



Fundraising Plan 2015-2017

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Strategic Planning Committee

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I. EXECUTIVE SUMMARY

Summary of Fundraising Plan 2015-2017

JCYF Fundraising Plan was developed through an extensive planning process and analysis of various financial and marketing documents. Contained in Section II of this report, the Fundraising Plan 2015-2017 provides a broad evaluation of the organization's fundraising functions as well as suggested strategies for improving the organization's fundraising efforts, reach, effectiveness, and ultimately, JCYF's bottom-line. Though the Fundraising Plan will provide a comprehensive analysis in all areas of development, the 2015-2017 report will *concentrate extensively on increasing JCYF's individual giving* – an area that must be strengthened for long-term sustainability and growth.

II. FUNDRAISING PLAN 2015 – 2017

Summary of Findings: Current Fundraising Conditions

Corporate Sponsorships

While many nonprofit organizations have reported considerably shrinking corporate sponsorships, JCYF's corporate fundraising efforts have remained steady. The growing annual programs provided are an opportunity for local corporations and businesses to connect with a predominantly targeted population, and having a well-maintained website appears to be a draw for corporate sponsors as well to show their support.

Membership

Since 2010, JCYF's membership donor base has grown an average of 7 new donors annually. The membership base consists of those who are committed to the youth of Jennings County, and who have the opportunity to connect with JCYF's mission every year through the 3 impactful programs that are offered. JCYF is now positioned to maintain and develop deeper and more meaningful relationships with its members throughout the year.

JCYF's Obstacles

Based on the readiness assessment and organizational research, the consultants identified three areas of weakness that may alter optimal fundraising outcomes:

1. Organizations are not focusing on enhancing and promoting the services that are already offered in our community, leading to a ***duplication of services and fundraising efforts*** such as Purdue Extension, United Way, Jennings County school corporation, the library, parks and recreation departments, etc.
2. JCYF's present ***infrastructure*** lacks the ability to support comprehensive and sustained fundraising efforts.
3. JCYF is still relatively ***unknown*** in the community and its focus and purpose is not understood.

Present Infrastructure

Though fundraising activities have been fruitful in the past, it has been the result of relentless work by the President and the board. Long-term sustainability and growth in the area of fund development requires proper fundraising strategies, staff, volunteers, and equipment, such as database management software and information-sharing processes. At the time of this report, a

suitable infrastructure had not yet been developed to support a major fundraising effort.

Imbalanced Funding Scenario

While JCYF has been successful in building and maintaining ongoing relations with corporate and business sponsors, some of the organization's other fundraising efforts have failed to keep pace. JCYF's ability to acquire funding through grants has been mixed – due possibly to the current economic climate – and its ability to develop and grow a strong base for individual support is still in the organization's future. As beneficial as it is to have generous corporate and business support, the current imbalance of funding poses great risk, as any shift in corporate and business giving capacity could devastate the organization's bottom line.

Objectives and Strategy: Desired Organizational Conditions

JCYF feels that youth serving organizations need to do a better job of communicating so that people are aware of the wealth of opportunities available in Jennings County. The strategy is to focus on collaboration and raise awareness about what ***IS*** available. JCYF wants to be the catalyst to start the conversations, and encourage groups to share existing resources. Too often, organizations try to create new programs and services, when in reality it serves our community much better to utilize the resources that already exist, and find ways to supplement current programs and services where needed. Such collaboration will keep costs down, helping to provide affordable opportunities for our youth. JCYF plans to hand over its 3 annual programs within the next three years to existing youth serving organizations that have the capacity and resources to sustain and expand the programs' reach and impact. JCYF also plans to increase unrestricted funds that will be used to support youth serving organizations by supplementing and/or creating programs that meet the identified needs and interests of youth in our community as well as providing scholarship assistance for families not able to pay program participation fees. Stability is essential. The following hierarchy of objectives states the organization's fundraising goals and strategies:

Top Rank Objective (TRO)

Create new streams of revenue to increase unrestricted funds; and build up financial support of members through individual donations

Second Rank Objective

Collaborate with existing youth serving organizations to raise awareness about current programs and services to better utilize resources already available and find ways to supplement where needed.

