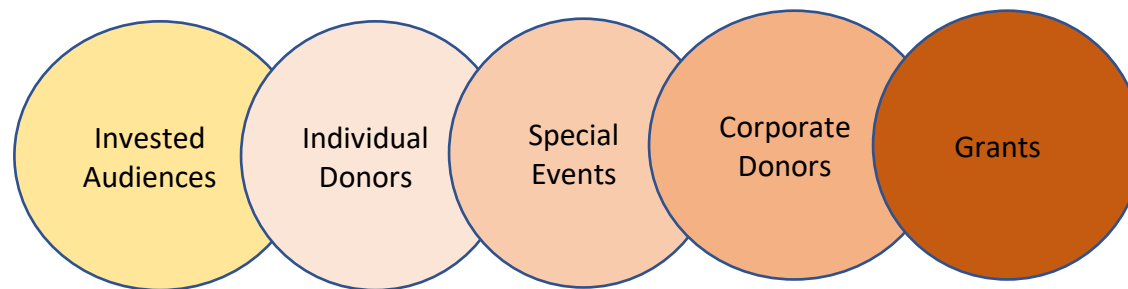
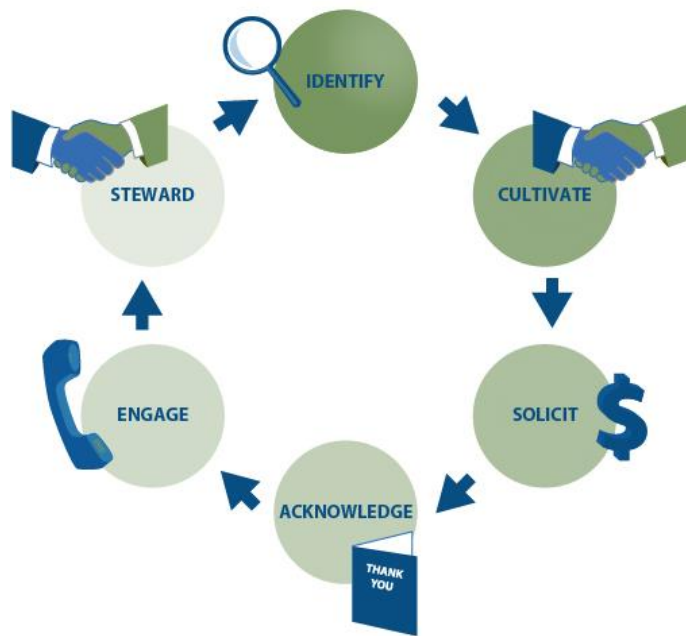


Development Plan Template Based on FY July 1 - June 30th

All aspects of the fundraising pipeline, process and pyramid are functioning at their highest capacity to ensure all projects, programs and initiatives are properly funded and the future of the Institute is secured. Audiences are clearly defined and communication messages and vehicles are on brand, segmented and strategically planned to achieve desired outcomes. Communications and marketing efforts elevate the status of XX organization, support its fundraising efforts and drive event attendance.



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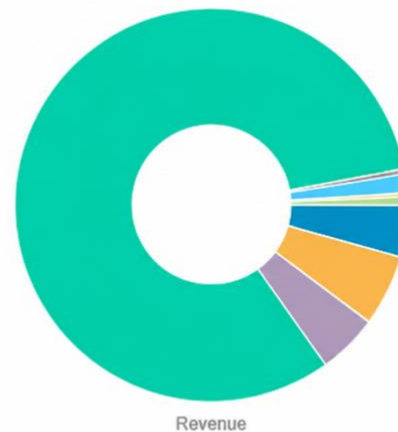
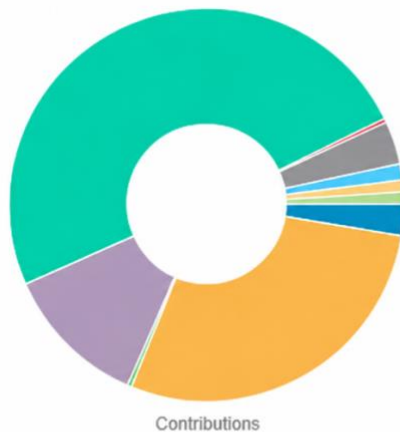


