

2019 Development Strategy

Overview: Relaunch

2019 is the year to relaunch fundraising against the backdrop of the 10th anniversary of the program. Development efforts will focus on major donor relationships, with the CEO in the lead fundraising role working in close partnership with the board. By working collaboratively in a system that stresses best practices in donor cultivation, the board and founders can test new ideas, revitalize existing relationships, and attract new donors. This is a true moment of inflection as the organization enters its second decade, professionalizes and formalizes the development function, and breathes new energy into building a sustainable financial base.

Objectives for the Development Strategy

1. Create a more sustainable fundraising function. Increase giving.
2. Strengthen the case for support.
3. Build stronger support systems for the board.
4. Increase strategic focus; establish best practices.
5. Improve donor retention and new donor acquisition.
6. Limit fundraising expenses.

Leadership

The CEO has reimagined her role as co-founder and lead fundraiser, embracing her development skills and experience and her gravitas as co-founder and creator of the program. With greater clarity gained in 2018 about her role and ongoing practice and learning, 2019 is the right time to buckle down and hit the road to build the relationships that will sustain the organization. The co-founder initiated and still carries a number of key donor relationships. His return in early 2019 to relationship building and outreach will be an additional strength.

However, the board's thought partnership and its own recommitment to outreach and donor cultivation will be critical to this new approach. Adding new board members will also give this strategy greater likelihood of success.

Ways for the Board to engage with the development plan (beyond making a gift):

1. Ambassadorship: talking about the organization and sharing your passion.
2. Introduce 2 new prospects to the organization.
3. Host or help plan events.
4. Bring guests to events.
5. Market the Guest Program to your contacts.
6. Support and advise on strategy for donor outreach and follow up.
7. Update your LinkedIn to include board membership.
8. Share the organization's social media, blog, and email updates with your network.

Ambassadorship is not Asking

Being a development board member does not mean asking for money.

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But *successful* fundraising asks depend on a cadre of board ambassadors who are in regular communication with their networks and the community about the organization, and who serve as inspiration and validation.

The board, founders, staff, and key donors are deeply committed and have the organization “in their bones.” This passion – their stories – are the lifeblood of continued development growth.

Sharing the story and giving others an opening to engage and become involved is the role of the board. Ambassadors bring others closer to the mission by inviting them to meet the Founders, watch videos about the organization, attend events, or, ideally, visit the program. Staff will be prepared to make the ask at the right time in the right way to secure support.

Teamwork and Trust

Teamwork and trust are critical. The organization will build both by:

- Staff reporting more consistently to the board on fundraising results.
- Using a tracking tool for this strategy to increase transparency around both wins and losses.
- Ask the board to share feedback regularly.
- Acknowledging and recording all gifts promptly and accurately (same day thank you note, tax letter within 3 days, and monthly reconciliation of donor database.)
- Informing the board when their contacts give so board can thank.

Maintaining Strategic Focus

Success depends on the board and staff holding each other accountable to the plan. This means executing on the plan and hitting the milestones indicated. It also means ensuring that no new initiatives or plans are launched. Adopting additional new ideas or reacting to “shiny objects” in 2019 will inevitably detract from the core strategies.

Communications and The Pitch

A new fundraising pitch will emphasize 2019 goals and results from the first 10 years and focus more on the organization’s students and the impact the organization has on their lives. The founders’ story is an important one but is not the primary message, taking a back seat to program results and our students. The girls’ academic performance and success in life are the story. The mission and program impact both need to be shared at every turn, preferably as told by students themselves.

The pitch is to support the organization’s program as a whole, not to earmark gifts. While particular efforts (alumni, recruitment, evaluation) may be emphasized for illustrative purposes, the pitch is for unrestricted support.

Marketing and PR

Raising awareness of the organization with the public where feasible will be helpful. With limited staff and resources, the organization has rightly deprioritized a formal PR function. The most important marketing the organization needs to do is directly and personally with its ~1,000 donors.

