<u>2019-20</u>	<u>2020-21</u>
Annual Fund	\$275,000	\$285,000	\$295,000
Financial aid fund	\$17,000	\$20,000	\$30,000
**Capital & Special Projects (Phase 2.0)	\$150,000	\$200,000	\$250,000
Special Needs Scholarships	\$40,000	\$50,000	\$60,000
Endowment	\$50,000	\$100,000	\$150,000
<b>TOTAL</b>	<b>\$532,000</b>	<b>\$655,000</b>	<b>\$785,000</b>

\*First year numbers are based on 2017-18 and three-year giving averages. Subsequent years are shown as projections only, to be revisited yearly. These 5 funding areas are not inclusive of all giving at "Sample Academy". Additional designated gifts come in for other areas that are not listed here since they are not under the direct purview of the development department.

It is the recommendation of The Timothy Group to bring all fundraising, including designated projects, under the direction of the development department. This reflects best practices in non-profit fundraising and is most common among Christian schools they work with. This transition will likely take one to two years to implement. The outcome will bring a more unified and strategic approach to development at "Sample Academy".

\*\*This list of Capital & Special Projects needs to be developed by the Board, Dr. Brown, and the development team. This is not designed as a Capital Campaign but will provide projects for Major Donor consideration.

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### GENERAL DEVELOPMENT REVENUE GOALS

#### 1. Increase overall giving by 10% per year

Responsibility: Chris, Alana, Annual Fund Team

Action Steps	Assignment	Timeline/Notes

#### 2. Bring in 10 new major donors per year (\$5,000 or more)

Responsibility: Chris, Alana, Dr. Brown and board members

Action Steps	Assignment	Timeline/Notes

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### 3. Secure 5 new planned gifts per year

Responsibility:

Action Steps	Assignment	Timeline/Notes

### 4. Identify and solicit 2 new foundations per year

Responsibility

Action Steps	Assignment	Timeline/Notes

### 5. Add 20 donors to the new monthly giving financial aid program per year

Responsibility

Action Steps	Assignment	Timeline/Notes

### 6. Increase Annual Fund parent participation by 5% per year

Responsibility

Action Steps	Assignment	Timeline/Notes