

Fundraising Plan  
2017 – 2019



Jennifer F. Unroe  
Alleghany Highlands YMCA

December 12, 2016

### Overview

The Alleghany Highlands YMCA was founded in 1993 as a non-profit 501(c)(3) organization. Initially, the YMCA operated out of the Covington Boys' Home facility but quickly outgrew its home and began a \$7 million capital campaign to construct a new facility to better meet the needs of the community.

Through the support of The Alleghany Foundation, local businesses and supporters of the YMCA, the Alleghany Highlands Y opened its first full-service facility in December, 2007. The building is a 37,000 square foot facility located in the Alleghany Regional Commerce Center. Amenities include a walking track, full court gym, full size indoor swimming pool, and a wellness center complete with cardiovascular machines, strength training equipment and a free weight section. Additionally, the Y offers land and water group exercise classes, child watch and fit kids for children ages 6 weeks to eleven years of age, swim lessons, swim team, specialty day camps, and teen and senior adult programs.

In May, 2012 the YMCA was able to close-out the capital debt due to \$269,327 in funding from The Alleghany Foundation. Completing payments on this obligation saved the YMCA \$1,600 per month solely in interest payments.

The Alleghany Highlands Y is well known for its early learning programs, which include the West Learning Center in Covington and Central Learning Center, now housed in the Mountain View Elementary School, that provide a range of day care options for infants, toddlers, and preschoolers. The Y works in partnership with the Alleghany County Public Schools and Head Start to provide free services for children at academic risk. The YMCA also provides afterschool care for school-age children in three locations. Through afterschool programs,

children receive homework assistance and participate in a variety of activities, including health and wellness, literacy, character development, and arts and humanities.

The mission of the Alleghany Highlands YMCA is to put Christian principles into practice through programs that build healthy spirit, mind and body for all. Our cause is to strengthen community.

The Y makes accessible the support and opportunities that empower people and communities to learn, grow and thrive. With a focus on youth development, healthy living and social responsibility, the Y nurtures the potential of every child and teen, improves the Alleghany Highlands community's health and well-being, and provides opportunities to give back and support neighbors.

Our organization's over-arching goals, as identified in a strategic planning work session with Y-USA Resource Director Barry Watkins on September 29, 2016 are to: 1) Improve the Health of the Community; 2) Reduce Chronic Disease/Prevent Obesity; and 3) Prepare Children Educationally.

A draft of this strategic/operational plan has been developed by staff for review by the Board of Directors at their February 23, 2017 meeting. At the same meeting, the fundraising plan will be presented for review.

## **Political, Economic, Socio-Cultural, Technological (PEST) Analysis**

### **Political**

On the federal level: 1) the upcoming overtime wage regulation will cripple the Y's ability to conduct programming and provide supervision of both the wellness facility and the early learning centers; 2) prior to implementation of the Affordable Health Care policy, the Y did not offer health insurance due to lack of employee interest and need, in addition to the Y's inability to fund the program; 3) funding from the federal government does not fully cover the Y's cost of providing services for Head Start.

Local governments are unable to provide funding for Y operations, although Covington provides free space for the West Learning Center (the Y pays a percentage of utilities). If the city's building is sold, the Y may be forced to find another home for the program even though The Alleghany Foundation funded the cost of building renovations for the Y's use.

### **Economic**

Population and business (rank 110 out of 134 counties for economic opportunity) declines, as evidenced by census counts over the past twenty years, continue to plague the Alleghany Highlands (Weldon Cooper Center for Public Service, 2015; 2016). It is uncommon to find such a new Y, the size of the Alleghany Highlands, with our community's trending population base. Y-USA Resource Director, Barry Watkins, notes that the national organization discouraged the inclusion of a pool in our facility due to the area's census and economic base. Yet the pool is one amenity that consistently draws members and visitors to the Y.

The Y requires documentation of income before the award of any financial assistance for member or early learning program fees. Assistance is provided on a sliding fee scale based on the

federal poverty level. Approximately 13% of Y memberships are subsidized at a discount of 20-70%, and of that 13%, 57% (78 membership units) receive 70% off of their membership fee. In the case of our early learning program, more than 90% of the students receive some form of financial assistance, whether from The Alleghany Foundation, Department of Social Services, Head Start, Early Head Start or Virginia Department of Education.

Not only does the financial assistance awarded by the Y significantly impact the revenue needed to offset expenses and savings, it also paints a dim picture of the income levels of Alleghany Highlands families who desire healthier lifestyles and quality care and education for their children.

