

Kilkenny Children's Home

Development Plan

2009 – 2010

Background Summary

The Kilkenny Children's Home has begun an exciting new phase of growth which calls for the creation of a larger, more structured, and more entrepreneurial development organization. This development plan builds on the work that has already been completed by the board to lay out the strategy, tactics, and timelines necessary to meet the KCH's ambitious goals. In doing so, this development plan is guided by two key documents:

1. The Strategic Plan – The KCH's board-approved Strategic Plan defines the agency's ultimate goal: being able to provide the Home's core services to 100% of the population of reported abused children each year. In order to meet this goal, the Strategic Plan lays out a three year program of growth in all areas, including office space, staff, victim support services, collateral materials and marketing needs. The goals of the Home also include an expanded research agenda, and the possibility of expanded services after meeting our 100% goal. This development plan begins with the second year of the growth plan, and presents a strategy for meeting the Strategic Plan's budget needs in years 2 and 3, and into a 4th year.
2. The Development Audit – The KCH recently completed a comprehensive Development Audit utilizing the consulting services of GHRadnor LLC. This audit provided a clear and definitive overview of the Home's current fundraising capabilities and noted the potential for growth in a number of areas. The Development Audit provides a blueprint for our fundraising growth and this development plan is thoroughly informed by the audit's findings.

Types of Funding

It is important, at this point in the plan, to differentiate between the various funding streams that provide revenue for the KCH:

1. Philanthropic Fundraising – This includes all money raised from non-governmental sources for the KCH. The three primary types of philanthropic funding the KCH currently engages in includes:
 - a. Individual Giving – Money raised from individuals shall be the primary focus of the KCH's development efforts
 - b. Foundation Giving – Money raised from foundations and grant-writing comprises a significant portion of our fundraising efforts, but is not our primary focus.

- c. Events – Money raised from fundraising events will continue to be a key part of our plan.
2. Government Contracts and Funding – While it is important to include the large amount of government revenue that we receive as part of any development plan for the KCH, it is equally important to note that government funding is not the primary focus of our fundraising efforts. The primary focus of our efforts shall be raising philanthropic dollars to support the KCH’s work.

Goals and Objectives

The primary goal of this development plan is to provide the funding necessary to carry out the KCH’s growth agenda, which will allow the Home to meet the needs of 100% of Kilkenny’s homeless children. The board’s growth planning budget has set the following revenue goals for the next three years:

| | |
|----------------------|-------------|
| 7/1/2009 – 6/30/2010 | \$1,181,646 |
| 7/1/2010 – 6/30/2011 | \$1,297,879 |
| 7/1/2011 – 6/30/2012 | \$1,460,616 |

Thus, the goal of this plan is to provide a detailed strategy to raise the above budgeted revenues. In order to meet this goal, the Kilkenny Children’s Home must meet the following objectives:

- Build a development infrastructure that is capable of handling a fast-growing, dynamic fundraising operation of the size and scope laid out by this plan
- Establish scalable fundraising systems capable of providing maximum efficiency for a relatively small development staff
- Provide easy and concrete methods for cultivating and maintaining relationships with donors and prospects
- Reach outside the Home’s current core donors to build an ever-expanding universe of prospects
- Operate in a professional and entrepreneurial manner, utilizing development best practices, ambitious goals, and measurable metrics

Assumptions

In formulating this plan, the Kilkenny Children's Home is operating under the following assumptions:

- The KCH has developed a strong base of friends, prospects, and donors during its history, but has lacked the staff resources to effectively maximize those contacts

- Our board of directors is committed to the Home's growth plan.

- The area of greatest need for the Home is in developing an individual giving program. To date, the KCH has enjoyed strong foundation, government, and event programs, but has lacked the resources to efficiently tap into the individual giving market, which accounts for over 80% of all philanthropic gifts made in the United States

- The current fundraising environment will be a challenging one due to the state of the economy, which has led to dwindling savings, profits, and investment portfolios among our individual and corporate donors and falling endowments among those foundations which support us financially

- A well planned and entrepreneurial fundraising operation will allow the KCH to meet its ambitious revenue goals

Development Infrastructure

In order to effectively carry out this plan and build a professional development network, the Home will need to enlarge and strengthen its current development infrastructure:

Case for Support

The Home should develop strong case of support with several case statements aimed at our various funding prospects which provide both factual and emotional reasons for those individuals, corporations, government agencies and foundations to get involved with the KCH. These case statements must provide client anonymity while at the same time sufficiently draw donors into supporting our efforts. Similarly, the case for support and statements must provide a factual basis for our funding needs while being generic enough to be used in a wide variety of fundraising opportunities. Effective case statements will include compelling stories of the work that we do, coupled with evidence of the societal benefit of our work and

the efficient stewardship of donor resources. Case statements should be able to be used by board members, staff members, friends and others who are interested in generating support for our work.

Action Steps (Deadline)

- Research case for support best practices (April 10, 2009)
- Work with KCH program staff to locate / generate necessary information (May 1, 2009)
- Finalize case for support and 2-4 case statements (May 15, 2009)
- Present case and case statements for board approval (July board meeting)

Donor Database

The Home currently uses File Maker Pro to track donors and prospects. The reporting capabilities, relationship-building functions, and prospecting tools provided by the current software package are inadequate to meet the needs of a development organization of our current and future size. Consequently, the KCH should move to a fundraising-specific database package as soon as possible.

