



2018 Fund Development Plan

Achieving the Alliance's mission and sustaining an effective organization over the long term requires an annual Fund Development Plan which ensures reliable streams of income and organizational financial health. To be successful in its fund development efforts, the Alliance must support a culture of philanthropy where fund development responsibilities are shared across the entire organization by all staff and Board members and where all can articulate a case for support and play a role in helping to acquire resources needed (not just money) to do the Alliance's work. Fund development activities include networking, making connections, and fostering relationships especially at the regional and local levels.

Our 2018 Plan is built on past successes and lessons learned over the previous 5 years. The Plan provides a clear course of actions for all Alliance staff and Board to work on together in the year ahead. It will take the efforts of the entire Alliance organization, including all Staff and Board members, to ensure this plan's success including raising the needed funds to support our mission and our work. Staff training will be held at the 2018 Alliance Spring Staff Retreat.

The Alliance's 2018 Draft Budget lists \$6,545,116 projected total income which includes \$5,619,482 grants and program income and program sponsorships and \$235,000 unrestricted funds raised through events (\$125,000) and donations (\$110,000). In addition, the 2018 Budget reflects \$126,111 as an opportunity to raise additional unrestricted funds towards operating expenses. In 2017, the Alliance was funded approximately 47% federal, 10% state, 18% local government, 16% foundation, 9% corporate/private and 0.29% through small donations. Due to many unknowns surrounding federal funding, and to improve its overall financial health and stability, the Alliance will be focused on significantly increasing unrestricted revenue sources in 2018. The Board Finance Committee is also currently undertaking a due diligence process on how to establish a permanent "Operating Reserve" for the Alliance and will bring a proposal to the Board for adoption at the July 2018 meeting.

For the 2018 Fund Development Plan, eight (8) strategies have been identified. This plan outlines each strategy and includes a set of feasible goals, clear action steps, timeline, and estimated costs. The leadership and the support for each strategy is designated as Board or staff, so responsibilities are shared and mutually supported. Training will also be provided so that all are comfortable and capable of meeting expectations. A Communications Plan has been set to support this Development Plan including consistent branding and messaging, and storytelling to increase visibility, understanding and support for our work. In 2018, we will also continue to expand our Salesforce capabilities and increase staff training.

The Board Development Committee and the Alliance Director of Development will ensure that:

- actions identified are taken by those so designated.
- fund development momentum is maintained throughout the year.
- progress is evaluated and adjustments to the plan are made as needed.
- progress will be tracked including dashboards and reported on monthly by the Alliance Development Director to Development Chair and Executive Director and to the Staff.

At each Board meeting, the Board Development Committee Chair and the Alliance Director of Development will report on the progress of this fund development plan.

Beyond these strategies, we remain open to evaluating new and innovative ideas that Board or Staff may have to add to our unrestricted fundraising plan.

2018 Fund Development Strategies:

- 1. Board Giving** – As leadership, all current Board members should make 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 support Events strategy listed below). All gift donations (except Taste sponsorships) are anonymous (known only to Board Chair/Alliance leadership) unless stated otherwise by the Board member. In 2017, Board giving was 100% and totaled \$13,080 not including “Taste” sponsorships. In 2016, Board giving was 86% and totaled \$7,000.

2018 Goals: 100% of all Board members; total Board personal gift giving = \$20,000

Action Steps: Led by Board Development Chair; Supported by Alliance Development Team

- a. January Board Meeting: Board Chair and Development Committee Chair launch Board Giving campaign.
- b. Board Members submit Pledge Cards – due no later than April 2018 Board Meeting
- c. Board Members fulfill pledges no later than December 31, 2018
- d. Gift acknowledgment made by Board Chair, Alliance Development Staff generates

Timeline: Launch in January; pledge cards due by April; payment reminders throughout the year by Development Committee Chair, all donations to be received by December 31, 2018.

Costs: Indirect: Minimal Alliance Staff time
Direct: Printing of pledge cards

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- 2. Major Donor Leadership Giving Circle** - A Major Gift to the Alliance is \$1000 and higher. These gifts are acquired through a process of Identification, Cultivation, Asking and Thanking. Typically, the larger the gift, the longer the cultivation period. All Board members and Alliance staff may take part in this process of identifying, cultivating, asking and thanking. At the appropriate time, only a select few Alliance Staff and Board will do the actual solicitation of a major gift request in an in-person setting. A team of two works best. In 2017, the Alliance received 10 major gifts from individual donors ranging from 1,000-\$2,500 totaling \$11,500 (not including Board gifts and Taste sponsorships.)

