



fy2024 development plan

Executive Summary

The following plan summarizes the revenue needs, fundraising activities, cultivation efforts, and marketing and communications strategies specific to Arbor Circle’s 2024 Development Plan. This is a living document that does change throughout the year as activities may be modified to fit current circumstances.

Revenue Sources Snapshot

Revenue Source	Budget Total
Grants	\$200,000
Arbor Circle Events	\$82,500
General Giving	\$50,000
Direct Mail Appeals	\$55,000
Third Party Fundraisers	\$22,500
Endowment Giving	\$3,000
Total Revenues	\$413,000

Revenue Sources Breakdown

I. **Grants** **Budget: \$200,000**

- a. Program Specific Grants
 - i. Includes Grants for the following programs:

Program	Amount
Women’s Services – Community Based Recovery Services	\$100,000
Counseling Services	\$50,000
The Bridge/Homeless Youth Services	\$25,000
Prevention – including Total Trek Quest (TTQ)	\$10,000
Early Childhood	\$10,000
Child Welfare	\$5,000

II. **Arbor Circle Events** **Budget: \$82,500**

- a. Spring Forward - \$70,000
- b. Community Specific Fundraisers - \$12,500

III. **General Giving** **Budget: \$50,000**

- a. Gifts not directly associated with an appeal/event - \$46,000
- b. All Other - \$4,000

IV. **Direct Mail Appeals** **Budget: \$55,000**

- a. Annual (Fall) Appeal - \$53,000
- b. Spring Appeal - \$2,000

V. **Third Party Fundraisers** **Budget: \$22,500**

- a. VanDyk Golf Outing - \$11,000
- b. Various other 3rd party fundraisers - \$11,500

VI. **Endowment Giving** **Budget: \$3,000**



Fundraising Activities and Strategy

I. Grants

- a. The following objectives apply to all grants:
 - i. Continued implementation of fundraising dashboard and grant tracking system to promote shared agency knowledge.
 - ii. Continued focus on growing Corporate, Community Foundation, and Private Foundation relationships in collaboration with Development Committee through identifying prospects and consistent updates and communication with existing relationships
 - iii. Collaborate with programs on grant opportunities that fit existing needs.

II. Arbor Circle Events and Sponsorship

Arbor Circle events consist of a series of friend and fundraising opportunities throughout the year, focused on growing our audience of donors and supporters while advancing awareness of our mission and work.

Sponsorship materials are available both for individual events and as a comprehensive Regional Sponsorship package for all events. Consistent sponsors have been assigned to specific Development staff to increase year-round engagement. This year’s Arbor Circle powered events are as follows:

- a. Growing Together
 - i. This friend-raising virtual event has a focus on diversity, equity and inclusion, slated for January of 2024 to coincide with Martin Luther King Jr. Day.
- b. Spring Forward
 - i. This event is Arbor Circle’s primary fundraising event and is currently slated as an in-person gathering in the Spring of 2024.
 - ii. Individual and sponsorship contributions, net event expenses, are undesignated support the organization.
 - iii. This event will continue to rely on Board supported committees for planning and sponsorship commitments as in past years.
- c. Seeds of Support – Ottawa County specific
 - i. This event is an in-person opportunity for our Holland/Ottawa county supporters slated for summer 2024.
 - ii. Event content will highlight work specific to our Holland office and celebrate our volunteers and staff.
 - iii. This event receives internal support from Holland-based staff.
- d. Final Taste of Summer
 - i. This in-person event geared towards leadership donors is slated for September 2024.
 - ii. This event is planned by the Development team with support from the Development Committee.

III. General Giving

a. Individual/General Giving and Major Gifts

This category includes gifts not directly associated with a specific appeal or event. Gifts in this category include gifts from major donors solicited on behalf of specific programs, general donations through our website and e-communications, or unsolicited gifts. Goals and objectives for this category include:

- i. Consistent lapsed donor follow-up outside of appeals. Target retention rate between 43% and 45%.



1. This includes ongoing, focused messaging to encourage recurring giving
2. Giving designations have been realigned with website, impact report, and other agency content to encourage regular giving based on individual donor preferences while maintaining funding flexibility
- ii. Increase consistent touchpoints with current major donors – including private family foundations. For FY24, we will continue developing the major donor portfolio for the organization to ensure ongoing sustainability.
- iii. Increase agency sustainability through consistent CRM usage, data entry, call reports and stewardship support
- iv. Continued focus on opportunities to increase donor base to include more donors of color, including event hosting opportunities.

b. All Other (includes United Way)

United Way: Arbor Circle continues to be engaged with all of our United Way partners by assisting with their respective campaigns. Arbor Circle runs a United Way campaign at the end of each calendar year.

IV. Direct Mail

The Development team will facilitate four donor-specific mailings for FY24*:

- i. Annual (Fall) Appeal
 1. November send date
 2. Direct mail appeal with email and social media components
 3. Mailed to previous individual and family donors – last 4 years of giving history, includes select businesses and foundations
- ii. Holiday Cards
 1. Holiday cards
- iii. Spring Impact Report Mailing
 1. April/May send date
 2. Stewardship-focused mailing to all current donors/sponsors with Impact Report with email and social media components
- iv. LYBUNT and First Time Donor Mailing
 1. August send date
 2. Retention focused mailing to all first time and LYBUNT (“Last Year But Unfortunately Not This”) donors.

