

## **Roadmap for XXXXXX and The Nonprofit Spot Engagement**

Throughout summer 2020, The Nonprofit Spot team will engage in a series of strategic activities to further XXXXXX's development operations and to position the organization for future success in fundraising. We have identified a number of key areas to help guide our team's work during this period, including:

### **Data Processing and Management**

*Overview:* Successful fundraising teams utilize data to guide decision-making and XXXXXX is still in its infancy in terms of data reporting and usage. The Nonprofit Spot team will conduct a systemic overview of the organization's data management and reporting systems with respect to donors and fundraising, providing a roadmap for the future.

*Activities:*

- Gain access to reports/database utilized by the XXXXXX team
- Gain an understanding of the processes that the XXXXXX team currently uses to track and record gifts
- Develop a list of potential weekly, monthly and quarterly reports for use by the team
- Perform a wealth screening of XXXXXX top 500 prospects/donors

*Timeline:* Our estimated timeframe for completion is the end of July 2020.

*Deliverables:*

- Wealth Analysis with top prospects identified
- List of reports and report parameters to be run at regular intervals. If possible, we will set up report templates in the system.
- Written processes for XXXXXX gift processing

### **Competitive Analysis**

*Overview:* The XXXXXX team has identified a number of other schools that could provide insight into the organization's future fundraising efforts. The Nonprofit Spot team will conduct a review of how these organizations are organized, the types of fundraising in which they engage and the types of funding opportunities they provide for donors.

*Activities:*

- Perform an analysis of funding models, funding opportunities, alumni outreach and activities, development staffing models and other key information for the following: (List of comparable organizations)

*Timeline:* We would like to complete this analysis by July 4<sup>th</sup>, as the information gleaned may help inform other recommendations.

*Deliverables:* We will prepare a written report detailing our findings and offering a series of recommendations

### **Integration of Development and Marketing/Communications**

*Overview:* Mature development organizations work hard to ensure that fundraising needs are integrated with the organization's overall communications strategy. Developing a schedule of potential strategic marketing and PR efforts going forward will be critical.

*Activities:*

- Attend weekly marketing communications meeting to gain a better understanding of XXXXXXXX's current and future efforts
- Review any XXXXXXXX marketing schedules/calendars that currently exist
- Develop a projected calendar of marketing activities for the 2020-21 year.

*Timeline:* We will begin attending meetings in June, but the bulk of our activity will be completed by August 15<sup>th</sup>.

*Deliverables:* We will prepare a written development-related calendar for the 2020-21 school year

### **Develop One-Page Overviews of All Funding Opportunities**

*Overview:* In order for the organization to be successful at fundraising in the short-term and long-term, XXXXXXXX should have a series of one-page explanations/promotional pieces that can be used to engage donors. This effort will include a review and recommendation for funding and endowment policies.

*Activities:*

- The Nonprofit Spot team will work with the XXXXXXXX team to identify potential funding opportunities throughout the school and the individual campuses.
- The Nonprofit Spot team will work to understand the current scholarship funds available at the school and will develop a written set of scholarship/endowment policies

*Timeline:* We anticipate that this will be completed before the end of the summer.

*Deliverables:*

- We will prepare a series of one-page overviews of all funding opportunities.
- We will prepare a one-page scholarship policy overview

### **Assistance with Ongoing Fundraising Initiatives**

*Overview:* The focus for Summer 2020 will be on the identification and cultivation of potential prospects. That being said, there are a number of activities that will need to take place in order to continue to keep the leadership team engaged in development activities and The Nonprofit Spot is committed to leading that effort.

*Activities:*

- We will work with the XXXXXXXX team to identify short-term cultivation opportunities for the XXXXXXXX team to pursue.
- We will engage in meetings throughout the summer to develop a list of potential major gifts donors for the future.

*Timeline:* This will be ongoing.

*Deliverables:*

- Prepare a list of mini-fundraising initiatives that XXXXXXXX could utilize over the next few months. This will likely include mini-match/challenge activities surrounding key needs and initiatives.
- Utilizing key development data about past donors, implement fundraising activities that engage the team in activities that are likely to produce short-term and long-term results.
- Reset expectations for ongoing development activities, including an immediate focus on cultivation and the development of a realistic and achievable fundraising goal

## **YYYY's 45<sup>th</sup> Anniversary Campaign Plan**

**DRAFT**

**Executive Summary**

YYY's 45<sup>th</sup> anniversary provides an exceptional opportunity for the organization to promote and extend its brand in the community. In addition, the 45<sup>th</sup> anniversary could provide an exciting opportunity to re-engage lapsed donors and supporters, as well as to bring new corporate, governmental and local community supporters to the organization.

