



fy2025 development plan

Executive Summary

The following plan summarizes the revenue goals, fundraising activities, cultivation efforts, and marketing and communications strategies and objectives that make up Arbor Circle's 2025 fundraising activities. This is a living document that changes throughout the year and activities may be modified to fit current circumstances.

Revenue Sources Snapshot

| Revenue Source | Budget Total |
|-------------------------|------------------|
| Grants | \$200,000 |
| Arbor Circle Events | \$75,000 |
| General Giving | \$75,000 |
| Direct Mail Appeals | \$58,000 |
| Third Party Fundraisers | \$22,500 |
| Endowment Giving | \$3,000 |
| Total Revenues | \$433,500 |

Revenue Sources Breakdown

I. Grants

Budget: \$200,000

a. Program and Project Specific Grants

i. Includes Grants for the following programs and projects*:

| Program/Project | Amount |
|---|----------|
| Counseling Services | \$50,000 |
| Community Based Recovery Services: Women's Services | \$50,000 |
| Early Childhood | \$25,000 |
| Other projects* | \$75,000 |

*Other projects related to grants include capital projects/facilities improvements/software updates.

II. Arbor Circle Events

Budget: \$75,000

a. Spring Forward - \$60,000

b. Community Specific Fundraisers - \$15,000

III. General Giving

Budget: \$75,000

a. Gifts not directly associated with an appeal/event - \$70,000

b. All Other - \$5,000

IV. Direct Mail Appeals

Budget: \$58,000

a. Annual (Fall) Appeal - \$55,000

b. Other Direct Mail - \$3,000

V. Third Party Fundraisers

Budget: \$22,500

a. VanDyk Golf Outing - \$15,000

b. Various other 3rd party fundraisers - \$7,500

VI. Endowment Giving

Budget: \$3,000



Fundraising Activities and Strategy

I. Grants

- a. The following objectives apply to all grants:
 - i. Intentional identification and cultivation of potential grant partners for identified priorities.
 - ii. Continued use of fundraising dashboard and grant tracking system to promote shared agency knowledge.
 - iii. Renewed 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.
 - iv. Continued collaboration 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 for individual events and as a comprehensive Regional Sponsorship package for all events. In addition, select program sponsorship opportunities have been added to increase engagement with organizations no longer interested in sponsoring events.

FY2025 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 2025 to coincide with Martin Luther King Jr. Day.
- b. Spring Forward
 - i. This event is Arbor Circle's primary fundraising event and is slated as an in-person gathering in the Spring of 2025.
 - 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 2025.
 - 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. Bridge Open House
 - i. This in-person event provides an opportunity for the community to tour The Bridge and connect with staff on programs and services provided.
 - ii. This event is co-planned by Youth Development Services staff and the Development team.
- e. Thomas J. Bullock Memorial Fund Lecture Series
 - i. This in-person event provides an educational opportunity for substance use professionals to engage in ongoing learning opportunities in honor of Thomas J. Bullock.
 - ii. This event is funded by the Thomas J. Bullock Memorial Fund, created by James and Barbara Haveman.



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%. Includes ongoing, focused messaging on recurring and planned giving.
- ii. Increase consistent touchpoints with current major donors – including private family foundations. For FY25, 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 diversity, including attracting younger donors and donors of color.

b. All Other

This category includes United Way designations and gifts made specifically to Pinwheels for Prevention.

IV. Direct Mail

The Development team will facilitate four donor-specific mailings for FY25*:

- 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. December send date
- iii. LYBUNT and First Time Donor Mailing**
 1. March send date
 2. Retention focused mailing to all first time and LYBUNT (“Last Year But Unfortunately Not This”) donors.
- iv. Impact Report Mailing
 1. May send date
 2. Stewardship-focused mailing to all current donors/sponsors with Impact Report with email and social media components
- v. LYBUNT and First Time Donor Mailing
 1. July send date
 2. Retention focused mailing to all first time and LYBUNT (“Last Year But Unfortunately Not This”) donors.
 - 3.

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

**New for FY25

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 FY25 with a targeted audience.
 - ii. Annual Appeal and Impact Report materials will include Planned Giving language.

VIII. In Kind Support

- a. In Kind Support is a key strategy to both supporting clients with specific needs as well as completing specific facility/capital projects.
- b. In Kind Support is frequently supported through Board Member and community partner connections.

IX. 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/December.
- d. The Impact Report, our largest stewardship initiative, is distributed in May of each year.
- e. First time donors receive a personalized reach out from the Director of Development.

Cultivation Activities

I. Arbor Circle Volunteer Opportunities

The following volunteer opportunities are slated for FY2025:

- 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 FY25 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. This includes incorporating survey feedback from participating staff to ensure events are the best fit for Arbor Circle.
 - iv. Continue to 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 new corporate relationships while maintaining existing corporate giving opportunities, potentially paired with a volunteering component

Marketing and Communications

I. Messaging

In FY25, donor-focused messaging will emphasize the impact of our work, paired with the ongoing focus on diversity, equity, and inclusion and the relationship between equity and wellbeing.

- a. Agency messaging objectives for FY25 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. 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.
 - iii. Increase staff engagement through strategic use of videos and similar content to boost awareness of Arbor Circle and engagement with digital platforms.

II. Digital and Print Materials

- a. Specific needs related to agency materials for FY25, 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 LinkedIn
 - a. Implement Planable as our social media management tool in FY25
 2. Constant Contact
 3. Arbor Circle website
- iv. Build on existing framework for cross-divisional marketing materials for similar programming.

Key Dates

I. **The following are key Development dates for FY25:**

- October 1st, 2024: FY25 begins
- October – December 2024: Holiday Giving
- November 2024 – January 2025: Annual Appeal
- November 29, 2024: Giving Tuesday
- January 16th, 2025: Growing Together
- March, 2025: LYBUNT Mailing
- May 21st, 2025: Spring Forward
- May – June 2025: Impact Report Mailing
- July 2025: Seeds of Support
- July 2025: LYBUNT Mailing
- September 2025: The Bridge Open House
- September 30, 2025: FY25 end