Executive Summary

The organization has reached a critical juncture and must make significant changes to improve its operations. Four key areas of focus for change have been identified: Fundraising and Development, Client Services, Brand Awareness, Marketing, and Technology.

To ensure financial stability and better serve clients, the organization will adjust its fundraising strategy and program offerings. The focus will shift from peer-to-peer (P2P) fundraising with clients to raising additional unrestricted funds through various means such as corporate partnerships, grants, major gifts, planned giving, individual donors, and events. The board will play a more active role in fundraising efforts, and a development and fundraising committee will be established, along with a give/get goal for FY '24. Three named fundraising programs will also be created, each with marketing materials and campaigns to support them.

To improve client services, the organization will build strategic relationships with hospitals and transplant centers. Existing relationships will be re-energized and re-focused to demonstrate the value of the organization to all transplant patients and dispel any misunderstandings about its purpose.

To increase brand awareness and effectiveness in marketing and attract more supporters, the organization will leverage digital marketing (social media, email, newsletters) and traditional marketing (print, word-of-mouth), and collaboration with other organizations as part of its marketing efforts. A library of materials will be created to improve marketing content, with impact statements evaluated for potential use, and client stories incorporated. The target audience(s) will be defined through analysis of demographics, psychographics, and behavioral data points of past donors. Client and donor journeys will also be outlined to increase conversion rates.

Finally, technology must be effectively used to operate efficiently and achieve the organization's mission. Three key areas will be addressed: the website, technology that supports remote work, and digitization and centralization of data. The current website needs improvement to better communicate the organization's mission and make it easier to donate. The organization will also update technology tools for remote employees and digitize and centralize data to make it more accessible to stakeholders.

In conclusion, the organization recognizes the need for significant changes in its operations to achieve its mission effectively. With a clear plan of action and strategic initiatives, the organization can build a stronger foundation for its future success.
Budget and Fundraising Goals

Budget

- Total Operating Expenses: $1,600,000 (A $600,000 shortfall in operations)
  - Client Grants: $1,300,000

Fundraising Goals

- Non-Client Unrestricted Fundraising Total: $800,000 (this is excluding the $100,000 from Google)
  - Client Fundraising: $1,500,000

Development and Fundraising

Fundraising Focus

The organization has focused on client Peer-2-Peer (P2P/Crowdfunding) fundraising strategies. This has produced successful results for the ability to fund client grants. When these types of funds are raised, they have a client expectation tied to them. The current language used is that for every dollar raised in this method, there is a 3% administrative fee (and credit card fees). This 3% + credit card fee does not adequately cover the organization’s expenses. For the past 15 years, we have been using client P2P fundraising to help cover operational costs. This has left the organization with fewer resources than client expectations.

In FY ’24 the organization will adjust its fundraising focus for the Development and Fundraising team to focus on additional unrestricted funds that can be used for operational expenses and as it continues to grow additional client programs. These team members will focus on solidifying the $500,000 non-client unrestricted funds currently brought in annually, making sure that we should not have any sudden drops in funding. They will also have a goal to bring in an additional $300,000 in FY ’24 by rebuilding our development and fundraising efforts in the following areas:

- Corporate Partnerships (Program Sponsorship, CSR, CCVs, etc.)
- Grants (foundation, corporate, and government agencies)
- Major Gifts (Individuals who can donate $10k+)
- Planned (Legacy) Giving
- Individual Donors (with a focus on creating recurring donors)
- Events

Overall, a successful fundraising strategy will include a combination of these approaches and engagement from the board. The Boards role in fundraising will be to work with the development team and board development committee to utilize their business and personal networks. The
Board will be expected to share information about the NFT programs and make appropriate introductions to prospective individuals and businesses that could support these programs. The development of materials to support this effort, which were previously unavailable, will be a part of the Marketing and fundraising efforts in early ’24.

**Programs**

NFT only has one active fundraising program, *Raise Hope*, which is a generic term for all fundraising done for clients. It makes it difficult to communicate the impact and share a value proposition with diverse types of organizations or grants that might have a limited scope due to this generality. This also restricts the organizations that we can approach because it might not align with their customer base or philanthropic goals.