Development Plan Outline

Some Trends:

- Average contribution size was FY3 \$1,621; FY2 \$2,237; FY1 \$2,301 (does not include grants)
 - Number of gifts FY3 was 311; FY2 was 234; FY1 was 235 (does not include grants, but does include event donors)
 - Donor retention in FY3 was 52%; FY2 was 51%; FY1 was 49% (does not include grants)
 - FY3 Gifts and Revenue by Constituent Code graphics below –
- Revenue stream unbalanced with a large portion coming from Grants funding which if lost, could have a catastrophic effect on the future of the organization/programs

Contributions by constituent type 



Board Member Friend Member Alumni Organization Recipient
Staff Member Supporter Vendor Volunteer

Overall Development Goals:

1. Win more donors and diversify revenue stream

Goal: Acquire 50 new supporters by FY End

Strategies:

- Increase community engagement by attending 2 networking events each month. Targeted groups include: Women's Networking Group and Chambers of Commerce (ED and FM) (October – June)
- Create list of 10 new corporate prospects (ED and Board) (Dec. – June)

2. Lift the performance of current donors

Goal: Make 10 Thank You Actions, 7 Discovery Actions per month. End result: increase of average gift size by 10%

Strategies:

- Implement stewardship plan with result of 10 Thank You actions per month (phone calls or HWN) in addition make 7 Discovery Calls per month to learn more about our supporters (who they are, why they give, learn more about the organization/program etc.)
- Establish a book of business for Executive Director and Foundation Manager of top 20 prospects each. Add 10 new prospects to book per quarter. (October. – June)
 - Have a written Moves Management Strategy for top donors to convert to or an overall gift increase of 10%:
 - Major Gifts
 - Individual Donors
 - Monthly Giving
 - Planned Gifts
 - Capital Campaign donors
 - Have stewardship strategy for donor segments (Appendix A/B)
 - Major Donors
 - Special Events Donors
 - Grateful Families/Patients
 - **New Donors**
 - Donors by Level
 - Donors >\$250
 - \$250+
 - \$500+
 - \$1,000+
 - \$2,500+
 - \$5,000+

3. Keep more of the donors we currently have

Goal: Improve donor retention rate by 5%

- Donors (goal: keep 57% of FY donors).
- Begin working on 1st time donors - Baseline

Strategies:

- Implement quarterly Thank-a-thons for staff and volunteers.
- Improve donor record integrity to have valid phone numbers and emails for 70% of active donor records by FY End. **FYXX - 84% of active records do not have email/phone/both.** Establish a standard for organization/corporation accounts and use relationships versus constituent record contact information.
- Create a 60-day post-gift donor impact statement (infographic) to share via email or postcard. The goal is to send within 1 week of the 60-day post-gift date.
- Implement a volunteer pipeline and workflow strategy to utilize community connections that did not pass a wealth screening threshold.

Financial Goals:

Objectives and Strategies

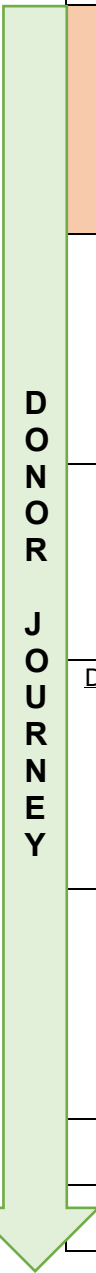
1. Maintain donor and prospect records in an efficient, organized, and timely manner to achieve complete coordination of the organization's fundraising activities and improve donor relations.
 - By August review and update Workflows for all contributions (FM)
 - By September establish an organization-wide SOP for Constant Contact lists, clean data rules, etc. (FM with other depts)
 - By October have a written procedure and calendar for upkeep and maintenance (duplicates, emails, address changes, etc)
2. Strengthen the brand of Gala and Social Party to achieve revenue goals
 - Gala to be held in September 202X (see separate planning calendar and timeline)
 - Social Party to be held in April 202X (see separate planning calendar and timeline)
 - Explore ways to monetize programming and/or create lower-level events to achieve funding shortfall in the SE area.
3. Secure \$XX in Annual Fund through digital appeals and campaigns
 - Grateful Families and Patients Programs (Year-round)
 - Create and execute Project Plan
 - Year End (November/December), End of FY (April/May)
 - Create multiprong approaches to campaigns utilizing traditional, online and social methods for maximum reach and exposure.
 - Identify Prospects through Discovery Calls process (FS) – see Discovery Calls Workflow in I Drive for details.
 - Create a Prospect Checklist and Moves Management cycle for those who qualify (FM)
4. Launch a Major Gifts Initiative using the moves management method to create a strong donor pipeline for future projects and events
 - Establish a book of business for ED and FM of the top 20 prospects each. Add 10 new prospects to book per quarter. (Jan/April/July/October)
 - Have a written Moves Management Strategy with a workflow/ calendar of touch points for top donors to convert to or an overall gift increase of 10%
 - Capitalize on technology to manage donors in Raiser's Edge and iWave for more effective and efficient donor relations
 - See Appendix A
5. Launch Comprehensive Campaign/Endowment Offering
 - Run a wealth screening on current database and/or of top prospects – See Discovery Calls Workflow for details.
 - Establish campaign goals and milestones