2018 Goals: \$30,000 in Major Gifts
 20 major donor in-person visits for the year
 Build relationships with 3 new potential donors through each State Office.

Action Steps: Executive Director, Board Chair, Alliance State Directors, Development Director, Development Committee Chair serve as leads; Supported by Board Members, Honorary Directors, and Alliance staff

- a. Develop the details and benefits for Major Donor Leadership Circle and add information to website as well as other Alliance communications.
- b. Create a Case for Support as well as clearer regional messages, stories, and impact results
- c. Review ACB database and compile list of potential major donors (including longtime supporters and those who may be interested in Legacy Planned Giving).
- d. State Offices to identify at least 3 potential new Major Donors.
- e. Segment full potential 2018 Major Donor list by region/state office.
- f. Identify solicitation team for each Major Donor including appropriate Board and Staff.
- g. Evaluate best ways to customize the approach for engagement with each individual donor including personal visits with ED and Director of Development and other appropriate Staff.
- h. Extend Special Invitations to potential Major Donors to regional events to begin cultivation process.
- i. Meet one-on-one in person with all past and potential Major Donors.
- j. Ask Donors to consider monthly giving, and ask current major donors to consider an upgrade in annual support (identify specific needs and reasons why this is critical)
- k. Ask donors for other potential contacts and ask each to consider peer to peer outreach.
- l. Development Committee recruit Board members to host cultivation events when appropriate.
- m. Provide Staff with fund development outreach training session at staff retreat and develop general talking points and PowerPoint presentation for use for outreach.
- n. Track all conversations in Salesforce.
- o. Maintain regular communications with Major Donors – phone calls, personal notes, etc.
- p. Consider opportunities for Major Donor recognition: Annual Report, Special Event

Timeline: Schedule Monthly Visits (average one a month) and provide monthly updates

Costs: Indirect: Staff time

 Direct: Some travel and cultivation event expenses

3. Events – The major Alliance fundraising event is the *Taste of the Chesapeake*. In addition in 2018, the Alliance, each state office will coordinate and/or participate in one major regional event to raise Alliance visibility and expand its Salesforce contact list. Each state office will also coordinate a *Project Clean Stream* event with its own staff and invite local businesses and community members to join in. The Annapolis office will also host additional *Project Clean Stream* event with B4B members and B4B partners. Events should be evaluated from the point of view of input (time and money) and output (funds raised, increased exposure, new donors, new volunteers, and cultivation of friends). Each event must have a written budget and a set of specific goals including a net financial goal. In 2017, the Alliance raised over \$131,000 at the *Taste* including 71 sponsorships.

2018 Goals: Taste Gross \$150K, net \$130K, Taste Sponsors = 90
Each State Office: One regional event to net \$10K minimum = Total \$30K net
Each State Office: Participate in 24-hour Day of Giving through local Community Foundation
Double Salesforce contact list to 16,000 names through events and outreach
Use SignUp Sheets at ALL Events including workshops and sponsored events, etc.

Action Steps: Led by Development Team, State Directors and Ad hoc committees including Board, Honorary Directors, Alliance Staff and volunteers; Supported by all Staff and Board

- a. Set a feasible event schedule for the year.
- b. Sponsor and/or attend local events including tabling and gather contact information for all attendees.
- c. Present and/or attend workshops, webinars, etc and collect all attendee contact info.
- d. For each event - determine budget, timeline and the net fundraising and organizational goals.
- e. Establish an ad hoc committee for each major event
- f. All major events should have a lead and a designated Ad hoc committee defined to work on sponsorships, planning and logistics and to recruit additional volunteers to assist with event efforts.
- g. Ensure all contact information is gathered for all event attendees including sign up sheets, wufoo forms, etc. for PCS volunteers, Reduce Your Stormwater, RiverSmart and RiverWise Program participants, Forum and ForumPlus attendees and other workshop and event participants as appropriate. All info should be input into Salesforce .
- h. Regional events should engage new partnership and sponsorship opportunities to expand regional support including with sports groups and clubs, marinas, garden clubs, realtors, yacht clubs.
- i. The Board Development Committee with Alliance Staff should evaluate the “success” of the event.

