

2022 East Bay SPCA

Interim Development Plan

SUMMARY

This INTERIM 2022 Development plan has been created for June – December 2022 as we slowly recover from staffing shortages. The interim plan targets three key objectives: building a strong and robust development and communications team, engaging our existing donor community, and increasing revenue per donor. We have outlined strategies to deepen and advance relationships with individual and institutional funders while also building leaders across the organization, including staff and board, in this effort.

The overall Development goal for FY22 is \$4.8 million. As of May 31st, we have raised 40% of this goal. We have laid out a plan consistent with our performance while considering factors that may shift as the public climate and environmental shift.

Goals for Gifts by Source

Program	2022 Goal	2021 Actual
Events	\$315,000.00	\$272,933
Grants	\$55,000.00	\$68,038
Major Gifts (\$1000+)	\$1,180,000.00	\$799,834
Ind Gifts (under \$1000)	\$2,000,000.00	\$1,408,148
Monthly Gifts (Constant Companion)	\$250,000.00	\$299,183
Bequests	\$1,000,000.00	\$4,875,131
TOTAL	\$4,800,000.00	\$7,424,084

2022 AREAS OF FOCUS

The 2022 plan includes 3 areas of focus for East Bay SPCA to sustain our performance and prepare for future growth. Key goals within each of these areas are noted below.

1. Building a Team

Leadership both from the board and staff will be essential to East Bay SPCA's successful evolution to a more comprehensive development operation. This begins with the leadership's role in ensuring employees feel valued and empowered. Our reputation as a good employer will also help us recruit talented team members who will help us advance the mission of the organization and achieve its ambitious goals.

- Articulate East Bay SPCA's unique role in animal welfare and its employee benefits to attract talented staff.
- Support the Development Committee in deepening their engagement in fundraising and understanding of East Bay SPCA's programs.
- Build a talented and passionate development team toward a comprehensive development program.
- Assess the fundraising and communications needs of the organization to accurately identify what positions need to be immediately filled.

2. Engaging Existing Donor Community

Having the team, the infrastructure, and the practices in place to support fundraising at every level will make it possible for East Bay SPCA to shift from a development program that relies heavily on a few top gifts to an operation that engages a growing base of major donors, a strong pipeline of annual supporters and bequests, and a sustainable core of institutional support. This begins with strategic planning, ongoing evaluation against goals, and budgeting that reflects growth both in contributed revenue and in East Bay SPCA's investment in development.

- Continue building a more proactive and strategic approach to developing and advancing relationships with donors and prospects.
- Expand opportunities for donors and prospects to authentically engage with East Bay SPCA and with one another in ways that strengthen their understanding of and commitment to our mission. This could be achieved through happy hour events, house parties, lunch and learns, and affinity groups.
- Ensure strong donor retention with a focus on increasing monthly giving and acquisition engagement. We do this by sharing the impact of a donor's gift and increasing personal interactions with donors.

3. Increasing Revenue Per Donor

Individual giving represents a significant growth opportunity for CCYJ as the organization seeks to build a more sustainable fundraising program. According to Blackbaud data, East Bay SPCA falls well below the average revenue per donor compared to other animal welfare organizations nationally. Currently, our donors donate \$427 per year as compared to industry average of \$1.9k a year. If we increased our revenue per donor to industry average, we could see a significant jump in revenue (\$4M increase).

This growth will focus on the creation of a much more robust major gift, planned giving, and annual fund program.

- Clearly communicate the impact of a donor's gift and what the increased impact would be if they stretched their giving.
- Identify donors who have the capacity to increase their giving and implement cultivation efforts to bring them to a larger gift.
- Increase our focus and efforts on thanking and stewarding donors who increase their giving.

We will track and monitor this progress by using data-driven dashboards to monitor progress at weekly team meetings and Development Committee meetings. We will also examine industry standards and data to measure the progress of our stewardship and cultivation efforts. Additionally, we will consistently examine analytics to determine what messages resonate with our donors and stakeholders.

