



## 2017 Fundraising Plan

In its 2015 Strategic Plan, the Alliance identified the critical need to increase unrestricted funding. Currently, unrestricted funds total less than 5% of Alliance total annual income. Achieving the Alliance mission and sustaining an effective organization over the long term, will require several successful strategies for fundraising. In order to be successful, an organization must plan feasible strategies for each year, set appropriate goals, and involve both Alliance Staff and Board in implementing the action steps. Below is the Alliance's 2017 fundraising plan for raising unrestricted funds. This is a starting point and a foundation for future growth.

The Alliance has identified eight strategies in this fundraising plan, plus the need in 2017 to explore in a ninth strategy – planned giving. Each strategy has goals, action steps, timeline, and costs. The leadership and the support for each strategy is designated as either Board or staff. Responsibility will be further assigned for each strategy and for the action steps within each strategy, so that all strategies are addressed and the load is shared among members of the Board and Staff. The Board Development Committee and the Alliance Development Director will ensure that:

- actions identified are taken by those so designated,
- momentum is maintained throughout the year, and
- progress will be evaluated while making adjustments to the plan as needed.

At each Board meeting, the Board Development Committee chair, in concert with the Alliance Director of Development, will report on the progress of the plan.

Beyond these strategies, for which the Alliance has existing capacity on which to build and refine its approach, we remain open to evaluating new and innovative ideas that Board or Staff may have to add to our unrestricted fundraising plan.

### Strategies:

1. **Foundation Grants** – Most foundation grants are restricted to programmatic work. The strategy in this plan targets unrestricted support from private foundations. The plan is to search for and develop relationships with those foundations that do provide unrestricted funds especially family foundations that do not accept unsolicited proposals. The Alliance had no unrestricted grants in 2016.

**2017 Goal:**      **1-3 grants totaling \$10,000-\$30,000**

**Steps to be taken:**      Led by Director of Development; supported by Board

- a. Identify and build relationships with specific foundations
- b. Board makes intros where possible
- c. Alliance Staff submits proposals

**Timeline:** year round; deadlines vary

**Costs:** Indirect - insignificant (some travel); staff time  
Direct – little to none

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2. **Board Giving** – All current Board members shall give an annual gift at a level that is significant to him/her. This is a personal gift, separate and distinct from any corporate or matching gifts. The Board Giving pledge card identifies three types of Board gifts - personal (required of all Board members as mentioned above); corporate or matching (optional and in addition to personal); “Taste” sponsorships (optional and in addition to personal; Taste sponsorships will be counted in the Events strategy listed below). All gifts (except for the Taste) are anonymous (known only to Board Chair/Alliance leadership) unless stated otherwise by the Board member. In 2016, Board giving totaled \$12,000 not including “Taste” sponsorships.

**2017 Goals:** 100% of all Board members; total non-Taste Board giving = \$15,000

**Steps to be taken:** Led by Board Chair and Development Committee; Supported by Alliance Staff

- a. Board Chair and Development Committee Chair launch Board Giving campaign
- b. Alliance Staff develops pledge cards and tracks pledges/donations
- c. Gift acknowledgment made by Board Chair

**Timeline:** Launch in January; pledge cards due by April; payment reminders throughout the year

**Costs:** Indirect – little (Alliance Staff time)  
Direct - pledge cards

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3. **Small Dollar Donors** - Small dollar donations are those that are less than the major donor minimum of \$1000. These donations are usually received through a targeted mail, online social media, email, and/or phone solicitation. For the Alliance, most small donations are acquired through Annual Appeals.

For this plan there are two (2) appeals per year – one at mid-year (June) and one at end of year (EOY). It is important to make these mailings as personal as possible such as acknowledgement of past giving and including an inside note from Board members or Executive Director. In 2016, the Alliance acquired approximately \$16,000 from EOY and \$5,000 from mid-year solicitations including an increasing number of online donations. In 2016, 327 Member Donors donated to the Alliance (that does not include Board or Taste donations). Of those, 318 were Small Dollar Donors (less than \$1000 annually)

**2017 Goals:** 400 Small Dollar donors; \$25,000;  
Capture demographics of all small dollar donors and compile stats

**Steps to be taken:** Led by Alliance staff; supported by Board

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- a. Identify potential donors including lapsed members
- b. Design appeals, craft letters and inserts
- c. Personalize letters
- d. Track and thank donors
- e. Make phone calls and/or send personal thank you notes for donations.
- f. Evaluate value producing the mid-year appeal (how to cut the cost or utilize a different focus for the mid-year appeal)

**Timeline:** Mid-Year Appeal in June & End of Year Appeal in November

**Costs:** Indirect – staff time  
Direct – Appeal design, printing, postage, 1<sup>st</sup> class mailing, etc – approximately \$1.00  
\$1.50/piece

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- 4. Membership** - The Alliance Membership program is a vehicle for growing future small donors and expanding the Alliance’s network of support. The current membership effort focuses on renewing long-standing members and expanding our contact database through the capture of demographic information related to Alliance program participation.