Timeline: Taste of the Chesapeake – September 13, 2018 – Annapolis, MD
Back to the Bay – June – Richmond
Water Week – June – Pennsylvania
DC Event - TBD
PCS Events – each State – April – June including an MD B4B event.
Other: Staff Speaking engagements, fishing trips, Triathlon (Hike, Bike, Kayak), Golf tournament, Film Showing, Workshops

Costs: Indirect: Staff time
Direct: Actual Event expenses offset by sponsorships and donations

4. Appeals - There are two major Alliance appeals per year – one at mid-year (MYA) (May-June) and one at end of year (EOY) in early November. In addition, Membership appeal letters are sent in the 1Q and 3Q to a unique group of about 100 long-time donors that considers themselves Alliance Members. Lapsed donor letters are sent to all donors who have not donated at any time over the past 3 years. The MYA and EOY appeals are sent to all donors via mail, email and through our newsletter and social media. The hard copy appeals mailings are made as personal as possible - such as acknowledgement of past giving and include an inside note from Executive Director, Staff and/or Board members. In 2017, the Alliance raised approximately \$41,721 through its appeals. Current donor communication lists includes our 1612 donor mailing list and our 5,000+ MailChimp email list.

2018 Goals: Raise \$50,000 through Appeals
Rally 100 new donors
Expand Monthly Giving Circle to 50 donors with auto annual renewal
Increase Current Individual Donor Giving by 10%
Expand Communications throughout the year with impact reports to grow support

Action Steps: Led by Alliance Staff; supported by Board

- a. **Identify a Match Gift for Giving Tuesday, Annual Appeal and/or Unique Regional Campaign.**
- b. Encourage current donors to share our messages and help us reach new audiences including peer-to peer.
- c. Pay for Facebook ads to share our stories with larger audience
- d. Expand social media reach
- e. Design and mail appeals, letters and add personalized notes
- f. Develop and implement communication plan to support appeals
- g. Promote Monthly Giving sign ups with goal of 50 monthly givers. NOTE: A monthly donation of \$84 will make the donor a member of our Major Donor Circle
- h. Promote increased giving by 10% for all donors through communications.
- i. Track and thank donors
- j. Make phone calls and send personal thank you notes for donations.
- k. Host a Donor Thank You event through each State Office such as a film showing

Timeline: Mid-Year Appeal in late Spring, End of Year Appeal in early November (including PAGAve and Giving Tuesday),
Membership and lapsed donor letter mailings 1Q and 3Q

Costs: Indirect: Staff time to develop and create appeals and coordinate mailings
Direct: Mailing Printing, postage, – approximately \$1.00 - \$1.50/piece

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- 5. Business/Corporations** - Corporations and businesses donate to the Alliance to support their sustainability and social responsibility goals in their community and to further their corporate mission. When the Alliance can identify and merge businesses and corporation goals with our mission and specific Alliance programs and projects, there is a great potential for meaningful and impactful partnerships.

This strategy calls for unique conversations with specific corporations and a targeted followup solicitation for support based on corporate interests and priorities. Currently, the Alliance approaches this audience through Board contacts and programs such as Business for the Bay (B4B) and Project Clean Stream (PCS); both can be high visibility opportunities for businesses to become initially engaged with the Alliance. B4B should be integrated into all Alliance business relationships.

The Alliance should also identify other specific programs projects that Corporate Partners may wish to sponsor or support including support for a year-round staff person), the Chesapeake Monitoring Cooperative and projects such as pollinator garden installations, green infrastructure projects, tree plantings, local stream restorations, the READY program, rain gardens, and other State priorities and initiatives for future support by corporations.

In 2018, the Alliance raised \$100,000 in sponsorship support from corporations or business for B4B and Project Clean Stream, in addition to corporate grants for specific regional projects.