Since the merger of MeadWestvaco and RockTenn, the new WestRock Corporation that previously awarded a significant amount of support through each local division and company foundation, the Y experienced noticeable impact (See Market Analysis. Foundations). In addition to a reduction of funding on both the local and Richmond levels, MWV previously reimbursed employees \$20 per month for their Y membership if the employee checked in at least twice to the facility. This subsidy was eliminated with the merger and resulted the loss of 10-15 memberships to the Y (net effect \$7,000+ annually).

**Socio-Cultural.** According to the Virginia Department of Health, more than 1 in 3 of the state's adults have pre-diabetes and 15-30% of that segment will develop type 2 diabetes within five years. Currently, 1 out of 11 Virginians are diabetic. (Behavioral Risk Factor Surveillance Survey, 2013). Not only does this have implications for the Y's signature Diabetes Prevention Program, but it also indicates a need for youth and adults to develop long-term nutrition and exercise habits to reduce their risk of developing the disease.

The most used excuse of people who terminate their Y membership is the *lack of time* to utilize the facility. One would surmise that the abundance of marketing related to prevention of diabetes, cardio-vascular disease, cancer and obesity issues would move the public to action, but we do not necessarily find that to be the case. More often, we find that people are act only because of a healthcare crisis or rehabilitation need.

On a positive note, the Y has a very respectable national brand and is touted as a significant economic asset for the Alleghany Highlands. The community is also beginning to recognize the value of quality early childhood education and the Y's leadership in that area.

The Y's early learning program is strong, reputable and public school educators confirm that the Y does a great job of preparing children for the public school setting. It also assures families with limited income equal opportunity for a strong educational foundation for their children. Even so, there remains a perception in parts of the community that the Y's early learning program is only for poor, dysfunctional families and that the educational component is just a step above babysitting services.

**Technological.** In order to maintain all reporting requirements both to Y-USA and the federal and state governments, the Y must utilize operations and accounting software the makes life easier for staff but is very costly for the organization, around \$25,000 per year. Multiple building safety systems add significantly to operating costs.

### **Competitor Analysis**

Prior to a strategic planning exercise with the Y's board of directors, department heads met in August, 2016 to conduct a Competitor Analysis using a template provided by YMCA of the USA. Three types of competitors were identified: 1) Direct Competitor. Does what we do; has same or similar programs and services; same market; same geographic area; same

members/customers; 2) Substitutable Competitor. Meets the same needs as us but in a different way – i.e.: hospital rehab; nannies competing with child care program; and 3) Resource Competitor. Competes for resources our Y needs.

Staff identified the following direct competitors: Tanks Gym; local recreation departments; church preschool programs; high school athletics; and community “travel ball” programs.

Substitutable competitors included: community benefit runs/walks/events; in-home child care; independent personal trainers; hospital and rehab facilities; dance studios; local community college; state and federal parks; backyard pools and recreational waterways; businesses that conduct group exercise programs for staff or fee-based for the public, such as Merle Norman Cosmetics, Anything and Everything, Clifton Forge School of the Arts and dance studios.

Resource competitors was perhaps the longest list: Masonic Theatre and Bath County Community Hospital (recent capital campaigns); Arts and Crafts Center, Alleghany Highlands Arts Council, Clifton Forge Main Street and other Alleghany Foundation grantees; dance studios, schools and parent-teacher organizations that run fundraising campaigns.

Staff then narrowed the list to three major competitors: Tanks Gym in Covington, owned by the Garten family; Non-secular preschool programs; and Clifton Forge Revitalization.

Perhaps the most significant competition from the Tanks Gym lies in their admirable ability to provide free or reduced memberships for local police and other segments of the community. Time will tell if this business plan will generate enough revenue for long-term growth.

Non-secular half-day preschool programs in the Alleghany Highlands have great reputations and are appealing to families who want their child(ren) to have a quality experience

with less structured time before they enter public schools. Typically, these programs do not offer financial assistance.

The town of Clifton Forge is a remarkable example of what can happen when a community gathers its resources for the common good. Visual or performing arts are well supported, and volunteers with creative ideas seem to be more abundant. Marketing is cohesive even though organizations work with a shoe-string budget. Competition for volunteers, funding dollars and attendance, in the case of special events, is seen as the most significant competition between Clifton Forge organizations and the Y.

The full competitive analysis is attached (See Appendix A).

