



## FY20-21 Development Plan

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City Garden isn't just a school. We are a community of educators, families, neighbors and friends where children feel safe and accepted. At City Garden, teaching and learning means **redefining education, re-imagining community** and **reinvigorating our world**, and we extend education beyond the four walls of our classrooms. We are a community, not a classroom, and that's why we are unique.

While our charter school status enables City Garden to receive government funding for our K-8 classrooms, many essential programs that define City Garden are not supported by public funds. The things that make us a true community and unique among our peers, such as our Montessori Preschool, our Anti-Bias, Antiracism Program and our Family Support Program, are possible only through the support of our generous donors.

### Development Plan Goal

Based on City Garden's current strategic plan, specific goals and objectives for all aspects of the school were developed by school leaders and personnel, the Board of Directors, and the City Garden community with guidance by Bellwether Education Partners. The overall development goal of the plan is to develop a stable, and growing base of ongoing financial support for City Garden while increasing support for capital needs and expanding impact.

### Plan Timeframe

The development plan covers the 2020-21 fiscal year which runs July 1, 2020 – June 30, 2021.

### Development Vision

- *CG donors view their philanthropy as a duty of being a good citizen/member of the community.*
- *CG will be an institution worthy of consideration of significant wealth transfers, i.e. planned gifts.*
- *CG's brand will be well known by all thought leaders in the movement for equity and social justice.*
- *Philanthropists and corporate donors will turn to CG as THE education solution in St. Louis.*

### Key Initiatives

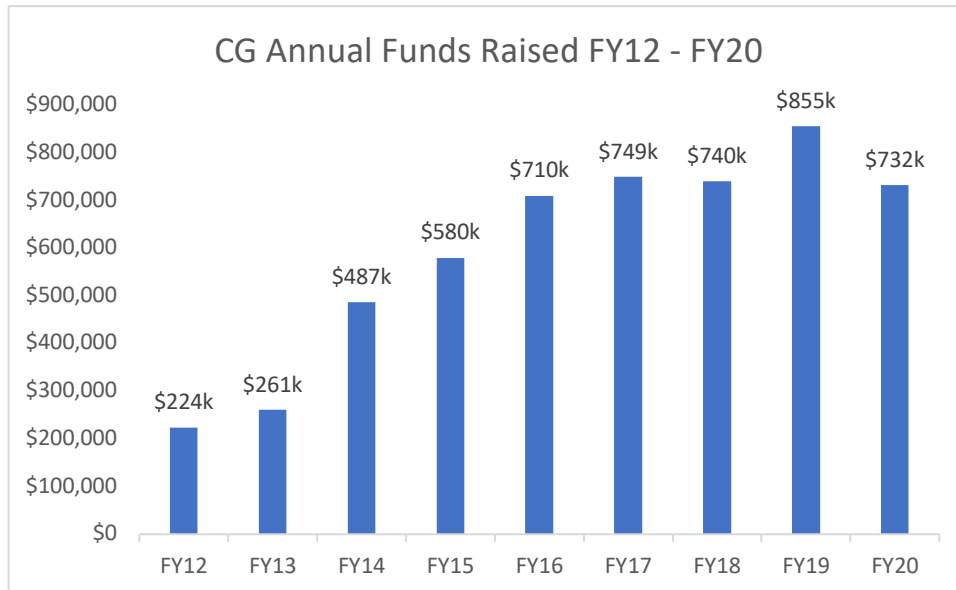
- Raise \$905,000 in philanthropic funds to support City Garden's annual fund (operating budget) by June 30, 2021.
- Complete feasibility study and implement phase one of capital campaign to secure plans and gifts for multi-year campaign to support school growth and expansion. Goal to raise \$1.2M by November 30, 2020 and an additional \$2M by June 30, 2021 through philanthropic funds.
- Cultivate new and existing donors and advance them into annual, mid-level and major gift pipeline.