Development & Marketing Activities:

	<u>Grants</u> Monthly Reports: List Those Here:	<u>Special Events/Programs</u>	<u>Individual Donors</u> (Monthly Giving, Direct Mail, Email Appeal, Digital Campaigns)	<u>Major Giving Donors</u> (\$2,500+)	<u>Communications</u> (newsletter, website, annual report, etc.)	<u>Special Projects</u> -Capital Project	<u>Industry Holidays/ Campaigns</u> https://www.petsit.com/2026-pet-holidays
July	Major Hospital System Insurance Company	Back to School Event	Giving Summaries for previous year monthly donors		Quarterly Donor Newsletter		Dry Eye Awareness Month
August		Donation Celebration		Somerville Trust			National Eye Exam Month Children's Eye Health and Safety Month Contact Lens Health Week
Sept		Gala (9/14)					Healthy Aging Month Sports Eye Safety Month
Oct					Quarterly Donor Newsletter		World Sight Day Eye Injury Prevention Month World Smile Day
Nov		AHP Conference (List City)	End of Year Campaign				Diabetic Eye Disease Awareness Month
Dec		Holiday Mission Event	Giving Tuesday End of Year Appeal End of Year Online Efforts	Boyes Trust			Gift of Sight Month Giving Tuesday National Gratitude Month

	<u>Grants</u> Monthly Reports: List Those Here:	<u>Special Events/Programs</u>	<u>Individual Donors</u> (Monthly Giving, Direct Mail, Email Appeal, Digital Campaigns)	<u>Major Giving Donors</u> (\$2,500+)	<u>Communications</u> (newsletter, website, annual report, etc.)	<u>Special Projects</u> -Capital Project	<u>Industry Holidays/ Campaigns</u> https://www.petsit.com/2026-pet-holidays
Jan	Demarco	Bowl Game Neighborhood Festival	Monthly Donor (Start of year)	Baird	Quarterly Donor Newsletter / Annual Impact Report Statement		World Braille Day Glaucoma Awareness Month
Feb	Vanderbilt Essex Renaissance	Charity Polo Classic /Gala Committee Meetings Start (Monthly)					Age-related Macular Degeneration / Low vision Awareness Month
March	Community Foundation	Virtual Event	Monthly Donor Reminder		Gala Save the Date Eblast		Workplace Eye Wellness Month
April		Social Fundraising Event AFP ICON (Seattle)			Quarterly Donor Newsletter		Donate Life Month / Women's Eye Health and Safety Month
May		Partner/Stakeholder Convention (Orlando)	End of FY Campaign	Wheeler Keller-Williams	Gala Invitations		Inherited Retinal Disease Genetic Testing Month
June	Rotary Clubs GEICO		End of FY Online Continues		Summer Projects Sharing		Cataract Awareness Month