### **Collaborative Analysis**

There are a number of organizations and businesses with which the Y currently collaborates. On-site exercise classes are conducted periodically for WestRock employees (non-Y members pay a \$10 daily fee to participate). Both Lewis Gale – Alleghany and Ridgeline Therapy participate in a bridge program, to refer physical therapy graduates to the Y, allowing our staff to continue to assist where needed and provide the patient with a free, one month medical membership to the facility. The Y is also a member of the Community Alternatives for Positive Prevention coalition and shares information and other resources for issues affecting Alleghany Highlands' residents.

Potential collaborations include increased sharing of facilities with community groups and organizations, as well as joint fundraisers (i.e., area-wide Zumba-thon to benefit several organizations) or grant funded projects to collaboratively address a specific need.



### **Market Environment Analysis**

**Individuals.** Building on strategies suggested in this course, it is expected that the Y can increase individual giving beyond the 80<sup>+</sup> expected for 2016.

**Business/Corporations.** Giving from the WestRock Corporation is not expected to match that of MeadWestvaco due to seemingly philosophical differences in philanthropic giving. No other business in the Alleghany Highlands appears to be able to give to the Y at the same level of MWV. However, there is opportunity to build deeper relationships with corporations such as Lumos, Dominion Virginia Power, Shentel and other YMCA vendors.

**Grants.** The Virginia Department of Education funds the Virginia Preschool Initiative grant for counties and cities across the Commonwealth and is one that the Y receives each year in collaboration with Alleghany County Public Schools. While this grant supports preschool education for 45 four year-olds, a local match of \$50,000<sup>+</sup> must be acquired. The Alleghany Foundation typically provides matching funds (see below, Foundations).

Proof of collaborative efforts seems to be more critical than ever in order to attract grants of significance. To be competitive[JU1], the Y needs to have a clear vision of the issues it can, and should, address and then work diligently to establish the necessary partnerships and strategies to be ready when opportunities are announced. The timing of many grant announcements and submittal deadlines does not often allow a great deal of lead time to effectively establish new partnerships at the last moment.

**Foundations.** In 2015, the Y was able to develop a relationship with the Jeanne G. Hamilton and Lawson W. Hamilton, Jr. Foundation in West Virginia due to a connection between a Y aquatic participant and a Hamilton family member. Because there were no public indoor pools in the Lewisburg, White Sulphur or Union areas, about 3 percent of the Y's membership commuted to

the Y from West Virginia to swim and participate in water aerobics, and the ability to demonstrate medical benefits of water therapy enabled the Y to receive a \$10,000 grant in support of the aquatics program. The Hamilton family indicated a desire to continue their support of the program as additional funds become available.

Of course, the Y would not be in existence without the support of The Alleghany Foundation. Over the years, this foundation has provided more than \$8.3 million in support of facilities, programs and early learning program assistance. While we anticipate the foundation to be supportive of the Y in the many years ahead, the limitations of that support are in question. Prudence calls for the Y to search for ways to make financial assistance stretch further and to reach out to school systems and governing bodies to help fund their fair shares of local preschool education grants

There are two additional family foundations outside the region that the Y plans to approach within the next two months for funding of necessary upgrades to the workout facility. Proposals are currently being prepared.

### **Internal Analysis of Past/Current Fundraising Activities and Capabilities**

The Y's first annual campaign was conducted in 2012 with \$76,000 raised of the \$100,000 goal. The most successful campaign was conducted in 2015 when the \$98,000 goal was surpassed by \$2,300.

The Alleghany Foundation is in its fourth year of supporting the Y's annual campaign efforts with a dollar for dollar match up to \$50,000, leaving the Y to raise the remainder of the \$100,000 goal.

**Staff and board involvement.** Even though the importance of 100% board participation has been stressed, results have been less than desirable: 13 gifts from board members in 2015 (62%);

10 thus far in 2016; and an average gift both years of approximately \$370. Staff participation is very low, as the majority of positions are at, or just above, minimum wage and many struggle to make ends meet. Six percent of staff gave in 2015; three percent in 2016.

**Fundraisers.** A number of small fundraisers have been conducted, with the most successful a 31 Days of December raffle that nets approximately \$3,000, and a Yankee Candle sale by the early learning families that nets about \$2,000. The 2016 raffle will include an accompanying online auction of jewelry, handcrafted arts, and other items donated by merchants.

**Data.** Staff began using the fundraising component of Daxko Operations (our internal operating software) in 2015. Of note: 1) Eighty-two groups and individuals made donations in the 2015 and/or 2016 campaigns: 2) sixty-two individuals gave in 2015; 3) forty-one individuals gave in 2016 (exactly half of the 2015 donors have not yet made a 2016 contribution, yet we have 20 new donors thus far).