Bobbi Schmitt and Rob Davies have already performed significant research into the available software packages, which will substantially inform the database process. Further, the staff has determined that the optimal time for switching to a new database is at the end of the current fiscal year / beginning of the new fiscal year, July 1, 2009. The package must be in place, the data must be migrated, and the staff trained far enough in advance of that date to ensure a successful transition.

Action Steps (Deadline)

- Research database packages, pricing schemes, support, migration, and training issues (May 1, 2009)
- Finalize decision on database package (May 15, 2009)
- New database installed, data migrated, package fully functional (June 15, 2009)
- Staff training complete (June 25, 2009)
- Begin using new database (July 1, 2009)

Uniform Prospect and Donor Tracking Procedures

Once the database is fully operational, the KCH must have standard practices in place for handling new prospects and donors, including appropriate paperwork that may be used by the board, committees, affinity groups, and event hosts. These procedures should allow us to ensure that all prospects and donors

are entered into our database and cultivation systems with the appropriate level of information and that allows for correct and efficient follow-up to be made. Therefore, the Home should develop a small set of one-page memos and forms to be used in handling new prospects and donors, or when a donor or prospect is contacted by one of the friends of the Home.

These procedures cannot be effectively established until after our new donor database is in place.

Action Steps (Deadline)

- Develop necessary memos and forms for prospect and donor tracking (August 1, 2009)

Website

Most Home stakeholders agree that the time is right to redesign and update the KCH's website. The website redesign is a portion of the Home's overall marketing agenda, and thus the objectives and timelines for the website redesign will be handled in the agency's forthcoming marketing and public relations plan, and not in this document.

Until such time as that redesign is completed, however, the portions of the KCH's website that deal with fundraising and prospect development are in need of some updated features, copy, and creative design. Similarly, because this development plan will call for an e-mail marketing campaign as part of our donor cultivation plan, presented below, the development office needs to be sure that our current e-mail marketing capabilities will be able to effectively convey our fundraising message.

Therefore, the KCH should conduct a brief audit of our web and e-mail fundraising capabilities and creative, and make such changes as are necessary to effectively carry out our development mission until the overall web redesign is completed.

Action Steps (Deadline)

- Perform web, e-giving and e-mail fundraising capabilities audit and generate list of required changes prior to complete web redesign (June 15, 2009)
- Work with appropriate vendors and stakeholders to complete necessary changes (August 15, 2009)

Staffing

Depending on the success and growth velocity of both this plan and the forthcoming public relations/marketing plan, the development office should consider the possibility that it may need to bring on an

additional staff person at some point in the third year of this plan, or thereafter, to handle the growing donor account services work that will be necessary as we build donor relationships and affinity groups, as well to handle general office support for the development and public relations operations of the KCH. Because of the Home's limited resources, this decision should only be made when it is clear that a lack of additional staff support is hindering our work product.

Board Development Training

As will be seen from the rest of this plan, the active and informed participation of the Board of Directors in our fundraising efforts will be integral to our ultimate success. In addition to their current fundraising activities on behalf of the Home, members of the board will be asked to make donor cultivation calls, help populate both non-ask and ask fundraising events, hold events and expand our donor and prospect universe.

In conversations with board members regarding this plan, many members of the board expressed a desire to learn more about fundraising best practices and to hone their fundraising skills through additional development training.

The development staff, in conjunction with the Development Committee, should plan an ongoing board development training program to assist the board with meeting their fundraising goals on our behalf.

Action Steps (Deadline)

- Discuss board training schedule and goals at next Development Committee meeting and add result to overall development timeline (April 9, 2009)

Board Meeting Development Goals

Traditionally, the development office has been allotted time at the KCH board meetings for development reporting. This time is normally spent updating the board on development receipts and future goals. While the board should continue to receive regular development updates at these meetings, in the future, development time at board meetings should be more heavily weighted towards "activities." These activities should include reviewing prospect lists and assigning contacts, discussing and assigning donor/prospect cultivation calls, brainstorming contacts, events, and targets, and other items that will lead to an increased donor and prospect universe and additional dollars raised.

Donor Communications and Cultivation

Maintaining a uniform, scalable system of donor and prospect communications will be a key factor in leveraging the time and resources of the KCH's small development organization as we grow our donor universe. In pursuing an aggressive cultivation agenda, several prime methods will need to be established for communicating our message and needs:

Collateral Materials

In order to provide non-monetary methods for prospects to get involved with the KCH prior to making a financial commitment to our organization, the Home should prepare a list of volunteer opportunities that are available with our agency, as well as a "wish list" of tangible items that would aid us in carrying out our mission. Similarly, we should develop a comprehensive list of in-kind donations that would be beneficial to our agency to inform our efforts to get new donors excited and involved in our work.

Action Steps (Deadline)

- Research / organize lists of volunteer opportunities, in-kind donations, and "wish list" items at KCH (June 1, 2009)
- Prepare useable, well formatted documents based on these lists (June 10, 2009)

Command Appearance Script and Materials

As the KCH grows its individual, corporate, and foundation giving programs, numerous opportunities will arise for the development staff and/or executive director to hold one-on-one and small group meetings ("command appearances") with prospects to inform them about the Home's mission and current state of affairs. These meetings will often be "non-ask" meetings, similar to the "non-ask events" mentioned below, where the actual ask will take place after the meeting, in subsequent follow-up phone calls and/or meetings.