INDIVIDUAL GIVING

Goals and Needs Revenue	FY22 Goal	FY22 Donor Goal	FY21 Actual	FY21 Donors
Individual Contributions	\$3,430,000	10,750	\$2,502,582	10,736
\$10,000 and up	\$750,000	70	\$434,693	67
\$1,000 - \$9,999	\$1,000,000	400	\$775,300	381
\$500 - \$999	\$680,000	600	\$329,231	567
Up to \$500	\$1,000,000	9,750	\$963,358	9,721

** Upon the creation of this plan, midway through 2022, we have only reached 30% of our 2022 goal. Therefore, the FY 2022 goals as outlined above may be too ambitious to achieve for this year. Factors at play include understaffing, current events, and a down economy.*

Individual Team Member Goals

Name	Position	Donor Type	Financial Goal
Allison Lindquist	President & CEO	Major Donors	\$340,000
Jennifer Whitaker	VP of Development and Communications	Major Donors	\$1,318,749
Christine Quattro	Marketing Manager	Annual Fund	\$750,000
N/A	Individual Giving Manager (Vacant)	TBD	

Major Gift Fundraising

Develop and build relationships with major donors and prospects (many of our prospects will come from our annual fund and Constant Companions membership).

- The Database Manager will identify annual fund and Constant Companion donors who have the capacity to become major donors
- The VP of Development and Communications will create portfolios of top donors and prospects and develop strategies for everyone in a portfolio, using check-in meetings to share ideas, review progress, get input, and course correct.

- President & CEO: 25 top-level individual donors (those capable of \$10k+ gifts)
- VP of Development and Communications: 125 individual donors and prospects capable of \$5k+ gifts
- Set clear goals for donor and prospect engagement that encourage proactive relationship development:

Donor meetings – Zoom calls, tours, or in-person meetings

- President & CEO: 2 to 4 per month
- VP of Development and Communications: 7 to 8 per month

Light contacts – phone calls, substantive email exchange

- President & CEO: 2 to 3 per week
- VP of Development and Communications: 5 to 7 per week

- Continue to segment donor engagement and acknowledgment based on giving level and longevity.

Annual Fund

Ensure strong donor retention with a focus on monthly giving and acquisition mailings.

- Include Constant Companion buck slips in donor mailings to encourage people to become monthly donors.
- Acknowledge Constant Companion donors for their longevity by writing thank you notes (from the Board) and acknowledging them at donor appreciation events.
- Analyze and maximize acquisition mailing efforts with the goal of recapturing lapsed donors.

EVENTS

Our event strategy includes two types of events – fundraising and community building.

- Host one house party to build the pipeline of major donors and identify new donors.

- Host one donor appreciation event to acknowledge long-time donors and communicate the impact of their giving.
- Create quarterly educational virtual (i.e., lunch and learns) events so that Board members can easily attend, invite others, learn about our work, and feel equipped to speak with prospective and existing major donors about EBSPCA.
- Determine the appropriate time to fill the vacant events position with a Development Associate (one who supports events and development administrative duties). Once hired, plan monthly community events with local breweries and wineries.

PLANNED GIVING

Planned giving has been a cornerstone of East Bay SPCA's fundraising especially in recent years. While not entirely dependable, bequests provide a safety net of significant funding for unexpected expenses. To build on the existing planned giving momentum, we will deepen our investment into this program.

- Review donor database to identify our planned giving prospects. Customize planned giving emails to articulate the positive impact on animals when someone adds us to a will.
- Host one planned giving educational event to teach prospects about the benefits of adding us to a will and how to do it.
- Assess budget to identify when we can sustainably hire a full-time planned giving officer.

INSTITUTIONAL GIVING

We will continue to pursue grant support from an expanding pool of prospects, with a target of identifying and qualifying approximately 10 new funders.

- Work to formalize the grants process. This revamp will ensure that all staff who interact with grants understand where each proposal is in the process, who has responsibility for which steps in the work, and what the calendar and pipeline look like. This clarity will enable the Vice President of Development and Communications to focus her energy on advancing relationships with funders. Steps in this process will include check-in meetings with the grants teams (programs, development, and finance) will be held monthly.
- Each foundation will have an assigned relationship manager to take the lead on ongoing relationship management. In most cases, the Vice President of Development and Communications will serve in these roles, with the Vice President of Operations and program managers also involved in moving relationships forward.

- All activities should be captured on the tracking sheet, with regular tracking and reporting in Raiser's Edge.
- The grants consultant will continue to build the pipeline of prospective funders through research focused on:
 - Program partners
 - Annual reports of like organizations
 - East Bay SPCA relationships
 - National database searches

GROWTH AND SUSTAINABILITY

The strategies and goals outlined above will, over time, position East Bay SPCA to significantly increase its revenue. In some cases, such as developing a robust major gift program, the full returns will take more than a single year to materialize. It will be important to monitor progress and understand what strategies are most effective while not being too quick to abandon a strategy that may simply need more time to get traction.

In the latter half of 2022, leadership will begin to lay the groundwork for an organizational strategic plan, which will guide our development and communications priorities in the coming years.