**45<sup>th</sup> Anniversary Honorary Committee**

In order to brand the anniversary campaign as a unique celebration, YYYY wishes to establish an honorary committee for the 45<sup>th</sup>. This would be separate from the organization's board of directors, would be time stamped for one year and would be a way to engage former supporters and high-profile members of the community in the organization's efforts. The honorary committee will lend their names to the effort and agree to help promote the organization's programs and initiatives. We will take the following steps:

- Develop a list of high-profile leaders and supporters that might be approached to serve
- Develop a letter asking them to participate and serve on the committee
- Develop and implement a mechanism to ensure that a list of supporters is attained

**Marketing and Public Relations**

One of YYY's strategic goals for 2018 is to systemize and strengthen its communications efforts and the 45<sup>th</sup> anniversary provides an exceptional opportunity for this work. The Nonprofit Spot team will secure media partners to serve as 45<sup>th</sup> anniversary media sponsors. Although specific sponsors may require specific negotiations, in general, YYYYYY would offer to promote the media partner throughout the year, while the media partner would offer advertising opportunities and provide coverage of the organization's events and programs. Potential media sponsors could include BLAC Magazine, the Michigan Chronicle, Comcast and any radio or TV stations with which YYYYYY has a relationship. Depending upon the success of this initiative, prominent members of the metro Detroit community could participate in a series of PSA's to thank YYYYYY for their service to the community.

**Events**

Throughout the year, YYY hosts a number of events that could be strategically positioned to promote the 45<sup>th</sup> anniversary. One or two new events will be included in the campaign, but there are also numerous ways in which the organization's ongoing events can have a 45<sup>th</sup> anniversary flair to them. Some examples include:

*YYY Golf Outing* – Provide a special commemorative item to all golfers that recognizes the 45<sup>th</sup> anniversary. In addition, the fee could be raised by \$45 to include a special one-time contribution to the organization.

*YYY Auction Extravaganza* – The silent auction could be themed to include 45 exceptional items for bid, or a raffle could be included that had \$45 tickets. The networking event could also have a \$45 ticket to commemorate the anniversary.

*YYY Dinner* – This event probably provides the best opportunity for the incorporation of the 45<sup>th</sup> anniversary, as the Nonprofit Spot will plan and execute a black-tie celebration.

### **Volunteers**

One of the goals of YYY's strategic plan is to increase its volunteer base. In keeping with that goal, YYY will put out a call for 45 new volunteers to assist in the programs and events of the anniversary campaign. These volunteers will work with The Nonprofit Spot or the YYY staff to promote the organization and its offerings. By time stamping the new volunteers as the "45<sup>th</sup> Anniversary Volunteer Corps," YYY will be able to attract a new type of volunteer and to engage them in activities that are directly related to the anniversary. The Nonprofit Spot team will also work to develop ways in which they could directly support the organization and its 45<sup>th</sup> anniversary campaign, promoting it to young professionals.

### **Commemorative or Promotional Items**

The Nonprofit Spot team will prepare a special item or promotional piece that will be used throughout 2015 to promote the organization's anniversary campaign. Ideas include:

- Preparing a 2-3 minute promotional video that could recognize the organization's storied past and promotes future goals. This video could also be useful in recruiting board members, donors and new employee campaign participants.
- Developing a commemorative book that would showcase highlights from the organization's first 45 years and will be distributed at the annual dinner.
- Developing a commemorative pin or wearable item that could be given to important stakeholders and could be available for purchase by other constituents

### **Employee Giving Campaigns**

One of the goals that YYY has identified is the need to strengthen and extend its roster of employers who participate in an employee giving campaign. In its 45<sup>th</sup> year, YYY has set the ambitious goal of attracting 45 new organizations/companies of all sizes to participate in this initiative. This is also a very measureable goal that could provide focus for YYY's efforts.

### **Fundraising Opportunities**

Of course, at the heart of many of these initiatives is the goal of raising much-needed funds for the organization and there are numerous ways in which the 45<sup>th</sup> anniversary can be utilized to extend the organization's fundraising goals. Specifically, YYY will consider the following:

- Set a goal of recruiting 45 members of the YYY Advisory Council at \$1,000/member
- Develop a direct mail campaign targeted at past supporters, asking them to re-engage by making a donation of \$45 in support of the anniversary
- Develop a corporate giving campaign to ask 45 companies to provide a grant of \$1,000 or more in support of the organization's anniversary
- NPS will work to develop a mobile giving campaign of \$4.50/person/month in support of YYY's 45<sup>th</sup> anniversary campaign
- Develop a sponsorship package that will allow organizations to become year-long sponsors of the anniversary celebration. Package benefits could include a table at the Dinner, a foursome for the golf tournament, a sponsorship at the Classic Car event and the opportunity to advertise on the organization's website.