Third Rank Objectives

Provide scholarship assistance for families not able to pay program participation fees.

According to the JCYF's 2015 strategic plan, the organization will focus on four major initiatives over the next three years; each of which is designed to support the organization's mission. The four major initiatives are to:

1.) Board Development (Members) - Recruit and engage a board of strong community leaders and membership donors. Bring training to the community to develop leaders and good volunteers, **2.) Financial** - Provide sustainable financial support by building relationships with donors, **3.) Customers** - Network with organizations that service youth to coordinate activities and resources, and **4.) Public Relations** - Raise awareness of mission so community understands the importance of the partnerships and engagement.

Keeping the JCYF's four initiatives in mind, but designed to support the initiative to increase fundraising income, the strategic planning committee has developed the following fund development goals.

Fundraising Goals and Strategy

- *Primary Fundraising Goal:* By 2016, increase net unrestricted revenue by 25% in order to support the organization's mission and TRO.
- *Secondary Fundraising Goal:* Provide sustainable financial support by building relationships with donors.

Strategies

- Ensure the fundraising plan is in congruence with JCYF strategic plan
- Actively include the board in fundraising activities
- Address internal philanthropy view: Remain 100% board participation organization
- Secure dedicated fundraising personnel (leadership and support volunteers)
- Utilize prospect identification and development techniques (*Moves Management*)
- Establish an annual fund campaign to generate unrestricted revenue
- Implement a member recognition and acknowledgement system

Financial Projections and Timeline

Summary of Financial Projections

By 2017, JCYF's fundraising net goal is projected to exceed \$25,000 per year, with 65% or more deriving from individuals, government and grant makers and 35% or less coming from corporate sources.

Summary of Timeline

Though JCYF is eager to embark on expansion of its fundraising efforts, the organization is limited to five board members and two officers, all volunteers, who divide the lion's share of work. The consultants have provided a timeline that reflects JCYF's desire to begin development of a fundraising program, but leaves some flexibility in scheduling (see Appendix A). In particular, the organization will want to structure its timeline around the completion of key action items related to research, budget, database, and volunteers (see items marked "immediate" in the timeline). It is recommended that JCYF focus on building organizational capacity over the next three years, increasing individual giving and maintaining support through grants and corporate sponsorships.

Focus Area: Individual Giving

When carefully and thoughtfully cultivated, individual donors are loyal, reliable, consistent, and generous supporters; their support will more likely help an organization weather a storm than any other single revenue source. Individual giving - comprised of membership, annual fund, major gifts, and planned giving - requires the highest degree of time and attention, but can produce the greatest rewards and ensure long-term sustainability for an organization.

Membership

For JCYF, membership is the entry point for the donor pipeline. Ideally, JCYF would begin assessing and cultivating members to become major donors through *Moves Management*. Though membership has steadily grown each year, the majority of the financial growth resulted from the acquisition of grants and corporate sponsorships.

JCYF has adopted the KPBS successful model for engaging and growing membership:

KPBS Membership Model
<ul style="list-style-type: none"> ➤ Membership benefits include freebies and special access to the website ➤ Highly-visible membership drives (shortened if \$ goal is met sooner!) ➤ Members encouragement to move up to next level through perks and appeals to support quality programming and scholarships ➤ <i>Sustaining Members</i> give to the annual ‘unrestricted’ fund monthly ➤ <i>Visionaries Club</i> is an inner circle that enjoys increased access to inside information regarding the JCYF vision, private events and increased recognition

Membership Action Steps:

- Hold 1 or 2 member-only events annually
- Design invitation-only special sessions for members at the Visionaries level (\$500) and above, and social mixers for members and their guests
- Consider adding a \$1,000 annual level

Major Gifts

Individuals willing to make major gifts will be very likely to have consistent and meaningful contact with the organization, and should begin to be cultivated over time. JCYF board and officers should define major giving for JCYF, identify and then segment prospects through the continuation of the *Moves Management* technique.