In 2016, seven donors increased their level of giving, and eight made no change. In 2015, 17% of the gifts were made in December. Eleven individuals make recurring contributions through bank drafts or payroll contributions

### **Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis**

#### **Strengths**

- Fantastic facility for the size of area; only full service facility for seniors and families.
- Positive member, community and staff relations
- Staff are nice, friendly ,committed to the mission and members, and work well together
- Only indoor pool around; appeals to West Virginia residents
- Facility maintenance has greatly improved, as well as the condition of the workout room.

- We offer good youth sports programs such as gymnastics, youth basketball and the swim team.
- Finances are greatly improved from five years prior and the Y is currently debt-free.

**Weaknesses**

- There is not enough time and resources to address all of our issues. We do not have a presence everywhere needed; understaffed in gym and wellness center.
- There are significant space constraints for programs that have the potential to grow our organization and provide value to both residents and the economic value of our community.
- We're doing the basics – not offering many things that other Ys offer.
- There is a lot of dead time in the aerobics room, gym and pool, and the multi-purpose and child watch areas are under-utilized during non-focused hours.
- We do not have a strong sense from within staff and the culture of members relative to policies, ethics of Y use and care (culture of disrespect of facility).

**Opportunities**

- We are working with Alleghany County Public Schools to begin to offer annual swim lessons for all second grade students. It is anticipated that this effort will grow the Y.

**Threats**

- Unknowns about federal or state minimum wage mandates, changes to the Affordable Care Act, and Department of Labor overtime regulations.
- The trickledown effect of potential labor strikes, business closings or relocations, and loss of funding from The Alleghany Foundation and WestRock.

## **Philanthropy Statement**

### **Key Planning Assumptions**

- Our Y must be actively working to nurture the potential of children and teens, improve the nation's health and well-being, and give back and support our neighbors.
- We believe that lasting personal and social change can only come about when members, participants, Y staff and the community all work together to make sure that everyone, regardless of age, income or background, has the opportunity to learn, grow and thrive.
- The Y counts on the generosity of our donors to help assure that no child, family or adult is turned away because of inability to pay.
- Donors support causes for which they have passion, so the Y's case for support must be linked to addressing real and compelling community needs.
- Donors can be assured that the Y will use their gifts to make a meaningful, enduring impact right in their own community.
- To help ensure our Y's long-term financial stability, it is important to implement a strategy to create and grow our YMCA endowment fund.

## **Fundraising Objectives**

### **Year 1: 2017**

1. Complete Strategic Plan for the organization.
2. Review and adopt a Three-Year Fundraising Plan for the organization.
3. Establish a philanthropic culture of fundraising that involves board, staff and volunteers.
4. Within the first quarter, develop a fundraising cultivation plan in collaboration with Y board/volunteer committee.
5. Through a combination of fundraising efforts, the Y will need to raise a) a minimum of \$100,000 in order to meet financial assistance, programmatic and operational needs of the main facility; b) a minimum of \$226,000 to support financial assistance and programmatic needs of the Early Learning Program.
6. Increase the number of recurring bank draft or payroll contributions by Y members and staff by 50%.
7. During the 2018 budget process, initiate a realistic plan to increase Capital Fund resources.

### **Year 2: 2018**

1. Establish a philanthropic culture of fundraising that involves board, staff and volunteers.
2. Review and update the organization's strategic plan.
3. Review and update the organization's fundraising plan.
4. Update fundraising cultivation plan in January, 2018.
5. Increase the number of recurring bank draft or payroll contributions by Y members and staff by 25%.

6. Through a combination of fundraising efforts, the Y will need to raise a) a minimum of \$100,000 in order to meet financial assistance, programmatic and operational needs of the main facility; b) a minimum of \$226,000 to support financial assistance and programmatic needs of the Early Learning Program.
7. In the second and third quarters, create a Planned Giving Program for the Y.

**Year 3: 2019**

1. Establish a philanthropic culture of fundraising that involves board, staff and volunteers.
2. Review and update the organization's strategic plan.
3. Review and update the organization's fundraising plan.
4. Update fundraising cultivation plan in January, 2018.
5. Increase the number of recurring bank draft or payroll contributions by Y members and staff by 25%.
6. Through a combination of fundraising efforts, the Y will need to raise a) a minimum of \$100,000 in order to meet financial assistance, programmatic and operational needs of the main facility; b) a minimum of \$226,000 to support financial assistance and programmatic needs of the Early Learning Program.
7. Conduct planned giving presentations for a minimum of three prospective donors.