## **Project Outline to ZZZ**

### **Project #1 – Conducting an Analysis of ZZZ’s Current Operations**

The goal of this project is to provide the board leadership of ZZZ with a thorough analysis of its current state, including, but not limited to a review of recent grants and current grant obligations; a review of the organization’s current financial state and an identification of any issues surrounding this topic; an analysis of expected cash flow through the end of the year; and a review of organizational policies and procedures. Some of the specific areas that we have identified are:

#### Grants and Funding Analysis

- Review current Grants Calendar to ascertain upcoming deadlines and reporting needs
- Review current grant documents and contracts
- Review lists of top donors/current donors to help determine cash flow and to identify any revenue/expense issues
- Perform test reconciliations between the E-tapestry donor database, QuickBooks records and paper files to help determine any systemic issues with respect to reporting and documenting of gifts and grants

#### Program Analysis

- Work with ZZZ program staff to determine the extent to which programs are in compliance with any grants and contracts
- Analyze the currently planned expenses for the 2015-16 school year and performance season to assist in cash flow analysis

#### Financial Analysis

- Review current and recent financial statements, including the Statement of Revenue and Expenses, Cash Flow Analysis and Audits.
- Review current practices with respect to the process of handling the inflows and outflows of funds for the organization
- Review current written procedures for financial reporting and recordkeeping to determine if these practices are being implemented

#### Organizational Analysis

- Review job descriptions and organizational chart to determine assigned roles and responsibilities of all staff members, assessing changes in duties over time
- Analyze the activities of the current Executive Director to determine which duties may need to shift/be performed by interim management during the time of transition

#### *Project Deliverables:*

As a result of this project, The Nonprofit Spot will produce a comprehensive written report detailing the findings of the initial analysis, as well as recommendations for how the organization should proceed on a short-term (6 months – 1 year) basis.

### **Project #2 – Developing and Implementing an Appropriate Communications Strategy for the Time of Transition**

The transition from a founding Executive Director to another leader is one of the most important moments in an organization’s lifecycle. The team at NPS will assist ZZZ in a number of ways with respect to this project, including but not limited to:

- Development of a Messaging Campaign to announce and celebrate the transition

## Service Provider RFP Sample Documents

- Preparation of Internal and External Communications to key stakeholders. This may include the development of press releases, e-news blasts, letters to donors and supporters and a plan to communicate with external funders.
- Implementation of a media relations campaign to announce and celebrate the transition. This would include pitching stories to publications and media outlets throughout southeastern Michigan, as well as utilizing social media outlets to promote the transition.

### *Project Deliverables:*

NPS would begin by preparing a written strategic communications plan that would outline key actions to be taken over the next two months. Once approved, NPS would be ready to implement the actions to the best of our ability.

### **Project #3 – Interim Management Services**

Recognizing that there is likely to be a period of transition for the organization during which time no Executive Director will be in place, The Nonprofit Spot will provide interim management services to ZZZ. In addition, depending upon the results of the analysis of ZZZ's current operations (Project #1), there may be some immediate actions that need to be undertaken in order to rectify any serious issues uncovered.

Although it is somewhat challenging to determine exactly what ZZZ's needs are with respect to this project, some of the potential duties that NPS could complete during this time include:

- Ensuring that ongoing program, marketing and fund development activities are implemented. We will work to ensure that the organization remains effective in meeting its mission and maintaining sound practices during this time of transition.
- Interfacing with donors and stakeholders. We will work with the board and staff to identify key donors and other stakeholders, provide updates and ongoing communication during the time that the organization is without a formal Executive Director.
- Preparing reports to the board of trustees as needed and attending all board meetings during the time of transition. NPS team members would work to ensure that the governance of the organization continues to function well and that the board has all of the information that it needs in order to oversee the organization.
- Ensuring the financial stability and solvency of the organization during the time of transition. NPS will ensure that all financial matters, including grants and contracts, are handled in an appropriate and responsible manner during the time of transition.
- Overseeing the search for a new Executive Director. Whether or not the organization's leadership chooses to engage a search firm or to handle the search internally, the NPS team will ready work with the ZZZ team to ensure that this project runs smoothly.

### *Project Timeframe:*

Some overlap with the current executive director would be necessary and we would recommend that this engagement begin in mid-late August. The engagement could end with the hiring of a new Executive Director or at the board's discretion.