The Fundraising Committee has begun developing a list of potential major gift donors who can be cultivated through existing relationships with board members. More specifically, in order to meet the increased goal by 2017, board members and officers should identify three individuals for each membership level available. In addition, the following \$500¹ and \$1,000 members should be considered as potential major donor prospects:

Consistent \$1,000 members since 2010	Consistent \$500 members since 2010
(Names have been deleted to protect individual privacy).	(Names have been deleted to protect individual privacy).

¹ The consultants have identified \$500 as JCYF’s *de facto* level for major gifts

Major Gifts Action Item:

As an organization not yet familiar with major donor solicitation, the consultants recommend creating personal, meaningful, welcoming, and fun opportunities specifically with the goal to build relationships with potential donors. These opportunity events can be held at a board member’s home or at the pending JCYF office at Muscatatuck Park.

Planned Giving

Planned giving programs are often deemed complicated, expensive, and even superfluous by small and mid-sized organizations. It is important to note, however, that between 2010 and 2030,

over 70% of the wealth in the United States will pass from the Baby Boomer generation to subsequent generations. With approximately 8,000 people turning 60 every day in the U.S. (Misonzhnik, 2006)³ JCYF simply cannot afford to delay. The time to start thinking about Planned Giving is now, even if JCYF doesn't yet have substantial prospects for a Planned Giving program.

³ Misonzhnik, E (2006). *Retail Traffic*. "On Baby Boomer Needs: Sixtysomething."

Planned Giving Action Items:

- Invite a speaker to future a board meeting to discuss planned giving options
- Seek workshops or training for the President/ED and selected board members/officers
- Identify a board member or colleague to provide planned giving services pro bono
- Hire a planned giving professional (hourly or on retainer) if demands increases

Other Fundraising Areas: Grants Program

Efforts to expand inquiries beyond current JCYF programs will be a significant part of the fundraising plan for 2016-2017. Education and at risk youth are strong and growing grant making areas. JCYF will collaborate with existing youth serving organizations to identify needs for new and/or existing programs and services.

Action Items:

- Identify the unique aspects of programs offered by other youth serving organizations in the community and seek funding opportunities in alignment
- Expand foundation grant prospects (to include state and federal funding sources).
- Identify prospective board members with ties to targeted foundations
- Increase meaningful contact with previous and current funders: emphasize reporting success, handwritten notes, newsletters, etc.

Corporate and Business Relations

Maintain strength in this area.

Corporate Relations Action Items:

- Develop a corporate giving "wish list" in an effort to expand current prospect list (e.g. new prospect, larger amount, in-kind donation needed)
- Identify new prospective board members with ties to the corporate sector
- Design one or more community events which provide opportunity to fulfill the organization's mission, while encouraging relationships with corporations and businesses
- Expand corporate prospects to include corporate grant funding

Government Relations

JCYF has received minimal funds from local government sources, and can more actively pursue funding at the county and state levels, while being aware that overall, this sector of funding, especially locally, should be considered to be shrinking rather than growing.

Action Items:

- Identify prospective board members with ties to the public sector
- Identify existing board member relationships with county and state government leaders
- Include local government leaders in communications (newsletters, event invitations)

- and announcements)
- Continue to pursue state and national funding as opportunities arise.

Organizational Capacity

In order to meet the high organizational goals and fundraising objectives, capacity building will be an essential element to JCYF's projected expenses.

Historically, JCYF board and officers have been most successful at raising funds from corporate sources, but least successful in identifying, cultivating, and soliciting individuals for major gifts. In addition, key areas that will require additional support include membership, database management, grant writing, and volunteer coordination. As JCYF plans for growth, the organization must develop staff requirements and balance resources.

Personnel	Projected Hour/Salary or Fee	Responsibility Areas
Executive Director	20 hours/week; \$15,000-\$20,000 annually; hourly fee	Coordination of development areas
Intern/Volunteer	10-20 hours/week; volunteer or small stipend	General support for database management and development efforts, including fundraising.

Accountability and Tracking System

One of JCYF's areas of weakness is the present lack of infrastructure essential to supporting fundraising efforts. Bi-monthly meetings specifically geared toward the progress of development efforts has been implemented and adhered to. The Fundraising Committee has determined their role in this effort and will lead and address problems arising from the fundraising action items, including the stewardship of past and current donors. The full board has sign-off on the Fundraising Committee's recommendations and will review progress at every board meeting. Additionally, incentives and celebrations for achieving goals need to be established.