The KCH should prepare a strong, well-designed script for these meetings, as well as gather the collateral materials that would best support our message, to allow us to conduct effective meetings with relatively short notice.

Action Steps (Deadline)

- Prepare scripts and collateral materials list for command appearance meetings (June 20, 2009)

Non-Ask Events

For several years, the Home offered non-ask tour events to prospective donors on an every other month schedule. These tours were generally successful, but due to a lack of staff resources, the agency was not able to effectively follow-up with prospects that attended, or mine our network for additional attendees. The KCH should re-start a non-ask event program that can be used as a first point of contact with potential funders. These events should take two distinct shapes:

1. KCH Tour Events - The Home should re-start a system of in-house office tours for prospects to be conducted at our North County location or at any new location.
2. Outside Events (“KCH in a box”) – The Home should actively seek out the opportunity to hold non-ask events in other locations, such as local law firms, supporters’ offices, etc.

In order to make the best possible use of our limited resources, the KCH should prepare compelling scripts and materials for these non-ask events, and in our first year should limit the number that is held to allow for maximum leverage of staff time.

Action Steps (Deadline)

- Research the KCH’s previous tour program and non-ask event best practices (July 5, 2009)
- Establish schedule of Fall 2009 and Spring 2010 non-ask events, with goal of holding 4-5 events, with 1-2 events being held at outside locations (July 10, 2009)
- Develop and begin implementing prospect strategy for moving prospects to each event. Prospects should include current and former donors and prospects, former committee and board members, auction item givers, and a select group of brand new prospects (July 20, 2009)
- Develop scripts and materials for in-house and outside non-ask events (August 20, 2009)
- Hold first non-ask event (No later than November 1, 2009)

Prospect Cultivation Strategy and Timeline

Our goal for new individual and corporate prospects is to engage them in a non-threatening way, to tell them our story and our needs, and to make them feel like part of our team. Then, after the prospect is fully engaged and we have identified their area of interest, we can ask for funding in an effective manner.

Our first step with any new individual or corporate prospect should be to arrange for them to attend one of our non-ask events, or, if the prospect is at the appropriate potential giving level, arrange to meet with the prospect for a command performance. After the initial contact, we will need to communicate with the prospect on a regular basis to answer questions, continue to tell our story, and eventually seek support.

Our timeline for prospect cultivation will be as follows:

1. Receive information on new prospect from friend of the KCH, event, or other source
2. Perform basic research on prospect giving ability, source of funds, etc.
3. Determine who will make invitation call
4. Invite prospect to non-ask event or suggest command performance
5. Attend event / meeting
6. Within one week of event / meeting, perform follow-up call with prospect to determine level of interest and strengthen relationship.
7. If prospect indicates they are not interested in KCH, drop from list and STOP CULTIVATION. If prospect indicates some level of interest, add to prospect mailing list to receive appropriate communication from KCH
8. For interested prospects at higher levels, develop individual timeline for getting prospect more involved. For lower level prospects, add to ALL KCH communications (including mail asks) and schedule one follow-up call for after prospect has received written / e-mail communications from Home

Development Communications Strategy and Timeline

In addition to our prospect cultivation plan, it is imperative that the KCH strengthen its program of regular communications with donors and prospects. This program will be comprised primarily of non-solicitation communications for the purposes of building and stewarding our donor/prospect relationships, along with a few well-timed asks. Research shows that donors who are contacted and communicated with using a variety of online and offline formats give bigger gifts and give more often. Thus, our communications strategy will utilize the following varied tactics:

1. **Snail Mail:** We will continue to utilize standard postal mail for a number of communications, including our annual report, our newsletter (currently mailed once per year), event invites, and direct mail solicitations (e.g. the annual campaign)

2. E-Mail: The KCH will begin a program of regular e-mail communications, including one e-mail solicitation per year

3. Recognition Events: In addition to the non-ask events which will begin in the 2009-2010 portion of this plan, the KCH should begin a series of recognition events for appropriate level donors (e.g. lunch with the executive director for our top donors, a breakfast with a guest speaker for our mid-level donors, etc.) For additional information, see Donor Recognition Plan, below

4. Phone Calls: Donors at appropriate levels should be thanked, via phone, for their gifts after they are received, and also should be thanked, via phone, for their support at an appropriate time during the year, during a “Know-Your-Donor Campaign” targeted specifically at lower level donors that we don’t often talk with.