For long-standing members, membership renewal letters from the ED go out twice a year in March and September. Currently, there are 130 older long-time supporters who are considered ongoing members. Growing a network of members for solicitation will involve targeting the capture of contact information for persons who participate in Alliance activities over the year including volunteers for Project Clean Stream, River Smart and River Wise Programs, the Watershed Forum, and attendees at other workshops and events. There may be a need to identify specific populations in VA, PA and MD, past members/donors, etc. In 2016, the Alliance acquired \$11,262 from 149 dues paying members.

**2017 Goals:** Expand the mailing list for members by 1000 names to rally future dues paying members or small donors  
Membership “Dues” Goal: \$15,000

**Steps to be taken:** Led by Alliance State and Program Directors –supported by Board

- a. Capture contact data for all Alliance program/event participants to grow membership
- b. Develop strategies to expand membership to younger and newer people through social media, outreach to colleges and universities, etc. (potential to become members through Project Clean Stream volunteer opportunities)
- c. Offer a Member Appreciation /donor event in each State to acknowledge member support and grow membership.
- d. Set goals for state office recruitment of new members

**Timeline:** Membership renewals in March & September; Capture Program and Events data throughout the year and expand number of “dues” paying members – consider sending renewals on membership “anniversary date”

**Costs:** Indirect – staff time

Direct – materials and letter printing, postage, 1<sup>st</sup> class mailing, etc. – less than \$1/piece

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- 5. Events** – The primary Alliance fundraising event is the *Taste of the Chesapeake*. In addition, periodic film festivals, field trips or paddle events are offered to members during the year. Other events that could be considered include more regional mini-*Taste of the Chesapeake* events, larger film festivals, a golf tournament (great potential for B4B) and an outreach/thank you event for people involved in Project Clean Stream (PCS).

All major events should have a lead and/or designated ad hoc committee defined to work with Alliance staff on planning and logistics. Events should be evaluated from the point of view of input (time and money) and output (funds raised, greater exposure, new donors, new volunteers, and cultivation of friends). Because events are very time consuming and can “suck the life” out of an organization to the detriment of other fundraising activities. At the end of each event, the Board Development Committee with Alliance Staff and Board leadership should evaluate the “success” of the event.

If events are fundraisers, a net financial goal must be determined as part of the planning process for the event. If events are “friendraisers” (held for visibility or networking), there is no immediate financial goal; however, other goals need to be clearly articulated. Many times these “friendraisers” are part of the cultivation process for future donors. State offices can be involved in local “friendraising” events that attract new donors and members.

In 2016 the *Taste* netted approx. \$93,000 from events; The *Taste* grossed \$108,000 with 63 sponsors.

**2017 Goals:** Taste to raise \$100K - \$125K net; \$146K gross  
 # of sponsors/friends = 75  
 Determine the feasibility of a future golf tournament as a fundraiser  
 Host one “friendraiser event in each State

**Steps to be taken:** Lead – Ad hoc committees (Board with Mary-Angela and volunteers);  
 Supported by staff

- a. Set a feasible event schedule for the year
- b. Establish an ad hoc committee for each event; recruit the members of the Taste committee (at least 5); Jenn will work with Mary-Angela to break the Taste into smaller bites that others can handle and take ownership.
- c. Determine the net goal for fundraisers and other goals for friendraisers
- d. Charge an ad hoc committee to explore the possibility of a future golf tournament (past-Chair Don Boucher expressed interest)
- e. Consider a special event (or a special part of the Taste to say good bye to Al and welcome to the new ED) ; use transition as fundraising opportunity

**Timeline:** Taste of the Chesapeake – September

**Costs:** Indirect - staff time

Direct - Taste 2016 expenses \$16,000; State events - \$500-\$1000 each = \$3000

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- 6. Major Gifts** - A Major Gift for the Alliance is \$1000 and higher. These gifts are acquired through a process of Identification, Cultivation, Solicitation and Thanking. The larger the gift, the longer the cultivation period. All Board members can take part in identifying, cultivating and thanking. Only a select few of Alliance Staff and Board will actually do the soliciting (asking) in an in-person setting. A team of two works best. This strategy will target all past donors of a specific level and above. In 2016, the Alliance received no more than 12 major gifts ranging from 1,000-\$10,000 each, not counting Board members and Taste sponsorships. Alliance Executive Director meets in-person with most VIPS and Honorary Directors. With AI retiring and the arrival of a new ED, this strategy may be both an opportunity and a challenge.

**2017 Goals:**                   \$25,000  
   12 in-person solicitations for the year  
   Build relationships with 3 new potential donors

**Steps to be taken:**       Board Chair; Development Committee; Supported by Board  
   Staff lead/support: Executive Director and Mary-Angela

- a. Review all donors in the ACB database to identify potential major donors
- b. Compile a list of other potential major gift donors;
- c. Determine best way to cultivate and customize the approach to these individual donors
- d. Recruit Board members to host cultivation events;
- e. Identify solicitation team for each major donor
- f. Ask donors for other potential contacts

**Timeline:** throughout the year (average one a month)

**Costs:** Indirect - staff time  
                   Direct - some travel and cultivation event expense

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- 7. Business/Corporations** – Corporate giving makes up approximately 5% of philanthropy in the US. Corporations and businesses give to further their own promotional, sustainability or social responsibility goals in the community, thus furthering their corporate mission and reputation. When a nonprofit organization can merge the corporation’s goals with their own mission, there is a great potential for partnership.