Conclusion and Next Steps

The Jennings County Youth Foundation finds itself on the brink of organizational growth and development. With sufficient increases in philanthropic support, JCYF has the potential to emerge as an innovator among organizations offering youth based programs to the Jennings County community. The following immediate next steps are recommended to begin the implementation of a strategic fundraising initiative.

Next Steps (Initial Steps):

- ✓ Fundraising Committee established
- ✓ Set a date for adopting the final fundraising plan and begin to calendar action steps
- ✓ Redefine needs and expectation of fundraising volunteers
- ✓ Develop and/or refine fundraising budget
- ✓ Develop Moves Management matrix to begin cultivation and solicitation of those with major gifts potential.

IV. REFERENCES

Misonzhnik, E (2006). Retail Traffic. “On baby boomer needs: sixtysomething.” Retrieved online October 22, 2010: http://retailtrafficmag.com/development/retail_sixty_something/

APPENDIX A: Fundraising Timeline

Worksheet: Fundraising Goals, Strategy, and Timeline

Strategy	Actions	When, Timeline	Who
Ensure fundraising plan is in congruence with strategic plan	Review consultant recommendations	Immediately	Full Board
	Revise, rewrite as necessary	August 2015, revisit annually (2016, 2017)	Full Board
	Approve final plan	August 2015	Full Board
Actively include the board in fundraising activities	Re-evaluate finance committee	Immediately	Create an JCYPF board matrix
	Identify and recruit board members with fundraising skills	January 2015 - ongoing	Word of mouth, Chamber of Commerce and Board referrals
	Schedule quarterly prospecting meetings with the full board	October 2015 – December 2017	Prospect lists for individuals, corporations, government and grants/foundations
Address internal view of philanthropy	Engage in board training	October 2015, revisit annually (2016, 2017)	Workshops, consultant; address culture of philanthropy
	Become a 100% board member participation organization	December 2015	Full Board
Increase organizational capacity:	Evaluate and restructure current areas to improve performance, identify weaknesses	August 2015	Consultant; create job descriptions
	Create an initial budget for Fundraising efforts	October 2015	Finance Committee
	Recruit intern or volunteer (1-2) for PT work on membership/database	October 2015	
Increase organizational capacity (infrastructure): TECHNOLOGY	Identify and install a database and/or software to manage membership	Immediately * Create a back-up of database	IT consultant/technician and/or database consultant; funds for
	Add segment JCYPF data to database/software	Immediately	IT consultant/technician and/or database consultant and/or considerable staff time

Establish an Individual Giving Program and begin building a pipeline of support	Establish an Annual Fund (e.g. <i>The JCYP Assistance Fund</i>)	October 2015	Finance Committee
	Articulate characteristics of, and activities related to, Annual Giving Program	October 2015	Finance Committee
	Consider \$500 as a benchmark for Major Gifts	October 2015	Finance Committee
	Segment Membership by membership level and in accordance with established Major Gift amount (e.g. \$500)	Spring, Summer 2016 - ongoing	Finance Committee
	Outline strategy and activities for Membership Program growth	Fall 2015	Finance Committee
	Develop Planned Giving opportunities which are appropriate for, and manageable by, JCYP	Spring – Summer 2016	Finance Committee
	Incorporate prospect research, identification and development (Moves Management) techniques into all fundraising activities	January 2016	Finance Committee
	Develop systems for celebrating successes and rewarding hard work	October 2015	Finance Committee
Expand grant program	Expand grant program to include family foundations, corporate grant opportunities with youth interests	Spring 2016 - ongoing	Finance Committee
Diversify special event funding to mitigate risk and increase revenue	Identify possible underwriters and prospects for individual donations.	Begin now for 2016 programs; one year in advance for 2017 programs	
	Identify corporate foundations and prospects (SONY, Lowes, Target, etc.)	Begin now for 2016 programs; one year in advance for 2017 programs	