In FY ’24, NFT will design three named programs that we can utilize in our development and marketing efforts. Examples may be:

- **Reviving Home Away From Home** *(Travel Assistance)*
- **Safe and Sounds** *(Mortgage and utility assistance)*
- **Medication program** *(Prescription Medication Support)*
- **Dental Services program**
- **Legacy of Love Program** *(Legacy Giving)*
- **Give to those who Give** *(Workplace Giving)*

These programs will have marketing materials and campaigns to support them. These programs will not add new services but formalize the programs that are currently combined into Raise Hope. The intention is that each program will have a way for individuals, corporations, and foundations to get involved (P2P fundraising, program sponsorship, etc.).

**The Board**

As outlined above, moving forward we would like all board members to be more active in the “ask” of the organization’s fundraising efforts. To this end, we will establish the Development and Fundraising committee. This committee works with the Director of Development and Fundraising to engage and partner with the board members to look at their personal and professional networks to identify potential donors (individuals and corporations) and help cultivate relationships with them. The development of a “playbook” will assist the board members, the Director of Development, and the Development and Fundraising Committee to do this effectively.

We will set a Give/Get goal for the board of $200,000 for FY ’24. The organization does not expect the board members to give $200,000 in personal donations. Setting a Give/Get goal helps reinforce one of the main purposes of a non-profit board. It also will inspire those that engage with the cause, by seeing the dedication of the board. The board plays a critical role in fundraising for the organization.
Client Services

We are committed to serving as many individuals as possible. To continue supporting additional individuals, we want to ensure that all parties are fully aware of the services we provide. From the interactions and requests from the community at large it appears that we have not communicated what NFT does sufficiently.

One of the most common misunderstandings is that the money individuals fundraise belongs to them personally and NFT acts as a non-profit “bank account” to hold those funds until they need it.

Unfortunately, this misunderstanding is not limited to the clients themselves, but also to the hospital associates they work with. We must address this and other misunderstandings of why we exist and how we add value to clients. To accomplish this, we will do the following.

Build Strategic Relationships

Many of our “relationships” with hospitals and transplant centers are with a single individual or service level only. There is not a deep understanding of who we are as an organization and what value we bring to their patient base. Many of these individuals have a preconceived notion that we only want to work with their patients that are financially distressed and that we cannot bring any value to their other patients.

We need to re-educate and rebuild the focus of our relationships with the hospital and transplant centers. We want them to know that we are here for all patients going through the transplant process, and not be afraid to ask them to change who they share our information with.

We need to centralize these non-client contacts and build an engagement plan for how we show our value as an organization.

That value will include:

- Identifying unique activities at hospitals and transplant centers and sharing as best practices.
- Educate about what resources might be provided by other organizations.
- Virtual educational opportunities to learn from industry experts.
- Networking and introduction opportunities within the transplant community.

Our strategic relationships will need to include organizations like United Network of Organ Sharing (UNOS), Society for Transplant Social Workers (STSW), Transplant Financial Coordinators Association (TMCA), Transplant Management Forum (TMF), organ procurement organizations (OPOs), and nonprofits that offer complimentary services. By implementing this approach, we will effectively establish ourselves as a top-of-mind organization for these entities, thereby elevating the chances of fostering more substantial collaborative ventures.

Clarify Application and Grant Processes
The current application process mixes the request for assistance and the fundraising requirements. This leads to the current clients having the perception that when they apply and begin to fundraise that they have an account with NFT and that the money in the account belongs to them. This puts NFT in a precarious situation because of IRS guidelines and client expectations of how funds can be used.

We need to re-evaluate the application process and make sure that it encourages everyone to fundraise without creating a potential negative expectation for the client.

There is essentially no grant process because of the structure of the application process. This is a challenge because it again sets the expectation that clients can utilize whatever money is in the “account” regardless of financial needs and limits the control of when and how funds leave the organization.

A granting process will be developed that will take into consideration the following:

- Health status
- Financial need
- Type of Assistance
- Engagement in the transplant community (active with the organization and/or fundraising)

By changing these two processes, we are confident that we should be able to assist current clients better, more clients eventually, and address the risk associated with the way the clients think about fundraising/grants today.