The KCH’s development communications timeline for the 2009-2010 year should be as follows:

| Donor/Prospect Level | July 2009 | August 2009 | Sept. 2009 | Oct. 2009 |
|----------------------|------------------------------|-------------|---|--------------------|
| \$500 and up | Summer Snail Mail Newsletter | E-Update | Annual Report | Annual Campaign \$ |
| \$499 and under | Summer Snail Mail Newsletter | E-Update | Annual Report w/ Re-engagement questionnaire | Annual Campaign \$ |

| Donor/Prospect Level | Nov. 2009 | Dec. 2009 | January 2010 | February 2010 |
|----------------------|---------------------------------|-------------------------|--------------|--|
| \$500 and up | Gala Sponsor Calls; E-update | Donor Recognition Event | | E-update |
| \$499 and under | E-update | Donor Recognition Event | | Know Your Donor Call Program; E-update |

| Donor/Prospect Level | March 2010 | April 2010 | May 2010 | June 2010 |
|----------------------|------------------|------------|-------------------|-------------------------------------|
| \$500 and up | Gala Mailings \$ | | E-Solicitation \$ | Annual Giving Program Launch |
| \$499 and under | Gala Mailings \$ | | E-Solicitation \$ | |

*In 2010-2011, the Home should determine whether staff resources will permit a Winter Snail Mail Newsletter, which may be mailed in December starting with December 2010.

Donor Recognition Program

The KCH should institute a donor recognition program to thank and encourage our donors and draw them into deeper relationship with the Home. This recognition program will have the following components:

1. Thank You Procedure: The KCH will continue its practice of ensuring that each large gift-giver receives a personal thank you call and that all gift-givers at all levels receive thank you notes following their gifts. The KCH should develop a script for these thank you calls that is designed to garner information and funnel it into a plan to grow and develop the relationship with that individual giver. In addition, for the 2009-1010 fiscal year, all new donors, regardless of size of gift, should receive a personal phone call, and be invited to a non-ask event. The KCH should seek out board member volunteers to make these calls.

2. Donor Recognition Event: Beginning this year, the KCH should host a small, informal, inexpensive, non-ask thank you event for donors at all levels, where we reinforce our mission with a quick update, perhaps offer a compelling speaker and an open bar, and let our supporters meet each other and build their relationship to the Home. The KCH should also consider inviting volunteers to this event.

3. Annual Giving Clubs: In addition to the thank you procedure and the donor recognition event, the annual giving clubs mentioned below will offer a complete range of donor recognition for members at each level.

Action Steps (Deadline)

- Prepare thank you call script, forms, and procedure sheet * Development Director will need to know checks that come in on a weekly basis with event code, and contact source (April 30, 2009)
- Solicit board member volunteers for calls and provide training materials (May board meeting)
- Write event plan for 1st annual donor recognition event to take place in December, 2009 (September 15, 2009)

Annual Giving Program

The key innovation for the KCH during the 2009-2010 fiscal year will be the introduction of a multi-year annual giving program aimed at individual donors. The purpose of using this program as our first major development project are twofold: first, as an efficient way of targeting individual donors and moving our current prospects to make a gift and our current donors to increase their gifts, and second, to provide a stable support system for the Home and begin to pull us out of our current “start from scratch every year” methodology.

Our strategy for starting this program will begin with re-engaging our current high-level donors and prospects through one-on-one meetings and phone calls, and re-engaging our lower level donors by including a questionnaire and note with our annual report mailing to these donors, and making follow-up calls regarding returned questionnaires where appropriate. These calls and meetings will also serve as an opportunity to ask for new gifts this year, prior to the launch of our annual giving program, wherever appropriate.

The KCH will develop 3-4 giving levels, along with an appropriate number of recognition methods for each level. Similarly, the KCH will develop collateral materials explaining the program, including pledge cards asking for a three year commitment to one of these levels, and will brand the program with an appropriate name and logo.

Over the course of this year, as we re-engage our current prospects and donors, we will be preparing for the launch of our annual giving program, in June, 2010. Depending on the response to these meetings and the number of annual giving program prospects in our universe, we will roll out the program in June, 2010 with either a launch/pledge event or with one-on-one and small group meetings. Under either scenario, the KCH should make a big deal out of this launch. All pledges made during the June, 2010 roll out would begin funding in the 2010-2011 fiscal year, and would provide a solid foundation for our

fundraising efforts that year. In this or future years, there is also the possibility of adding a challenge / matching gift component to the annual giving program event.

To make this plan effective, we will also need to make changes to The Board Giving Campaign. For 2009-2010, the board giving campaign will continue as normal. However, for 2010-2011, the KCH should ask the board to include the “board giving campaign” as a leadership portion of the annual giving campaign. Thus, for 2010-2011, the board would be asked to make a financial pledge during the annual giving program roll-out in June, 2010, with the funding not occurring until the 2010-2011 fiscal year. Thenceforth, the Board Giving Campaign would serve as a leadership component of each year’s annual giving program.

Action Steps (Deadline)

- Develop list of prospects and donors for re-engagement and determine method of re-engagement (August 10, 2009)
- Develop re-engagement questionnaire and materials for low-level donor mail-out (August 20, 2009)
- Begin high-level donor and prospect re-engagement calls and meetings (begin no later than September 10, 2009)
- Complete low-level donor questionnaire follow-up (complete no later than January 10, 2010)
- Create annual giving program levels, brand, logo, etc. (February 1, 2010)
- Create collateral materials for annual giving program (February 15, 2010)
- Develop master list of annual giving prospects for launch (March 15, 2010)
- Decide on launch structure and event/meeting planning requirements (March 15, 2010)
- Work with board on leadership gifts / board giving campaign for annual giving program (April 10, 2010)
- Mail invitations to launch events and/or schedule launch solicitation meetings (April 15, 2010)
- Hold Annual Giving Program Launch (June, 2010)

Year 2 (2010-2011)

- Continue program growth; replace donor re-engagement with high level donor and prospect meetings as part of the donor cultivation plan

Year 3 (2011-2012)

- Continue program growth; consider adding annual giving program leadership structure and/or committee

Direct Mail Program

The KCH will continue to mail out its annual campaign appeal letter in the fall of each year, and in year 2 of this plan, will research the benefits of a more comprehensive direct mail prospecting and housefile mailing program.