However, the potential CNN segment in early 2019 serves as validation of the organization from a trusted national media brand and should be seized on. Steps to amplify this kind of media exposure – this CNN spot and future opportunities that arise at little or no staff time or cost to the organization – include:

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- Ensure staff time and any cost will be justified.
- Plan ahead to have the right messenger, right message, and right images.
- Have a photographer capture candid of the CNN crew shooting (CNN will not provide this.)
- Package and share after with donors and prospects via email with a brief message about the organization.
- Board and staff include in all outreach emails for meetings, “In case you missed it...”
- Reference in the one-pager case for support.
- Share on social media and include in the newsletter.

While this is not a fundraising tool, the above steps help create excitement and make the most of this no-cost exposure.

Communications to Major Donors (\$1,000+) – new focus on all \$1,000+ donors, with some variation for \$2,500 sponsors maintained from existing practices

- Invite to meet with CEO.
- Handwritten notecard with thanks from CEO or board upon receipt of gift
- Board continues to cultivate their contacts
- Quarterly touches:
 - Two newsletters, with customized personal note from CEO or board
 - Two other personal touches – meeting, board member outreach, custom note or call)
 - Letters from students to sponsors and also to major donors where possible
 - Custom note from CEO.
- Invitation to meet students and alumni at 10th anniversary events
- Invitation to events, cultivation by Board members (seated next to, personal attention at cocktails etc.)

Donors (less than \$1,000)

- Handwritten notecard with thanks from CEO upon receipt of gift
- Two newsletters, personalized
- Social media and email stewardship
- Select invitation to events, space permitting
- Donor survey

Prospect pipeline a critical need

Organizations need continuous flows of new donors to fuel growth and to replace those who stop giving. The organization does not currently have a sufficient donor pipeline.

The most impactful way to inspire support is to connect donors to the girls and the program directly. Distance to campus is the single largest obstacle to fundraising sustainability as it creates a barrier to a steady pipeline of new donors.

The organization’s efforts to bring groups and families to observe program will continue. These trips engage donors and provide unrestricted support.

In 2019, the organization will explore a new strategy of offering group day tours to patrons of local tour companies. This strategy has already been pursued successfully by another organization also co-founded by Americans, to create a steady pipeline of new donors. (Draft plan included below.)

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Giving Goal

Increase giving to the organization by raising \$3,440,000 in 2019

- 6.6% increase over 2018
- Set an aspirational goal to raise additional \$250,000 beyond goal for defined special purpose.

Key #1: Execute on 5 major push points for giving

- Continue to execute on existing fundraising events, incorporating a strategic emphasis on relationship-building and major donors as needed.
 - Valentine's Day capital needs solicitation
 - Walk-a-thon
 - End of Year campaign
 - Fall board gala event

Key #2: Increase meetings and personal contact with donors

- Orient staff and board time to activities that build deeper relationships with major donors.
- Create and track activity goals for staff and board.
- Each board member introduces 2 new major donors to the organization (not including gala) in 2019.
- 4 face to face major donor meetings per month, with board partnership through introductions and advice.

Key #3: Focus on donor acquisition

- To drive future growth: explore and test new donor acquisition strategy offering tours through local tour companies.
- 10% increase in # of \$1,000+ donors (15 net new donors) in 2019
 - Increase capacity at Fall event (5 new donors)
 - CEO and Board outreach (5 new donors)
 - Tours/trips (5 new donors)

Key #4: Pursue an aspirational goal to increase support by \$250,000 beyond goal

- Raise sights, create \$25k giving level and seek six upgrades to this level (\$150k)
- Raise corporate sponsorships for 10th anniversary event (\$50k)
- Add 2 new board members with \$10k capacity (\$20k new giving)
- Raise 12 new \$2,500 gifts in honor of the 10th (\$30k)

See Budget Comparison Summary for breakdown of goal by fundraising activity

Key Strategies

- Build a relationship-based major gift program
- Leverage the 10th anniversary to launch the next decade of results
- Professionalize and strengthen development processes
- Focus on a new donor acquisition strategy

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Strategy Implementation Plans

Build a relationship-based major gift program

Note: In general, send individual email more frequently to major donors instead of mass emails. Emails from mail servers is often caught in spam boxes, and social media may not reach the target audience at all.