*Note: Spring Forward and Final Taste of Summer also have an invitation mailing.

V. Third Party Fundraisers

This category includes fundraising driven by community members and partners through Third-Party Fundraisers.

- a. Existing: The following events are examples of consistent Third-Party Fundraisers. These events largely occur with little involvement from Arbor Circle and are subject to change.
 - i. VanDyk Golf Outing—typically raises between \$10,000 and \$15,000
 - ii. Corporate fundraisers
 - iii. Community groups
- b. Opportunities: Community engagement staff will cultivate and facilitate 3-5 additional third-party or corporate fundraisers in addition to maintaining existing partners.

VI. Endowment Giving

- a. Development staff and committee members will continue to include the endowment giving option where appropriate—this is also incorporated into our planned giving materials.

VII. Planned Giving



- a. Planned Giving
 - i. Planned Giving opportunities will continue to be shared in FY24 with a targeted audience.
 - ii. Annual Appeal and Impact Report materials will include Planned Giving language.

VIII. Stewardship and Acknowledgement

- a. All donors and sponsors represented in the categories above will be recorded in the CRM and will receive a printed or emailed thank you letter, depending on the nature of the contact information we have for each donor, and at least one additional stewardship piece as appropriate.
- b. Tax receipts are considered a separate acknowledgement and will go out in January each year.
- c. Holiday Cards are sent to a select group of community supporters and donors each year in November.

Cultivation Activities

I. Arbor Circle Volunteer Opportunities

The following volunteer opportunities are slated for FY2024:

- a. Board and Committee Leadership
- b. CASA – Court Appointed Special Advocate: Ottawa County specific, training available throughout the year
- c. Corporate Sponsorship: Targeted volunteer opportunities for Regional Sponsors, engaged Corporate Business Resource Groups (BRGs) and other groups
- d. Holiday Giving Program: Primarily Kent and Ottawa counties, seasonal – October through December
- e. Host Homes: Kent and Ottawa County specific, available all year
- f. Total Trek Quest: Allegan, Kent, Muskegon, Newaygo and Ottawa Counties, seasonal – Spring and Fall
- g. United Way and Community Group specific: All locations participate in their respective Day/Week/Month of Caring in addition to hosting other groups throughout the year

II. Volunteer Recruitment and Community Engagement

- a. Objectives for volunteer and community engagement in FY24 include:
 - i. Maintain a Diversity, Equity and Inclusion focus throughout our community engagement strategy, especially in regards to Board recruitment, advocacy on behalf of the agency, and our support of and collaboration with community partners.
 - ii. Strengthen and recruit for volunteer opportunities, including Board and Committees as well as our program-related opportunities, with consistent communication and regular volunteer stewardship.
 - iii. Maintain and grow calendar that outlines agency community commitments in terms of attendance, sponsorship, or other participation that aligns with our mission and strengthens Arbor Circle’s community presence, builds awareness of services, and/or recruits volunteers and donors.
 - iv. Create and implement an “Engagement Committee” to build opportunities for individuals to support Arbor Circle events, fundraising efforts, and to represent Arbor Circle at community events.
 - v. Cultivate 5 new corporate relationships while maintaining existing corporate giving opportunities, potentially paired with a volunteering component.



Marketing and Communications

I. Messaging

In FY24, messaging will emphasize the themes of social justice prevalent in our work, paired with the ongoing focus on diversity, equity, and inclusion and the relationship between equity and health/wellness.

- a. Agency messaging objectives for FY24 include:
 - i. Maintain Diversity, Equity and Inclusion lens throughout marketing tools and materials regarding:
 - 1. Marketing/Brand Identity
 - 2. Visual Representation
 - 3. Inclusive language
 - ii. Continue to grow media relationships and storytelling ability through frequent communication, including at least one press release per month.
 - iii. Maintain calendar of awareness events, activities, and specific dates that highlight the work of Arbor Circle, with a focus on mental health issues impacting communities of color, the LGBTQ+ community, and other disparately affected populations and communicate broadly to all agency representatives.
 - iv. Continue monthly communications through e-newsletters with a goal of increasing our open rate to 40% and our click rate to 3%.

II. Digital and Print Materials

- a. Specific needs related to agency materials for FY24, both print and digital, are as follows:
 - i. Develop and implement agency fundraising communications as outlined above
 - ii. Maintain/expand as needed marketing material library and tools, including the website and other agency materials, with input from program managers.
 - iii. Maintain and improve analytics and tracking for engagement on and through identified digital platforms. Current digital marketing platforms include:
 - 1. Social media: Facebook, Instagram, and Linked In
 - 2. Constant Contact
 - 3. Arbor Circle website
 - iv. Build on existing frame-work for cross-divisional marketing materials for similar programming.

Key Dates

I. The following are key Development dates for FY24:

- October 1st, 2023: FY24 begins
- October – December 2023: Holiday Giving
- November 2023 – January 2024: Annual Appeal
- November 29, 2024: Giving Tuesday
- January 11th, 2024: Growing Together
- May 22nd, 2024: Spring Forward
- May – June 2024: Spring Mailing
- July 2024: Seeds of Support
- September 2024: Final Taste of Summer
- September 30, 2024: FY24 ends