Affinity Group Program

The Kilkenny Children's Home currently has a strong board structure, as well as a highly effective committee working on The Gala, the Home's marquee annual event. To date, the KCH has not offered many opportunities for its friends and donors to interact and network with each other outside of these committees and the Gala event.

Starting an affinity group program based on members' common interests would not only allow the KCH to offer additional recognition and benefits to its supporters, but would also provide an easy way for our supporters to invite their friends to join them in their support in a non-threatening manner. These affinity groups should be asked to provide knowledge/suggestions, volunteers, and eventually funding to support the work of the KCH.

While there are many affinity groups that may be started to support the Home, the group with the best potential for a quick start-up would be a group of attorneys who supported the KCH. There are a number of attorneys who already contribute time and money to the Home, and these lawyers should provide a solid foundation for our affinity group efforts. Additional affinity groups may be started in subsequent years.

In order to efficiently organize each group, the Home should seek out a core group of potential members to form a steering committee, which will name the group, solicit members, and help drive the affinity group effort. Each group may also have its own collateral materials, as needed, to aid the members in their work on our behalf. Groups should be presented with a multitude of ways to help, including but not limited to monetary contributions.

Action Steps (Deadline)

- Begin prospect list for lawyers affinity group steering committee (February 1, 2010)
- Begin soliciting prospects for steering committee (February 20, 2010)
- Create agenda and collateral materials for steering committee meeting (March 31, 2010)
- Hold lawyers affinity group steering committee meeting (April, 2010)

Year 2 (2010-2011)

- Expand lawyers affinity group
- Create second affinity group for KCH (possible groups: Young Friends of the Home, Business Leaders Supporting Kids)

Year 3 (2011-2012)

- Expand current affinity groups
- Create third affinity group for KCH

Major Event: The Gala

The KCH has had great success with the Gala, which should remain the Home's one "marquee event" each year. Each of our funding sources, from individuals to corporations to affinity groups can and should be re-solicited each year for this one event, even if they have already made a substantial gift to the Home during the year.

While this event initially began as a Young Friends of the KCH event, it has begun to morph into an all-Home fundraising event and showcase for our work (through the awards, etc.) The KCH should, with the approval and support of those who have driven the event each year from the board and elsewhere, make this our official fundraising event each year, and drop the "Young Friends" moniker. (The Young Friends group should, however, be restarted with its own event as an affinity group, see above).

Our goal for the Gala should be to substantially grow this event, through the introduction of well-known headliners, business and celebrity partners, event chairs and co-chairs, and by seeking "adoption" of the event by large giving networks (the Eagles, labor unions, etc.)

Action Steps (Deadline)

- Create detailed event plan and timeline for Gala 2010, including review of ticket prices and giving levels (September 15, 2009)
- Create detailed sponsor and ticket sale plan and timeline for Gala 2010, including a plan for substantially growing the event, as mentioned above (September 30, 2009)

Year 2 (2010-2011)

- Continue event growth, consider seeking additional well-known headliners for event

Year 3 (2011-2012)

- Continue event growth, consider adding affinity group pre- or post-event components

Hosted Event Program

Recently, the KCH has begun having great success with “hosted events,” small house parties and other gatherings held by board members and supporters to raise money for the Home. These small events serve three purposes: (1) raising money for the Home, (2) raising awareness of the Home, and (3) generating new prospects for future fundraising efforts.

The KCH should develop a scalable program for encouraging and supporting our friends to host events on our behalf by creating an “event in a box:” a handbook detailing how to hold an event on our behalf, along with the supporting materials a prospective event host will need in preparing for their event.

Additionally, a core group of supporters has held extremely successful charity golf tournaments on our behalf for a number of years. These hosted events are an integral part of our funding stream, and should be continued. This group has indicated a desire to have the KCH staff take a larger role in planning this even, which occurs every fall. The Home development staff should speak with the group leadership to determine what level of involvement we need to have this year and over the coming years, and to develop an event plan for this year’s event.

In addition, during the 2009-2010 fiscal year, several North County Rotary Clubs are hosting a Black Tie Dinner Event and Fashion Show on our behalf.

Action Steps (Deadline)

- Speak with Golf Committee regarding 2009-2010 Golf Event (June 1, 2009)
- Develop event plan and timeline for KCH's involvement in Golf Event (June 20, 2009)
- Develop "Event in a Box" handbook and materials for use by our supporters (August 31, 2009)
- Develop and begin implementing plan for seeking sponsors for Rotary Event (September 15, 2009)
- Develop strategy for seeking out supporters to host events on our behalf (September 20, 2009)
- Seek one additional hosted event for Fiscal Year 2009-2010 (October 31, 2009)

Year 2 (2010-2011)

- Goal: 2-3 events hosted on our behalf + golf tournament

Year 3 (2011-2012)

- Goal: 3-4 events hosted on our behalf + golf tournament

Foundation Giving

Traditionally, the KCH has had a very strong program soliciting grants from philanthropic and corporate foundations. The Home can and should continue aggressively pursuing grants as a source of funding our program activity and expansion. Bobbi Schmitt will continue to be primarily responsible for grant-writing and prospecting.