## **Fundraising Strategies**

### **Board**

- Complete work on organizational strategic plan.
- Establish Development Committee.
- Schedule Board of Directors Campaign for March through April; include pledge options.
- Conduct a series of fundraising trainings during first quarter Board of Directors meetings.
- Strive toward 100% participation by board in campaign.
- Report progress of campaign at each board meeting. Include progress on impact measurements.

### **Membership**

- \$25 flat joining fee for 2017 in honor of 25<sup>th</sup> Anniversary.
- Thereafter, special fee waiver promotions as determined by staff and membership committee.
- Provide small gift of no more than \$10 for each new membership.

### **Major Gifts**

- Review all current donors, prospects and suspects; assign appropriate number of prospects for cultivation and solicitation.
- Create and implement a strategy for each assigned prospect.
- Involve leadership staff, board and advocacy in major gifts identification, rating, solicitation and thanking.

### **Marketing**

- Utilize Y-USA Nationwide Campaign collateral.
- Update appeal letters and other campaign collateral to focus on the benefits of giving to the Y.
- Include and keep current, information about the organization and its annual campaign on website.
- Utilize multiple forms of media, including Facebook, Twitter, electronic newsletters and mobile app, as well as local media, to promote the Y, its annual campaign and various programs.



### **Planned Giving**

- Create a Planned Giving program for the Y.
- Work with Development Committee and other community leaders to identify planned giving prospects.
- Conduct planned giving presentations to introduce the Y's program.

### **Special Events**

- Establish criteria for selection of fundraisers and special events to ensure a sufficient return on investment of staff time and organization resources.

## **Case for Support**

For many years, YMCAs were considered to be merely swim and gym facilities, but that is no longer an accurate assessment. Rather, the Alleghany Highlands YMCA is a leading nonprofit organization for youth development, healthy living and social responsibility, and one of more than 2,700 Y's across the US with a similar mission to put Christian principles into practice through programs that build healthy spirit, mind and body for all.

Originating as a small work-out facility and child care program, the Alleghany Highlands Y has grown to encompass a 37,000 square foot facility with numerous amenities.

Two off-site locations offer early learning and after-school programs for more than 200 youth. Studies have shown that individuals enrolled in quality programs like the Y's earn higher wages, are more likely to graduate from high school, own homes, and less likely to commit crimes. They also found an economic benefit: a return on investment at 12 percent ("The Raising of America" 2015)!

Many people find the Y synonymous with swimming. In fact, more than two hundred people learn to swim here each year. We're also busy working with people to prevent type 2 diabetes and manage arthritis. Yet, we're still here to provide a safe place for families and friends to gather, work out and have fun.

To make meaningful and enduring impact in our service area, we believe it is important to actively seek and receive philanthropic contributions from Y leaders, members and participants, as well as the community served. Philanthropic gifts are essential to providing the financial resources needed to expand the reach and impact of the Y. Through building a strong philanthropic culture at our Y, leaders, members and participants, when making a gift or asking

others to give, are putting Christian principles and the value of caring into practice in their own lives and setting an example for the entire community.

### Action Plan

<b>2017 Strategy</b>	<b>Goals</b>	<b>Steps</b>	<b>Who</b>	<b>When/ How Much</b>
Operational and Fundraising Plan Review	<ul style="list-style-type: none"> <li>Plans will be approved.</li> </ul>	1. Agenda Item	Staff / Board	Feb / copy expense
Board Training	<ul style="list-style-type: none"> <li>All board members.</li> </ul>	1. Agenda Item	Staff /	Jan – Mar / \$50
Board Campaign	<ul style="list-style-type: none"> <li>\$4,000</li> <li>Non-public campaign solicitation to board</li> </ul>	1. Develop Campaign Collateral 2. Group and individual contacts	Staff / Development Committee	Feb – Mar / \$200
Major Gifts	<ul style="list-style-type: none"> <li>\$20,500</li> <li>4 Donors: 1 - \$5,000 5 - \$1,000 16 - \$500 10 - \$250</li> </ul>	1. Research Prospects 2. Schedule Personal Visits 3. Kick-off / Solicitation Events	Staff / Development Committee / Board / Key Volunteers	Apr – Jun / \$200 - office supplies; \$300-solicitation expense; \$1,500 – donor recognition
General Campaign Appeal	<ul style="list-style-type: none"> <li>\$14,500</li> </ul>	1. Direct Mail Campaigns 2. Personal Visits 3. Giving Tuesday 4. Year-end Appeal	Staff / Development Committee / Board	Apr – Dec / \$300
Grants	<ul style="list-style-type: none"> <li>\$282,000</li> <li>Minimum of 4 grants will be prepared and submitted.</li> </ul>	1. Research grant making entities 2. Compile supporting data and documents 3. Obtain board approval as necessary	Staff	Feb, Mar, Sep / Copy expense, CEO time
Special Events	<ul style="list-style-type: none"> <li>\$5,000 net income</li> <li>Board fundraisers</li> <li>Thirty-One Days</li> <li>Online Auction</li> </ul>	1. Develop schedule of events 2. Assign planning responsibilities 3. Solicitation of sponsorships	Staff / Board	Feb – Dec / \$2,000 / copy expense and materials purchase, CEO and MS