Strategy: Create an updated case for support

- Major donor case statement around the the organization's students, emphasizing results and vision.
- Complete strategic planning (define vision and rough goals for next 3 to 5 years.)
- Test case statement in 10 donor meetings in Q1 and Q2, then refine.

Strategy: Enhance donor management systems and practice portfolio management

- Major donor tracking spreadsheet, updated regularly, to complement database.
- Prospect portfolio management by CEO partnering with board members.
- Create strategies for all \$2,500+ donors.
- Execute on 4 meaningful touches per year per major donor.

Strategy: Engage the board in major gift fundraising

- Use email/text/calls to share good news with board members in real time.
- Regular 1:1 board member meetings to discuss development and review strategy.
- Chair-led, personal, annual solicitations of board.
- Broaden donor relationships to include both a founder and board member so each major donor has multiple connection points into the organization.
- Discuss development at every board meeting and report on the numbers.

Leverage 10th anniversary year to launch the next iteration of the organization

Strategy: Execute early, plan ahead

- Set date and location by January, pre-load invitations.

Strategy: Use an honorary host committee to build excitement and attendance

- Ask to lend name and attend.
- Aim for 15 to 20 members, consider a small event in a private home to cultivate.

Strategy: Build a strong program featuring students and alumni

- Students and alumni tell the story in their own voices and guests are powerfully connected and moved.

Milestones/Keys:

- Each board member buys (or fills) a table and brings their contacts to gala.
- \$200k raised (included in total fundraising goal.)
- 150 attendees with highest capacity to give, including 25 new prospects.
- 100% underwritten by local companies, every dollar goes to the girls.

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Professionalize and strengthen development processes

Strategy: Implement new processes

- See sample processes below

Strategy: Standardize reporting

- Establish baseline 2018 data on number and size of gifts to report against.
- Reconcile the donor database and accounting system monthly.
- Report on fundraising progress quarterly.

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Focus on donor acquisition

Strategy: Research foundations to identify potential fit and create a plan to approach in 2019/2020

- Use outside resource (contract or consultant)
- Identify top 10 foundations to pursue.
- Determine fit and prioritize.
- Share with board and donors seeking introductions.
- Pursue relationships.

Strategy: Continue to grow the Guest Program

- Market as milestone trip for 50th/75th birthday, anniversaries, graduations, etc.
- Present to prospects and donors as additional way they can engage with and support the organization.
- Follow up with past guests/visitors to campus to engage as donors.

Strategy: “Tour Company Partnership” Concept Sketch

Objective: Acquire new donors of \$1,000+ that require no more than letters and newsletters to renew their gift each year. Secure steady stream of at least 50 new donors per year by 2021.

- Work with local lodge(s) to offer tours to their guests.
- Lodge provides a bag lunch for their guests.
- Campus tour led by an alum, learn about the mission and observe a classroom.
- Tours are free, no sales or asks, just inspiration.
- Guests sign up for emails and newsletter, some give on the spot.

Potential advantages of offering day tours

- Scale: there are many more prospects already visiting lodges than the organization can reasonably expect to bring on their own.
- Mission fit: giving a free tour to lodge guests positions the organization as a benefit to the visitor, not as a cost. The visitor has not paid for the experience – more likely to give the organization a gift.
- Lower cost and risk: tours are inexpensive to provide and carry little risk. Conversely, bringing groups ourselves requires investment and carries the risk of accident, injury, or dissatisfaction with the vacation experience.
- Synergy with the community: offering tours provides a service to the local lodges, while running tours could be perceived as a threat to neighboring businesses.

Risks and uncertainties

- Lodges and tour companies existing relationships with schools may preclude partnering
- Visitors may not convert to donors at a high enough rate
- Building to scale may take 2 to 3 years
- Managing the process from overseas relies on a new kind of collaboration, organizational buy-in is critical

Next steps and milestones

- CEO meet with program leaders about concept, identify concerns/additional ideas
- Cultivation plan to enlist a lodge as partner
- CEO leads on the strategy, program staff lead on execution

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- Plan a test run tour in first half of 2019 that leads to at least 2 new donors of any size.
- CEO meet with lodge leadership on next trip and join a tour
- Evaluate and refine by end of 2019, plan wider rollout in 2020 with 5 tours leading to 20 new donors.
- Target of 50 new donors as a result of tours in 2021.