To promote larger and more sustained gifts, Rob Davies and Jim Martin will begin a program of meeting with grant-makers and grant prospects to showcase our programs and build deeper relationships with key decision makers. We will also invite current and prospective grant-makers to attend our non-ask events.

Because we will not be adding additional grant-writing staff, our plan for growing our foundation giving will rely primarily on utilizing the above mentioned meetings and the relationships we build to seek larger grants, as well as adding some larger grant prospects to our current solicitation mix.

Action Steps (Deadline)

- Create 2009-2010 foundation giving plan, including detailed prospect lists and timelines (May 31, 2009)

- Develop list of current and prospective grant makers to invite to non-ask events (July 15, 2009)
- Develop list of current and prospective grant makers to invite to one-on-one and small group meetings (September 1, 2009)
- Rob Davies and Jim Martin begin ongoing series of meetings with foundation executives (October 1, 2009)

Year 2 (2010-2011)

- Continue growing program and seeking out larger grants

Year 3 (2011-2012)

- Continue growing program and seeking out larger grants

Government Funding

The state, local, and federal governments all currently provide or direct funding to the Home. This funding comprises a significant portion of our annual revenues. The KCH should continue to seek forums for educating government officials about the good work that we do to both prevent a decrease in government funding as well as seek increases whenever appropriate. In order to do so, the KCH should perform a review of its current government funding and any opportunities for growth, as well as create a list of government officials to target for one-on-one meetings, tours, etc.

Additionally, the KCH has developed a plan for seeking additional, stable government funding by adding a court charge to civil court filings in Kilkenny County (note that this represents a change in the Home's original goal of adding a charge at the state level, which was fraught with difficulty). A generous donor has offered to fund the hiring of a lobbyist for the purpose of both increasing the Home's funding as well as maintaining our profile among governmental stakeholders. The Home should utilize this funding and begin speaking with lobbying firms to determine the feasibility of our plan and the recommended course of action.

Action Steps (Deadline)

- Develop list of government officials to target for relationship-building and plan for doing so (August 15, 2009)
- Perform review of current government funding and potential (September 1, 2009)
- Confirm lobbying gift level and duration with donor (September 1, 2009)

- Hold meetings with prospective lobbying firms to determine feasibility and course of action and solicit proposals (November 15, 2009)
- Review proposals and generate short lobbying plan based on these materials (December 15, 2009)
- Engage lobbying firm to solicit funding stream on our behalf (January 15, 2010)

Planned Giving

During the upcoming fiscal year, the KCH should remain focused on increasing its individual prospect base, starting a comprehensive donor communications program, and launching an annual giving program, as well as maintaining its foundation and event giving. As our programs increase and strengthen, the Home should be prepared to solicit planning gifts and bequests from our friends and supporters.

While this planned giving program will not be a major focus of our fundraising efforts during the coming year, we can and should be prepared to aid those who want to include the KCH in their wills, even if we are not yet marketing this avenue for supporting our work. The best way to be prepared is to create a short document, with the help of our supporters in the legal and non-profit development fields, detailing the options for making a bequest to the KCH.

Action Steps (Deadline)

- Work with supportive professionals to create a simple document detailing the options for making a bequest to the KCH and ensuring that we have the necessary capabilities to accept such bequests (February 15, 2010)

Year 2 (2010-2011)

- Begin including simple language on making a bequest on the KCH website and in other Home documents

Year 3 (2011-2012)

- Evaluate benefits of a larger “planned giving” roll out and, if appropriate, create plan for a larger campaign.

United Way Giving

In addition to becoming a United Way Partner Agency, the KCH has had moderate success recently with generating financial support through the United Way's workplace campaigns. While the Home would prefer to receive contributions directly to avoid administrative costs, we recognize that not only is the United Way Campaign a more convenient way to give for many prospects, but also that many people who might be inclined to give to us through the United Way may otherwise not give at all.

Therefore, the KCH should be sure to include information on the United Way Workplace Campaigns, including our donor choice numbers, in appropriate donor and prospect communications this year, and in Year 2 of this plan, should investigate additional ways of marketing our agency and the option of giving through the United Way to targeted companies throughout the area.

Action Steps (Deadline)

- Include United Way giving information in appropriate donor communications (ongoing)

Year 2 (2010-2011)

- Research best practices for increasing United Way giving
- Develop and implement plan for increasing United Way giving

Year 3 (2011-2012)

- Continue program growth

Major Giving / Capital Giving Options

In addition to the development tactics listed above, should the KCH relocate during the 2009-2010 fiscal year, the Home should consider using this relocation project as a method for soliciting contributions from major donors in a method similar to a capital campaign. Options for large one-time gifts include naming rights, multiple-year endowments of additional staff positions or program costs, and a greatly expanded donor recognition program utilizing our new office space (plaques / giving level wall / etc.)

Additionally, during our donor meetings and throughout the growth of our annual giving program, KCH staff and board members should diligently seek out opportunities for major gifts to build cash reserves, endow programs, and meet individual giving needs.