				Director time
Capital Plan	<ul style="list-style-type: none"> <li>Establish funding plan to begin with 2018 budget</li> </ul>			
	<ul style="list-style-type: none"> <li></li> </ul>			
<b>2018 Strategy</b>	<b>Goals</b>	<b>Steps</b>	<b>Who</b>	<b>When/ How Much</b>
Operational and Fundraising Plan Review	<ul style="list-style-type: none"> <li>Plans will be updated and approved.</li> </ul>	1. Agenda Item	Staff / Board	Jan / copy expense
Board Training	<ul style="list-style-type: none"> <li>All board members.</li> </ul>	1. Program Item on Agenda	Staff / Board Trainer	Jan – Mar / \$50
Board Campaign	<ul style="list-style-type: none"> <li>\$4,000</li> <li>Non-public campaign solicitation to board</li> </ul>	<ol style="list-style-type: none"> <li>Develop Campaign Collateral</li> <li>Group and individual contacts</li> </ol>	Staff / Development Committee	Feb – Mar / \$200
Major Gifts	<ul style="list-style-type: none"> <li>\$23,000</li> <li>4 Donors:               <ul style="list-style-type: none"> <li>1 - \$5,000</li> <li>5 - \$1,000</li> <li>20 - \$500</li> <li>12 - \$250</li> </ul> </li> </ul>	<ol style="list-style-type: none"> <li>Research Prospects</li> <li>Schedule Personal Visits</li> <li>Kick-of / Solicitation Events</li> </ol>	Staff / Development Committee / Board / Key Volunteers	Apr – Jun / \$200 – office supplies; \$300 – solicitation expense; \$1,500 – donor recognition
General Campaign Appeal	<ul style="list-style-type: none"> <li>\$12,000</li> </ul>	<ol style="list-style-type: none"> <li>Direct Mail Campaigns</li> <li>Personal Visits</li> <li>Giving Tuesday</li> <li>Year-end Appeal</li> </ol>	Staff / Development Committee / Board	Apr – Dec / \$300
Grants	<ul style="list-style-type: none"> <li>\$287,500</li> <li>Minimum of 4 grants will be prepared and submitted.</li> </ul>	<ol style="list-style-type: none"> <li>Research grant making entities</li> <li>Compile supporting data and documents</li> <li>Obtain board approval as necessary</li> </ol>	Staff	Feb, Mar, Sep / Copy expense, CEO time
Special Events	<ul style="list-style-type: none"> <li>\$5,000 net income</li> <li>Board fundraisers</li> <li>Thirty-One Days</li> <li>Online Auction</li> </ul>	<ol style="list-style-type: none"> <li>Develop schedule of events</li> <li>Assign planning responsibilities</li> </ol>	Staff / Board	Feb – Dec / \$2,000 / copy expense and materials