2019 Strategy Implementation

- Staff refer to goals regularly, update as progress is made, gather regular feedback
- Monthly check-ins with a coach to review progress to goals
- Quarterly resets to adjust/refine/refocus as needed
- Share out progress to the board at mid-year to promote transparency

Implementation Tracking: CEO Plan

		Jan	Q1	Q2	Q3	Q4	TOTAL
<i>Sample</i>							
<i>Goal #1</i>	Increase giving						
	8 donor 1:1 per month	3	15	27	22	38	96
	100% board participation	3/10	7/10	10/10			
	Increase giving						
	\$ giving goal						
	100% board participation						
	5 Board 1:1 per Qtr						
	4 donor 1:1 per month						
	2 new prospects per Board member						
	2 upgrades to \$25k						
	Build major gift program						
	Major Donor Case statement by Jan 31						
	One-pager by Feb 15						
	Create prospect list, manage it						
	\$2,500+ "touch" each quarter						
	Engage board						
	Dev update every meeting						
	Devo committee 1 mtg/month						
	Two new board recruitments						
	1 board culture of philanthropy/qtr						
	1:1 board solicitations						
	Leverage 10th						
	Monthly joint meetings with program re shared strategies (tour companies, 10 th)						
	Event date and location by Jan 31						
	5 corporate sponsors						

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	10 host committee members (VIP guests who lend name, buy a ticket; some also sponsor) enlisted by Feb 15						
	20 host committee members by May 31						
	Program and speakers by May 31						
	150 RSVPs by 2 weeks out						
	Processes in Place						
	Donor acknowledgment						
	Meeting Prep						
	All call reports filed						
	Top 50						
	Board 1:1s						
	Events						
	Donor acquisition						
	Meet with program re tour companies						
	Strategy to cultivate						
	Outreach to lodges						
	First tour						
	Evaluate and refine						
	Plan for 2010-2021						

Appendices

State of Play

The organization is entering its second decade and has built a successful track record of program delivery. Fundraising by the organization has helped sustain the school, providing approximately 60% of the annual budget.

Recent fundraising results have dropped since 2015 but were bolstered by a successful gala in Fall 2018 led by the board. Gift acknowledgment and tracking can be inconsistent and some donor communications have been missed.

Donor acquisition and retention and growth of fundraising results are a concern. Staff feel stretched thin and the board has expressed concern about founder burnout and sustainability of current fundraising results.

The organization is in the long process of transitioning from a founder-led, startup organization to an established non-profit with the founders growing into executive leadership roles.

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In 2019 the organization will celebrate its 10th anniversary. Co-Founder is lead fundraiser. There is a base of over 125 donors who have given \$1,000 or more per year and a dedicated and engaged board.

Key Challenges

- Lack of sustainability of fundraising results.
- Founders stretched too thin.
- Lack of systems and checklists/things falling through the cracks.
- Lack of focus on getting donor meetings.
- Crisis-driven, reactive through recent challenges at times.
- Weak prospect pipeline.
- Can success of 2018 event be repeated.
- Lack of operating reserves.

Key opportunities:

- Entering a period of stability after much change and loss.
- Leaders are inspiring and trustworthy and attract others. High fundraising IQ, commitment to learn and grow.
- Broad base of major donors.
- Compelling mission. The education of girls resonates strongly with philanthropists.
- 10-year track record of program results. The organization has shown proof of concept and is here to stay.
- Many excellent fundraising practices in place, 100% board giving, and sound and transparent financial accounting.

Culture of Philanthropy

Guiding Principles

Focus on the donor perspective

No two donors are exactly alike. Honor each person and each gift.

Approach decisions with the frame, "How will this serve our major donors?"

Maintain highest levels of integrity and confidentiality around private donor information.

Build direct, meaningful donor relationships

Prioritize work that deepens donor relationships (calls, emails, meetings.)

Seek feedback from donors on what matters most to you and to them. Be prepared to adjust course.

Write, call, and message personally and warmly.

Ask donors for partnership and advice, not only money.