Miscellaneous Opportunities

In addition to the fundraising tactics laid out above, the KCH should remain mindful of seizing fundraising opportunities as they arise. We should be prepared to listen to the suggestions of our stakeholders and friends, and be prepared to implement the many good ideas that cross our path each year.

Two opportunities that we should be diligent in seeking are the opportunity to be named “official” or “partner” non-profit agency for a local business, civic group, or other network, and the opportunity to hold a participatory fundraising event (“-athon”, “drive”, school fundraising partnerships, etc.)

Action Steps (Deadline)

- Review progress of donor re-engagement and prospect calls / meetings to determine opportunities for “partner” agency status and participatory fundraising events (December 20, 2009)

(continued on next page...)

Fundraising Needs and Goals

For the 2009-2010 fiscal year, the KCH budget has estimated total expenses at \$1,161,901. Of that amount, **the following revenue shall be carried over from the prior fiscal year**, and spent in its entirety in 2009-2010:

| | |
|--------------------------------|-----------------|
| George Foundation Grant | \$22,700 |
| Anonymous Grant | \$91,817 |
| City Initiatives Grant | \$125,704 |
| <u>Biscayne Grant</u> | <u>\$30,000</u> |
| Total Balance Carried Forward: | \$270,221 |

In addition, **we expect the following revenue from government sources:**

| | |
|---|-----------------|
| County Contract (no change from prior year) | \$233,912 |
| Municipal Contracts | \$10,000 |
| Violent Crime Bill Authorizations | \$69,152 |
| <u>Attorney General's Office</u> | <u>\$91,345</u> |
| Additional expected revenue: | \$404,409 |

Total "in hand" funding: \$674,630

Total additional revenue needed: \$487,271

Our revenue projection for fundraising activities in 2009-2010 is as follows:

| | |
|---------------------------------------|-----------------|
| Foundation Giving / Grants | \$150,000 |
| Major Events (The Gala) | \$120,000 |
| Hosted Events | |
|Golf Tournament | \$50,000 |
|Rotary Event | \$20,000 |
|Additional Hosted Event | \$2,500 |
| Direct Mail | |
|Annual Campaign | \$24,000 |
| United Way | \$17,500 |
| Online Giving and E-mail solicitation | \$5,000 |
| Interest | \$2,150 |
| Board Campaign | \$20,000 |
| Corporate Giving | \$20,000 |
| <u>Individual Giving</u> | <u>\$57,500</u> |

Total projected revenue: \$488,650

Consolidated Action Step Timeline

March, 2009

March 15: Complete solicitation of additional Gala auction item donors

March 16: Gala Planning Committee meeting. Focus: Tickets and Sponsors

March 20: Complete Gala 2009 sponsor non-renewal calls, where necessary

March 20: Roberta Roberts Event: Do Plan, Do items for meetings, do press release she requested, plan for her walk a thon, including collateral materials

March 20: Complete 2009-2010 Development Expense Projection and Budget

March 31: Complete development plan stakeholder conversations; complete plan edits

March 31: Generate call list and script for staff calls to last year's auction item donors who did not renew this year + prospect lists for calls

April, 2009

April 1: Send out Jackie Press release & build basic media list

April 1: Generate list of complimentary invitees for Gala, complete invitation process (whatever method is appropriate) – one should be Amanda Roman and guest

April 1: Annual campaign follow up calls

April 5: Develop event plan for our involvement in Roberta Roberts event

April 9: Discuss board training program with development committee, add result to overall development timeline.

April 10: Research case for support best practices

April 10: Check in with board members re: Gala 2009 ticket and sponsorship sales, and auction items

April 12: Begin stakeholder conversations on PR Plan

April 12: Learn constant contact online and figure out our plan for using it as part of our development communications plan.

April 17: Check in with committed Gala 2009 sponsors who have not submitted check

April 17: Email all board members re: Auction items will not be listed in program unless they are in by 4/20, still accepted after though.

April 30: Prepare thank you call script and training materials for gift thanking procedure

April 30: Complete stakeholder conversations on PR Plan, begin writing PR Plan

April 30: Talk with Rob about expanding Development Committee to include non board members, start talking about who and when

May, 2009

May Board Meeting: Solicit board member volunteers to participate in non-ask event program

May 1: Work with KCH program staff to locate/ generate necessary information for case for support

May 1: Research database packages, pricing schemes, support, migration, and training issues

May 10: Send out e-mail blast highlighting Roberts event and Walkathon.

May 15: Complete PR Plan

May 15: Create Roberts event booklet with Dickinson poems, sponsor names, KCH info, etc.

May 15: Develop communication plan for July Snail Mail Newsletter

May 15: Write draft case for support

May 15: Finalize decision on database package

May 20: Create Roberts Art sign in sheet for exhibition, and one for event.

May 20: Send out Roberts Art Event press release

May 23: Check in with Roberta Roberts re: art and walkathon events, sponsors, ticket sales, etc.

May 24: Press release for Roberta Roberts Event and exhibit

May 31: Plan for board giving for those who have not given yet this FY

May 31: Develop list of key Gala volunteers and stakeholder for next year's committee. Plan thank you social event.

June, 2009

JUNE EVENT: Roberta Roberts hosted event

June 1: Speak with GolfCommittee regarding 2009 Golf Event (no later than this date)

June 1: Provide Roberta Roberts with, KCH flyers, annual reports, envelopes, etc.