This strategy calls for a targeted approach to specific corporations, followed by in-person solicitation. Currently, the Alliance approaches this audience through Board contacts or programs such as Business for the Bay (B4B) and Project Clean Stream (PCS); both can be high visibility opportunities for businesses. This strategy will focus on a targeted approach to acquire sponsorship funds for B4B and Project Clean Stream that will free up unrestricted funds currently used to support these programs. The Alliance will also consider the READY program for future support by corporations. Currently, the Alliance raises \$100,000 in sponsorship support from corporations or business for B4B and Project Clean Stream.

**2017 Goals:** \$150,000 (includes \$50K of new money)  
10 in-person solicitations for the year including 2-4 new donating corporations

**Steps to be taken:** Led by Alliance Program Staff and Mary Angela; Supported by Board and State Directors

- a. State directors and Board members identify potential business/corporate donors
- b. Acquire contact info for employees who participate in Alliance activities through a corporate program
- c. Determine benefits to each corporation for their support of the Alliance (such as greater visibility, invitations to events, improve their environmental good will, etc.)
- d. Board members open doors to corporate leadership;
- e. Shop for a new bank that will donate to the Alliance; consider banks in other states;
- f. Answer the question “How does the gift from the corporation benefit the corporation?” and develop appropriate materials in advance of corporate outreach
- g. Provide training for state directors and Board members as needed.

**Timeline:** throughout the year

**Costs:** Indirect - staff time  
Direct - travel time, some cultivation expense

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**8. Workplace Giving** – This strategy allows government employees and employees of participating private corporations to donate on a weekly/bi-weekly basis to a charity of their choice through payroll deduction. After the paperwork is submitted by the charity and the nonprofit is accepted as a recipient of donations, there is little else to be done besides occasionally participating in hosted events where the Alliance can have an informational table. Payments come to the Alliance after a long lead time. The Alliance is currently registered as a recipient of these donations through EarthShare, MD Charity and the Combined Federal Campaign. In 2016, \$13,000 was raised through workplace giving.

**2017 Goals:** \$13,000 a year

**Steps to be taken:** Led by staff – Mary-Angela leads with Jory and other staff and volunteers; Supported by Board

- a. File necessary paperwork to continue to be a recipient of EarthShare, Combined Federal Campaign, MD Charity;
- b. Consider other workplace campaigns for acceptance such as campaigns in PA and VA state gov’t, corporate campaigns, etc;
- c. Schedule to attend campaign events throughout the year;
- d. Recruit and train a corps of volunteers to be ready to man the Alliance table when invited to attend these events; work with state directors to recruit volunteers
- e. Insert the workplace giving code in all Alliance materials and online

**Timeline:** throughout the year (primarily August through February)

**Costs:** Indirect - staff time  
Direct - travel, postage, exhibit expenses

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- 9. Planned Giving** – A planned giving program for the Alliance will cultivate donors to consider long-term gifts through a number of financial instruments. A planned gift is any major gift made, in lifetime or at death, as part of a donor’s overall financial and/or estate planning. It may include cash, appreciated securities/stock, trusts, annuities, real estate, partnership interests, personal property, life insurance, a retirement plan, etc. This strategy will be explored in 2017 with a goal to launch in 2018. It will require the services of a third-party Planned Giving expert to work with Alliance donors. These gifts are not part of the budgeted revenue for an organization, since they are difficult to project and often unknown.

**2017 Goals:** Add bequest language to all Alliance printed materials and website  
Retain a Planned Giving expert  
Plan to launch this strategy in 2018-2019

**Steps to be taken:** Led by staff – Mary-Angela; supported by Board Development Chair- Jenn

- a. Insert in Alliance materials and website a bequest phrase such as “Remember the Alliance in your will...”
- b. Compile a list of prospects for planned giving outreach including VIP list (Mary-Angela and designated Board members and state directors)
- c. Make thank you calls to older donors and long-time donors, etc. to start cultivation;
- d. Determine specs for a 3<sup>rd</sup> party expert including knowledge about conservation easements
- e. Research and select a the third-party planned giving expert; this expert must serve in two ways: as an advisor who provides info to potential donors and/or as the person who sets up the planned giving instrument for the donor; (here is info that you can take to your own financial advisor or I can do it for you); Consult with Craig Highfield re: Estate Planning for Forests workshops;
- f. Develop an informational piece brochure about planned giving and other communications to get the word out;
- g. Plan a future a planned giving information event for donors for 2018-19

**Timeline:** set a due date for each of the above steps above throughout 2017

**Cost:** Indirect – staff time  
Direct - little to none

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- 10. Other** - Future ideas and strategies to be added by the Board.

**TOTAL PROJECTED INCOME = \$220,000 to \$400,000**