- As part of efforts to raise annual funds, merge former Annual Gala initiatives with Charidy Campaign project to create new, robust giving campaign that not only retains past donors but garnishes new widespread support.
- Develop comprehensive stewardship plan to engage donors in ongoing relationship.
- Evaluate and analyze content and use of contact database (Bloomerang) to grow giving base and implement contacts/moves management practice of recording.

## **FUNDRAISING**

Fundraising is the top priority of the Development Office at City Garden. Proven fundraising practices and programs will be executed to achieve the annual budgeted goals. While working towards the annual goals, the office will also implement a comprehensive campaign to raise funds for capital and program expansion, while fostering a culture of philanthropy for the City Garden community as a whole.

### **Historical Data**



### **FY20 Fundraising Summary**

Total funds raised, includes Annual Fund and Restricted Giving

*\*Restricted Giving includes gifts for capital and Strategic Plan implementation*

| Fund              | FY20 Total            |
|-------------------|-----------------------|
| Annual Fund Gifts | \$731,830.91          |
| Restricted Gifts  | \$1,860,086.64        |
| <b>Total:</b>     | <b>\$2,591,917.55</b> |

## FY20 Annual Fund Gifts

| Method of Giving                | % of Total | FY20 Total          |
|---------------------------------|------------|---------------------|
| Charidy Campaign                | 20.94%     | \$153,214.06        |
| COVID-19 Family Assistance Fund | 1.28%      | \$9,384.00          |
| Fall Mail Appeal                | 0.69%      | \$5,077.00          |
| Gala                            | 23.72%     | \$173,570.00        |
| Give STL Day                    | 0.11%      | \$815.48            |
| Giving Tuesday                  | 0.71%      | \$5,163.31          |
| Year End Matching Campaign      | 5.40%      | \$39,527.92         |
| Unassigned Corps & Founds Gifts | 40.51%     | \$296,473.21        |
| Unassigned Recurring Gifts      | 2.61%      | \$19,108.00         |
| Unsolicited Gifts               | 4.03%      | \$29,497.93         |
| <b>Total:</b>                   |            | <b>\$731,830.91</b> |

| Source of Giving            | % of Total | FY20 Total          |
|-----------------------------|------------|---------------------|
| Individual Major Giving     | 11%        | \$82,454.06         |
| Individual Mid-Level Giving | 14%        | \$100,678.77        |
| Individual Annual Giving    | 9%         | \$62,024.00         |
| Corporate Giving            | 37%        | \$272,653.60        |
| Foundation Giving           | 29%        | \$214,020.48        |
| <b>Total:</b>               |            | <b>\$731,830.91</b> |

| Detailed Source of Giving, Individuals | % of Individuals Total | FY20 Total          |
|----------------------------------------|------------------------|---------------------|
| Alumni Parent                          | 1.43%                  | \$3,515.00          |
| Board                                  | 17.31%                 | \$42,425.00         |
| Current Parent                         | 17.17%                 | \$42,097.00         |
| Friend                                 | 52.84%                 | \$129,551.52        |
| Graduate                               | 0.02%                  | \$40.00             |
| Grandparent                            | 5.55%                  | \$13,595.00         |
| Internal                               | 0.19%                  | \$466.00            |
| Staff                                  | 5.49%                  | \$13,467.31         |
| <b>Total:</b>                          |                        | <b>\$245,156.83</b> |

## FY21 Goals and Action Plan

Total Funds Goal:

| Fund                                | FY21 Goal             |
|-------------------------------------|-----------------------|
| Annual Fund Gifts                   | \$905,000             |
| Restricted Gifts (Capital Campaign) | \$3,610,000           |
| <b>Total:</b>                       | <b>\$4,515,000.00</b> |