June 10: Develop communication plan for September Annual Report

June 20: Prepare scripts and collateral materials list for command appearance meetings

June 20: Develop event plan and timeline for KCH's involvement in Golf Event

July, 2009

JULY COMMUNICATION: Snail mail newsletter

July 5: Research KCH's previous tour program and non-ask event best practices

July 30: Finalize Gala 2010 Line-by-Line

July 30: Research / organize lists of volunteer opportunities, in-kind donations, and "wish list" items at KCH. Prepare useable, well-formatted documents based on volunteer opportunities, in-kinds, and wish list items

August, 2009

AUGUST COMMUNICATION: E-update

August 1: Develop necessary memos and forms for prospect and donor tracking

August 10: Develop communication plan for October Annual Campaign mailing

August 10: Develop list of prospects and donors for re-engagement and determine method of re-engagement for Annual Giving Program and donor-engagement calls / meetings. Include board members calling low and midlevel people for re-engagement, including training, materials, and scripts.

August 10: Establish schedule of 2009-2010 non-ask events, with goal of holding 4-5 total events, 1-2 of which are held at outside locations

August 10: New database installed, data migrated, package fully functional

August 15: Work with appropriate vendors and stakeholders to complete changes identified in web fundraising capabilities audit

August 15: Develop list of government officials to target for relationship building and plan for doing so

August 15: Perform web, e-giving, and e-mail fundraising capabilities audit and generate list of required changes prior to complete web redesign

August 20: Develop scripts and materials for in-house and outside non-ask events

August 20: Develop re-engagement questionnaire and materials for low-level donor mail-out of Annual Report

August 31: Develop "Event in a Box" handbook and materials for use by our supports in hosting events on our behalf

August 31: Finalize 2009-2010 foundation giving plan, including detailed prospect lists and timelines [This is a new due date, pushed back from June]

August 31: Develop and implement strategy for moving prospects to our non-ask events including list of current and prospective grant donors to invite to non-ask events

September, 2009

SEPTEMBER COMMUNICATION: Annual Report

September 1: Develop list of current and prospective grant makers to invite to one-on-one meetings

September 1: Perform review of current government funding and potential

September 1: Confirm lobbying gift level and duration with donor

September 10: Begin high-level donor and prospect re-engagement calls and meetings (no later than this date)

September 15: Write event plan for 1st annual donor recognition event to take place in December, 2009

September 15: Create detailed event plan and timeline for Gala 2010, including review of ticket prices and giving levels, plus plan for auction, including massive data entry and mailing effort to start

September 15: Develop and start implementing plan to sell sponsorships for Rotary Event

September 20: Develop strategy for seeking out supporters to host events on our behalf

September 30: Create detailed sponsor and ticket sale plan and timeline for Gala 2010, including a plan for substantially growing the event

October, 2009

OCTOBER COMMUNICATION: Annual Campaign direct mail piece

OCTOBER EVENT: Golf Event

October 1: Rob Davies and Jim Martin begin ongoing series of meetings with foundation executives, subject to their availability (no later than this date)

October 10: Develop prospecting plan for November's Gala 2010 sponsor calls

October 31: Seek out one additional hosted event for this fiscal year (no later than this date)

November, 2009

NOVEMBER COMMUNICATIONS: Gala 2010 sponsor calls; E-update

November 1: Hold first non-ask event no later than this date

November 15: Hold meetings with prospective lobbying firms to determine feasibility and course of action and solicit proposals (complete no later than this date)

December, 2009

DECEMBER EVENT: Donor Recognition Event

December 15: Review proposals and generate short lobbying plan based on these materials; choose firm to engage

December 20: Review progress of donor re-engagement and prospect calls / meetings to determine opportunities for "partner" agency status and participatory fundraising events

January, 2010

January 10: Complete low-level donor re-engagement questionnaire follow-up

January 15: Develop communication and call plan for February's Know Your Donor Call Program

January 15: Engage lobbying firm

February, 2010

FEBRUARY COMMUNICATION: E-update; Know Your Donor Call Program

FEBRUARY EVENT: Rotary Gala Event and Fashion Show

February 1: Create annual giving program levels, brand, logo, etc.

February 1: Begin prospect list for lawyers affinity group steering committee

February 15: Create collateral materials for annual giving program

February 15: Work with supportive professionals to create a simple planned giving document; perform review of our capabilities for accepting such gifts

February 20: Begin soliciting prospects for lawyers affinity group steering committee

March, 2010

MARCH COMMUNICATION: Gala invitation mailings

March 15: Develop master list of annual giving program prospects for launch

March 15: Decide on annual giving campaign launch structure and event/meeting planning requirements

March 31: Create agenda and collateral materials for lawyers affinity group steering committee meeting

April, 2010

APRIL EVENTS: Lawyers affinity group steering committee meeting, Gala 2010

April 10: Work with board on leadership gifts / board giving campaign for 2010-2011 as part of annual giving campaign launch

April 15: Mail invitations to annual giving campaign launch events and/or start scheduling launch solicitation meetings

May, 2010

MAY COMMUNICATION: E-Solicitation

June, 2010

JUNE EVENT: Annual Giving Program Launch