Donor Book of Business Strategies – Appendix A



	<u>Individuals</u>	<u>Foundations</u>	<u>Corporations</u>	<u>Grateful Patient Program</u>
<u>Goals</u>	Increase contributions from Individuals projected by the following NOTE: Individuals can be further parsed based on giving levels	Increase grant funding received from foundations (corporate, family, private, community) by doing the following	Increase contributions from corporations and businesses to over the projected goals by doing the following	Build and implement a Grateful Patient Program to over the projected goals by doing the following
<u>Identify Prospects</u>	- Build portfolio of donors based on current database - Identify 10 prospects per Quarter outside of current donor pool (If we could only get...)	Identify Top 10 Foundation prospects with funding priorities aligned with mission	Identify Top 25 Corporations/Prospects with funding priorities aligned with mission (use Book of Lists)	Identify Top 5 prospects for Grateful Patient Program
<u>Create Interest in Mission</u>	- Develop Case for Support and Elevator Pitch - Develop Menu of Funding Opportunities - Invite to Informational Meetings/Tours	- Share Annual Report - Share Case Statement that Matches Interest - Invite to Informational Meetings/Tours	- Send Quarterly Electronic Newsletter - Share Annual Report - Invite to Informational Meetings/Tours	Send Monthly Grateful Patient Program Email (last Wednesday of Month)
<u>Discover Donor Motivations</u>	- Have 8 meaningful contacts per month from top prospects - Make 20 thank you calls per month – invite to call back to learn about impact	1 meaningful contacts per month with foundation decision makers	Have 2 meaningful contacts per month from top prospects	- Have 4 meaningful contacts per month from top prospects - Make 10 thank you calls per month – invite to call back to learn about impact
<u>Engage Passions</u>	- Send a quarterly impact report based on intertest and donor segmentation - Send articles of interest as they arise	- Send a quarterly impact report based on intertest and donor segmentation - Send articles of interest as they arise	- Send a quarterly impact report based on intertest and donor segmentation - Send articles of interest as they arise - Find ways to engage employees	- Send a quarterly impact report based on intertest and donor segmentation - Send articles of interest as they arise
<u>Ask for Support</u>	Set ask goals for top prospects	Set ask goals for top prospects	Set ask goals for top prospects	Set ask goals for top prospects
<u>Recognize</u>	Follow plan based on segment	Follow plan based on segment	Follow plan based on segment	Follow plan based on segment

Donor Stewardship - Appendix B

Have stewardship strategy for donor segments – Year 1 focus on saying thanks

*Need to use Raiser's Edge to create and automate processes

Thank you process – this is in addition to the tax-receipt/thank you

- Major Donors (\$2500+)
 - Donor receives phone call from Board Chair/ED within 3 days of gift/pledge
 - Donor receives handwritten thank you from the Thank You Brigade within month
 - FM or gift solicitor designs impact reporting and other stewardship milestones.
 - Gala Donors
 - \$10,000+ donors receive phone call from Board Chair/ED within 3 days of gift/pledge
 - \$5,000+ donors phone call from committee chair within 1 week of gift/pledge
 - Donor receives handwritten thank you from FM within month
 - Social Event Donors
 - \$10,000+ donors receive phone call from Board Chair/ED within 3 days of gift/pledge
 - \$5,000+ donors phone call from committee chair within 1 week of gift/pledge
 - Donor receives handwritten thank you from FM within month
 - New Donors (new donor list should be pulled 1 x per month)
 - 1st Welcome Series Email sent within 1 day
 - 2nd Welcome Series Email sent after 30 days
 - Donor receives personal thank you note from FM within 3 days of gift/pledge
- *Once per month, use new donor list and add email addresses to Constant Contact donor and newsletter list. (FS)
- Donors by Level (Workflows added in RE on 1/23, Implement on 2/1)
 - Donors >\$250 – thank you by FS within 3 days or within 5 days (HWN)
 - \$250+ - thank you by FM within 3 days (email) or within 5 days (HWN)
 - \$1000+ - thank you by ED within 3 days (email) or within 5 days (HWN)

Tax-Receipt/Thank You Correspondence

- Gift Received Type (How did we receive the gift?)
 - Digital (Through website, constant contact, etc.)
 - Tax-receipt/thank you should be digital only – through Raiser's Edge auto feature
 - Mail (Check)
 - Tax-receipt/thank you should be sent by mail
 - *If we received the check by mail and we have an email address in their constituent record, a digital email receipt should also be sent.