**Revamping Guide to Fundraising**

We will be working on digitizing and expanding the current Guide to Fundraising. As the P2P fundraising space changes because of modern technologies, social practices, and economic situations; we need to be constantly evaluating and providing content that will help our clients be successful at meeting their fundraising goals and in turn, help us as an organization help more individuals.

We will look at the transition from a physical booklet to digital content that can continually be updated and improved. We will work on creating digital fundraising packages around the different ideas and strategies that we encourage. These will provide clients with step-by-step instructions, the content needed (social posts, customizable flyers, thank you letters, etc.), donation forms/processes, and other resources that might be needed (swag, organizations to work with, etc.).

The most important aspect of this work will be to put powerful fundraising practices in the hands of our most enthusiastic supporters so that they can be as successful as possible and reach the goal of $1,500,000 in client fundraising in FY ‘24.

**Brand Awareness and Marketing**
Over the past few years, the brand awareness and positioning that NFT had within the transplant community have been weakened. With the turnover of the NFT staff, there is no institutional knowledge or documentation of what the marketing strategy and tactics were. There has been limited engagement via digital or traditional marketing with the community in a meaningful way that would generate credibility, trust, and emotional connections to the organization's cause for quite some time.

There are four areas of concern with our Brand and Marketing efforts that we will be working on this year to improve. They are:

- Brand Awareness
- Marketing Content
- Target Audience
- Marketing Journeys

**Brand Awareness**

Brand awareness can have a significant impact on a non-profit organization. If a non-profit has low brand awareness, it may struggle to attract the attention of potential supporters, which can limit its ability to raise funds and conduct its mission effectively. Brand awareness can also impact a non-profit's credibility and perceived impact. If a non-profit is well-known and well-respected, it may be seen as more trustworthy and effective in achieving its mission. This can help attract more support from donors and volunteers who believe in its cause and want to contribute to its success.

Building brand awareness as a non-profit organization with limited funds can be a challenge, but there are several cost-effective strategic activities we will be refining:

1. Leverage social media. Sharing updates on the organization and the impact we are having on clients. Encourage your supporters to share your posts with their networks to help spread the word even further.
2. Utilize email marketing to keep engaged and touch base with the different audience groups with newsletters and campaign engagement.
3. Collaborate with other organizations on marketing efforts.
4. Utilize word-of-mouth. Encourage current supporters to spread the word about the organization to their friends, family, and colleagues. Positive word-of-mouth can be a powerful tool for building brand awareness.

The goal for FY '24 will be to create a benchmark metric that we will be able to measure against.

**Marketing Content**

The current marketing content available for the staff of NFT and board is incomplete, inconsistent, disorganized, dated, unemotional, and limited to only targeting individuals to sign up for their fundraising. A large miss is the current marketing content does not celebrate the impact of the work NFT does to inspire the next donation.
In FY '24, we will work to create and maintain a library of marketing materials that will be managed by the Marketing and Communications Manager. Current content will be reviewed for relevancy, consistency in language and information, purpose, and impact. There will also be a focus on involving client stories that are motivational and represent the impact that NFT has on our communities.

Current impact statements will be evaluated for potential use and look for opportunities to improve and enhance them. Powerful impact statements are important for marketing a non-profit because they help to convey the organization's mission and achievements in a compelling way that resonates with potential donors and supporters.

Gaps identified in marketing content will be prioritized for development based on the impact on the organization (i.e. pitch decks for development vs birthday cards for clients). We will prioritize content that will help the organization bring in additional unrestricted funds (grants, corporate engagement, donor engagement, etc.) and then on materials that will bring in restricted funds as well as the need for materials to strengthen the brand and create awareness.

**Target Audience(s)**

Right now, there is no identified target audience(s) for our marketing materials. By having a clarified target audience(s), we will be able to tailor messaging and marketing efforts to better resonate with them and drive more donations. Casting a wide net in hopes of finding individuals who are generous in general or randomly might have an emotional attachment is an ineffective way to use the organization's marketing spend.

The organization will work to define a target audience(s) in FY '24. To do this we will analyze demographics of past general fund donors. We will look to incorporate psychographic and behavioral data points in our future marketing journeys to better understand who is giving and why.