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Collaborate and be forward-looking

“Everyone is a fundraiser.”

Foster multiple relationships with each donor.

Share real-time information and updates on donor contacts.

Celebrate successes and credit widely.

Create joy and energy around funding the girls.

Be results-oriented and strategic

Be a responsible steward of limited resources by focusing on major donors.

Learn and grow continually.

Share disappointments and mistakes openly as a team.

Identify lead staff/board person for every major workstream and expect accountability.

Track results to foster joint accountability with the board.

Processes/checklists

Donor acknowledgment

1. Handwritten thank you note all donors as gifts arrive (don't wait to send the tax letter.)
2. Send the tax letter within 3 days.
3. Reconcile monthly.
4. Friday board thank you calls to \$1,000+.
5. Thank you video in January.

Meeting prep, in meeting, and follow up

1. Decide on the team that will meet with the donor.
2. Set a goal for the meeting, include development (update, stewardship of past gift, groundwork for an ask.)
3. Set a meeting at the donor's convenience (time and location.)
4. Day before: share an agenda, informal note the day before confirming and listing the topics you want to discuss.
5. Be early to the meeting!
6. At the start of the meeting: confirm the time you both have for the meeting and the agenda topics you shared, e.g. catch up, share an organizational update on specific areas of donor interest, ask advice on X, discuss giving. Always include an ask, either money or advice. Rehearse the “ask” in advance with a colleague or board member as needed.
7. Be sure you get to the development topic!
8. At the end of the meeting: summarize what was discussed/agreed upon and any action items.
9. After within 12-24 hours:
 - a. Send a thank you recapping what was discussed.
 - b. Write a call report and file in the database.
 - c. Add to do items to task list and complete quickly.

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- d. Update board members.

Call Reports

1. Include attendees, date, purpose of meeting.
2. Three sections:
 - a. Write a 2-sentence summary of the highlights and any gift news.
 - b. List action items starting with “send thank you and write call report.”
 - c. Include a longer summary with further insights and details.
3. File in the database and share with founders and chair and others.
4. Review past call reports before future meetings.

Board Member Process with their Contacts

1. Make a plan for your development work in 2019 and share with Phil.
2. Strategize with CEO twice a year about contacts and development strategy.
3. Share new names with staff, make a plan.
4. Send thank you email or note to contacts when gift received. Staff to prompt.
5. Forward emails, newsletters, invitations, and social media to your contacts.

Donor cultivation – Top 50 sheet

1. Build spreadsheet with all non-event donors of \$1,000+.
2. Make a plan for 4+ contacts throughout the year.
3. Track each contact.
4. Review and update sheet at least weekly with fundraising team.
5. Add and drop prospects as needed.

Board member 1:1s at least twice a year

1. Follow checklist for “Meeting Prep”, treat the board as you would any top donor.

In meeting...

2. Review plan for the organization.
3. Review board role, board member plan and development.
4. Confirm giving, timing of ask, pledges etc.
5. Brainstorm one key question facing CEO around strategy, program, comms, fundraising, or finance.
6. Ask for board leads and prospect leads/review board prospect list.
7. Follow up with thank you, action items, and write call report.

Major Events

1. Set date and location 9 months in advance.
2. Engage small planning group to create a program that is emotionally compelling and has a dramatic arc.
3. Limit program speakers; priority on youth, alumni, non-traditional voices.
4. Choose speakers with care, must be uniquely capable of reaching audience.
5. Recruit larger host committee of 20 people (lend name, attend, no other expectations.)
6. Host an intimate “planning” wine and cheese in a private home to thank and engage host committee.

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7. Consider no auctions, just fund the need, sponsors, and tables/tickets.
8. Fly students in to attend and speak at the event and at the host committee kick off if possible.

Small Donor Events

1. Start with a donor in mind, ask them to host.
2. Build the event around donors, meet them where they are.
3. Must be low cost and high impact.
4. Board can lead with minimal staff.
5. Founder must attend and speak.

New donor research

1. For new names, use Google and Foundation Center Form 990s to estimate giving capacity (low, medium, high.)
2. For existing names, use publicly available resources to write a brief bio with wealth indicators and donor interests and other non-profit board roles.