		3. Solicitation of sponsorships		purchase, CEO and MS Director time
Planned Giving	<ul style="list-style-type: none"> <li>Plan developed</li> </ul>	1. Obtain services of consultant/ professional to guide process	Staff / Board / Consultant	Jul – Dec / \$3,000 – consultant fees
Capital Plan	<ul style="list-style-type: none"> <li>\$10,000 net income</li> <li>Tiny House Project</li> </ul>	<ol style="list-style-type: none"> <li>Select Project</li> <li>Solicit for volunteers</li> <li>Solicit for materials</li> <li>Marketing throughout construction and sale</li> </ol>	Staff / Board	Jan – Nov / \$40,000 in materials / \$500 in marketing and print collateral
2019 Strategy	Goals	Steps	Who	When/ How Much
Operational and Fundraising Plan Review	<ul style="list-style-type: none"> <li>Plans will be updated and approved.</li> </ul>	1. Agenda Item	Staff / Board	Jan / copy expense
Board Training	<ul style="list-style-type: none"> <li>All board members.</li> </ul>	1. Program Item on Agenda	Staff / Board Trainer	Jan – Mar / \$50
Board Campaign	<ul style="list-style-type: none"> <li>\$4,000</li> <li>Non-public campaign solicitation to board</li> </ul>	<ol style="list-style-type: none"> <li>Develop Campaign Collateral</li> <li>Group and individual contacts</li> </ol>	Staff / Development Committee	Feb – Mar / \$200
Major Gifts	<ul style="list-style-type: none"> <li>\$28,000</li> <li>4 Donors:               <ul style="list-style-type: none"> <li>1 - \$5,000</li> <li>1 - \$2,000</li> <li>6 - \$1,000</li> <li>24 - \$500</li> <li>14 - \$250</li> </ul> </li> </ul>	<ol style="list-style-type: none"> <li>Research Prospects</li> <li>Schedule Personal Visits</li> <li>Kick-off / Solicitation Events</li> </ol>	Staff / Development Committee / Board / Key Volunteers	Apr – Jun / \$200 office supplies; \$300 – solicitation expense; \$1,500 – donor recognition
General Campaign Appeal	<ul style="list-style-type: none"> <li>\$12,000</li> </ul>	<ol style="list-style-type: none"> <li>Direct Mail Campaigns</li> <li>Personal Visits</li> <li>Giving Tuesday</li> <li>Year-end Appeal</li> </ol>	Staff / Development Committee / Board	Apr – Dec / \$300
Grants	<ul style="list-style-type: none"> <li>\$287,500</li> </ul>	1. Research grant making entities	Staff	Feb, Mar, Sep / Copy

	<ul style="list-style-type: none"> <li>• Minimum of 4 grants will be prepared and submitted.</li> </ul>	<ol style="list-style-type: none"> <li>2. Compile supporting data and documents</li> <li>3. Obtain board approval as necessary</li> </ol>		expense, CEO time
Special Events	<ul style="list-style-type: none"> <li>• \$5,000 net income</li> <li>• Board fundraisers</li> <li>• Thirty-One Days</li> <li>• Online Auction</li> </ul>	<ol style="list-style-type: none"> <li>1. Develop schedule of events</li> <li>2. Assign planning responsibilities</li> <li>3. Solicitation of sponsorships</li> </ol>	Staff / Board	Feb – Dec / \$2,000 / copy expense and materials purchase, CEO and MS Director time
Planned Giving	<ul style="list-style-type: none"> <li>• Prospective Donor Presentations – 3</li> </ul>	<ol style="list-style-type: none"> <li>1. Develop marketing and presentation plan</li> <li>2. Identify potential donors</li> <li>3. Contact targeted individuals for appointment</li> </ol>	Staff / Development Committee	Jan – Dec / \$500 for print collateral; \$150 for meeting expenses / Staff time
Capital Plan	<ul style="list-style-type: none"> <li>• \$10,000 net income</li> <li>• Tiny House Project</li> </ul>	<ol style="list-style-type: none"> <li>1. Select Project</li> <li>2. Solicit for volunteers</li> <li>3. Solicit for materials</li> <li>4. Marketing throughout construction and sale</li> </ol>	Staff / Board	Jan – Nov / \$40,000 in materials / \$500 in marketing and print collateral

### Annual Campaign Budget

REVENUE	2017	2018	2019
Major Donors (\$1,000 <sup>+</sup> )	\$5,000	\$5,000	\$5,000
Mid-level Donors (\$250 - \$999)	\$7,500	\$9,500	\$13,000
Low-level Donors (< \$249)	\$14,500	\$12,000	\$12,000
<b>TOTAL INDIVIDUAL DONORS</b>	<b>\$27,000</b>	<b>\$26,500</b>	<b>\$30,000</b>
Alleghany Foundation	\$276,000	\$276,000	\$276,000
Dominion Power (Little House Project)		\$5,000	\$5,000
Lowe's Charitable Foundation (Little House Project)		\$2,000	\$2,000
Love Travel (Financial Assistance)		\$1,000	\$1,000
Reynolds Foundation (Little House Project)		\$500	\$500
Y-USA (Enhance Fitness Program)	\$3,000		
Y-USA (Swim Lesson Grant)	\$3,000		
Swim Lesson Community Donors		\$3,000	\$3,000
<b>TOTAL GRANTS</b>	<b>\$282,000</b>	<b>\$287,500</b>	<b>\$287,500</b>
Major Donors (\$1,000 <sup>+</sup> )	\$6,000	\$6,000	\$6,000
Mid-level Donors (\$250 - \$999)	\$2,000	\$2,500	\$3,000
Low-level Donors (< \$249)	\$1,000	\$1,500	\$2,000
<b>TOTAL CORPORATE &amp; BUSINESS</b>	<b>\$9,000</b>	<b>\$10,000</b>	<b>\$11,000</b>
Thirty-One Days of December	\$1,500	\$2,000	\$2,500
On-line Auction	\$1,500	\$2,000	\$2,500
Memory Tile Project (25 <sup>th</sup> Anniversary)	\$3,000	\$2,000	\$1,000
Gun Raffle	\$2,000	\$2,000	\$2,000
Little House Fundraiser	\$0	\$45,000	\$47,000
<b>TOTAL EVENTS</b>	<b>\$8,000</b>	<b>\$53,000</b>	<b>\$55,000</b>
<b>TOTAL INCOME</b>	<b>\$326,000</b>	<b>\$377,000</b>	<b>\$383,500</b>