2018 Goals: \$200,000 corporate sponsorship support
 15 in-person solicitations for the year including 2-4 new corporations per state office
 Multi-year support for programs and projects

Steps to be taken: Led by Alliance State Directors, Development Team and Executive Director;
Supported by Board and Alliance Staff

- a. State directors, Alliance Staff and Board members identify potential business/corporate donors
- b. Board members open doors to corporate leadership and corporate support
- c. Acquire contact info for corporate employees who participate in Alliance activities such as PCS and work with them to introduce Alliance to corporations.
- d. Research benefits to each corporation for their support of the Alliance (including employee volunteerism, sustainability goals, impact achieved, positive perceptions)
- e. Answer the question “How does the gift/support from the corporation benefit the corporation?” and develop appropriate materials in advance of corporate outreach
- f. Schedule meetings to discuss interests and match Alliance program and projects.
- g. Invite corporate and business employees to participate in PCS event.
- h. Provide outreach training for State directors, Staff and Board members as needed.

Timeline: Year round

Costs: Indirect: Staff time
Direct: travel and other cultivation expenses

6. Workplace Giving – This strategy allows government employees and employees of participating private corporations to donate through payroll deductions to the Alliance. The Alliance registers annually for each workplace campaign. Workplace giving is promoted on the Alliance website, on social media, newsletter, and by participating in hosted events where the Alliance can have an informational table at campaign fairs on site at various workplaces in the autumn each year. Payments come to the Alliance after a long lead time in the next year. The Alliance is currently registered as a recipient of these donations through EarthShare, MD Charity, PA State, VA State and the Combined Federal Campaign.

2018 Goals: \$15,000 a year

Identify and Participate in Regional Workplace Giving Campaigns and attend Fairs
Coordinate volunteers through all State offices to attend Workplace Campaign fairs

Steps to be taken: Led by Alliance Development staff, supported by Alliance staff, volunteers

- a. File necessary paperwork annually to continue to be a recipient of EarthShare, Combined Federal Campaign, MD, PA, VA State Campaigns.
- b. Promote Workplace Giving through Alliance communications.
- c. Attend campaign events throughout the year.
- d. Recruit and train a corps of volunteers through all 3 state offices to man the Alliance table when invited to attend these events; State directors and their staffs to recruit volunteers
- e. Insert the workplace giving code in all Alliance materials and online and in all communications on social media
- f. Thank donors as appropriate to rules of the campaigns

Timeline: Throughout the year (primarily August through February)

Costs: Indirect: Staff time
Direct: Travel, exhibit expenses

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7. **Foundation Grants** – Most foundation grants are restricted to programmatic work. In 2018, the Alliance will search for and develop relationships with private foundations, especially regional family foundations, that do not accept unsolicited proposals.

2018 Goals: 1-3 grants totaling \$10,000-\$30,000

Steps to be taken: Led by State Directors, Executive Director and Alliance Development Team, supported by Alliance Starr, Board Development Committee and Board

- a. Identify specific foundations
- b. Board makes intros where possible
- c. Build relationships in 2018
- d. Alliance Staff submits proposals including Forests, ForumPlus, PCS, CMC, and specific local projects identified by State offices that fit foundation priorities

Timeline: Year round; deadlines vary

Costs: Indirect: Staff time
Direct: little, possible meetings

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8. **Planned Giving: 2019 Launch** – A planned giving program will cultivate donors to consider legacy 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 continue to be explored in 2018 with a goal to launch a structured Planned Giving Campaign in 2019. It will require the services of a third-party Planned Giving expert to work with donors. These gifts are not part of the budgeted revenue for the Alliance, as they are difficult to project and often unknown.

2018 Goals: From a Board Sub-Committee to lead this effort
Retain a Planned Giving expert
Incorporate Planned Giving information into conversations with Major Donors
Update bequest language to all Alliance printed materials and website
Plan to launch this strategy in 2019

Steps to be taken: Led by Board Sub-Committee, Supported by Alliance Development Staff

- a. Determine specs for a 3rd party expert including knowledge about conservation easements
- b. 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; Consult with Craig Highfield re: Estate Planning for Forests workshops
- c. Alliance Staff to develop an informational brochure and other communications.
- d. Update Planned Giving on website and all other appropriate Alliance communications.
- e. Alliance Staff to compile a list of prospects for planned giving outreach.
- f. Make thank you calls to older donors and long-time donors, etc. to start cultivation
- g. Organize a planned giving information event for donors for 2019.

Timeline: Set a due date for each of the above steps above throughout 2018

Cost: Indirect: Staff time
Direct: Costs to produce promotional materials