**Client and Donor Journeys**

These journeys are important because they help the organization guide clients and donors through a specific and consistent experience. It will allow us to collect valuable information that can be used to adjust how the organization engages with these audiences and address any needs or concerns from these groups. We want to increase the conversion of a client, to a highly engaged client, to an ambassador. Converting a one-time donor, into a recurring donor and an advocate.

In FY '24, we will outline and begin the process of building out these journeys with the right marketing materials, digital tools, and data.

As the organization works to strengthen its brand awareness and improve its marketing materials, focusing on the right target audience(s), clearly communicating our value to the community, and sharing the impact of the fundraising programs should assist with the overall fundraising goals.
Technology

The effective use of technology is necessary for nonprofits in today’s market. Areas of technology need to be addressed to help with the effective operation of the organization. These areas are:

- Website
- Technology that supports remote work
- Digitization and Centralization of Data
  - Updated Financial Reporting

Website

The organization’s website does not accurately represent its current state or future aspirations. Its primary objective should be to convey the organization’s mission, purpose, and reasons for support. Moreover, the website’s donation process is excessively challenging.

Our goal is to revitalize the website by improving its user-friendliness, simplifying the donation process, and streamlining information consumption. In addition, we aim to showcase our campaigns and programs to increase online visibility, drive more web traffic, and broaden our audience which is critical to fundraising. With these changes, we hope to enhance the overall user experience and achieve our outreach objectives.

Tools to Support Remote Work

We have initiated the process of upgrading our technology infrastructure to enable seamless remote work, which is imperative for our organization’s future. However, this undertaking also underscores our technological lag, as we are several years behind where we should be. Our primary objective is to identify tools that can be utilized without requiring access to the NFT network, as well as migrate locally hosted tools such as Raiser’s Edge, The Vault, and file servers to the cloud.

This strategic move will significantly reduce our organization’s physical footprint, enabling us to optimize office space utilization while freeing our staff from reliance on office infrastructure in Memphis, particularly power and internet connectivity. Additionally, this approach enhances our flexibility in adapting to varying office space requirements and enables us to attract top talent from across the nation.

Digitization and Centralization of Data

As an organization, we continue to make progress in utilizing data more effectively. There are three areas that we will improve our data usage in ’24.

The first is an update to the accounting tool. We are doing this because the current tool is outside of the support window, meaning we are no longer receiving updates for patches and security. It has also required that the team do manual tasks that are time-consuming and way outside of best practices. Moving to one of the tools that have been identified as a potential
solution will also allow us to begin to move away from paper documentation that is currently housed and used about clients’ expenses.

Second, we will be evaluating how data is moved between the Vault, Mighty Cause, and Network for Good tools. Right now, there are different pieces of data being housed in various places and it causes difficulties in accessing datasets effectively. We also want to centralize other non-client/donor data so we do not lose institutional knowledge and will be able to utilize the data to extend the reach of what our team can do without a lot of manual effort (i.e., contacts at hospitals, vendors, etc.). For that, we will look at how the above systems might integrate with a CRM tool (Salesforce- free licenses).

The third will be to improve our reporting structure and tools. We aim to access the necessary information more frequently and in a faster and more efficient manner. This will involve making changes to the way data is presented and referenced in reports to make it easier to consume.

An example of this would be the ability to create and pull the NFT State Fund Fundraising Report. It would include fundraising amounts, grants allocated vs funds used. We also want to see how we make these types of reports available on demand 24/7 for our different stakeholders (clients, board members, etc.). This will allow us to use data more effectively and become organized.

**Key Performance Indicators (KPIs)**

From the work outlined above, we will need a way to evaluate our progress against the goals and milestones. The following KPIs will be used to assist in that process. We will use regular feedback and report-out session to measure where we are at as an organization and if adjustments need to be made.

- Increase non-client Unrestricted Fundraising by $300,000
- Increase Client P2P Fundraising to $1,500,000
- Active New Client Count to 210 for FY ’24
- Define 3 Client/Donor Programs for fundraising support.
- Develop six digital fundraising packages for client fundraising.
- Quarterly Newsletters established for three audiences.
- Marketing & Content Library with 12 client stories
- Develop at least 6 Strategic partnerships with new or existing transplant centers
- The ability to run on-demand reports for all 50 states’ funds.