EXPENSES	2017	2018	2019
Consulting Fees (Planned Giving Program)		\$3,000	
Donor Recognition	\$1,500	\$1,700	\$2,000
Direct Mail	\$300	\$300	\$300
Tiles	\$600	\$500	\$200
Event/Campaign Kick-Off	\$200	\$200	\$200
Volunteer Training	\$50	\$50	\$50
Solicitation Costs	\$300	\$300	\$300
Membership Recognition Gift	\$1,000	\$1,000	\$1,000
Other	\$200	\$200	\$200
Tiny House Construction Expense		\$40,000	\$40,000
Planned Giving – print and solicitation cost			\$650
<b>TOTAL EXPENSES</b>	<b>\$4,150</b>	<b>\$47,250</b>	<b>\$44,900</b>



### Schedule and Responsibilities

Staff	2017	2018	2019
<b>Jennifer Unroe – President and Chief Executive Officer (25% Fundraising)</b> Oversee Y Operations Manage Y Board Oversee Strategic Plan Process Proposal Writing Budget Development/Management <i>Fundraising/Development Team</i> Annual Report <i>Marketing (Gayle)</i> <i>Special Events Support</i>	\$14,456	\$14,456	\$14,745
<b>Gayle Kitchen – Member Services and Development Director (25% Fundraising)</b> <i>Fundraising Strategic Planning (Jennifer, Development Committee)</i> Manage Development Committee <i>Fundraising (Jennifer, Development Committee)</i> <i>Marketing Team</i> <i>Special Events Oversight (Jennifer, Development Committee)</i> <i>Planned Giving Oversight (Jennifer, Development Committee)</i>	\$9,020	\$9,201	\$9,385
<b>Development Committee</b> <i>Fundraising/Development Team</i> <i>Special Events Support</i>	\$300	\$300	\$300
<b>Materials</b> <i>Stationary Supplies</i> <i>Printing (in-house)</i> <i>Printing (outside)</i> <i>Postage</i> <i>Copying Expense</i> <i>Website/Electronic Mailing Fees</i>	\$700	\$1,200	\$1,800
<b>TOTAL STAFF TIME AND MATERIALS</b>	<b>\$24,476</b>	<b>\$25,157</b>	<b>\$26,230</b>

### Monitoring/Control

Indicator	Baseline	Target		
		2017	2018	2019
Total Contributions (Annual Campaign)	An average of \$78,000 was raised through the Y's annual campaign over 2015 and 2016.	\$100,000	\$139,500	\$146,000
Total Number of Contributions	An average of 66 donors gave in 2015 <u>or</u> in 2016.	75	80	85
Total Number of Member/Employee Campaign Drafts	In 2016, eleven members and staff made contributions through bank/credit card draft or payroll.	16	20	25
New Donors	Twenty new donors in 2016.	10	10	10
Repeat Donors	An average of 53 donors gave in 2015 <u>and</u> in 2016.	60	65	70
Planned Giving presentations conducted.	No history.	-	-	3

### *Sources*

Virginia Department of Health, *Virginia Behavioral Risk Factor Surveillance Survey*. (2015).

Retrieved from Virginia Department of Health website:

<http://www.vdh.virginia.gov/diabetes/data/>

Weldon Cooper Center for Public Service Demographics Research Group, *July 1, 2015*

*Population Estimates for Virginia and its Counties and Cities*. (January 27, 2016).

California Newsreel, *The Raising of America: Early Childhood and the Future of Our Nation*.  
(2015).