FY21 Annual Funds Goal:

| Method of Giving                | % of Total | FY21 Total       |
|---------------------------------|------------|------------------|
| Enhanced Charidy Campaign       | 44.20%     | \$400,000        |
| Fall Mail Appeal                | 1.66%      | \$15,000         |
| Give STL Day                    | 0.22%      | \$2,000          |
| Giving Tuesday                  | 0.88%      | \$8,000          |
| Year End Matching Campaign      | 5.52%      | \$50,000         |
| Unassigned Corps & Founds Gifts | 40.88%     | \$370,000        |
| Unassigned Recurring Gifts      | 3.31%      | \$30,000         |
| Unsolicited Gifts               | 3.31%      | \$30,000         |
| <b>Total:</b>                   |            | <b>\$905,000</b> |

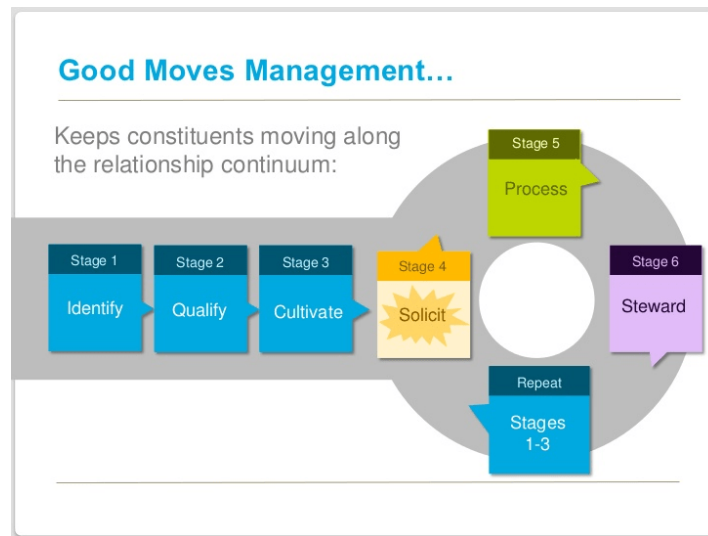
| Source of Giving            | % of Total | FY21 Goal        |
|-----------------------------|------------|------------------|
| Individual Major Giving     | 17%        | \$150,000        |
| Individual Mid-Level Giving | 11%        | \$100,000        |
| Individual Annual Giving    | 6%         | \$55,000         |
| Corporate Giving            | 33%        | \$300,000        |
| Foundation Giving           | 33%        | \$300,000        |
| <b>Total:</b>               |            | <b>\$905,000</b> |

### Annual Fund

**Annual Fund** – The Annual Fund supports City Garden’s general operations budget through gifts from parents, grandparents, Board and committee members, friends, staff, corporations and foundations. The funds primarily support the PreK, ABAR and Family Support Program. This category is also a catch-all for all gifts received not attached to a specific appeal.

- Processes:
  - Direct Solicitation via mail, e-mail and online: Throughout the fiscal year, direct solicitations will be sent to segmented portions of CG’s constituency by USPS mail, e-mail using the Bloomerang portal, or through various social media handles.
  - One-on-one visits: The Chief Development Officer, Development and Communications Associate, and Chief Executive Officer will solicit constituents personally through visits and other means of communication.
  - **Moves Management** implementation: An individualized plan will be created for segmented donor constituents to facilitate relationships and giving to CG. Elements including an annual Solicitation Plan and Cultivation Plan will be created and added to a donor constituent’s record to facilitate regular review and accountability of movement forwarding relationships with donors. [Moves Management Policy](#)
    - Solicitation Plan will include prospective gift amount, timing of gift, type of gift, status of solicitation and last move. [Solicitation Strategy Policy](#)

- Cultivation Plan will include next move to advance the relationship; current temperature of donor engagement; timing of moves; most recent touch/move. [Cultivation Strategy Policy](#)



## **Fundraising Appeals and Sources**

- **Methods of Giving**
  - Fall Mail Appeal segmented by:
    - Grandparents
    - LYBUNTs to fall appeal
    - New\*: Kindergarten Parents/Guardians – now that many are not paying Pre-school tuition, invite and encourage giving prior tuition amount
  - Giving Tuesday
    - December 1, 2020
    - Online appeal in collaboration with national giving day
  - Calendar Year-end solicitation
    - During month of December leading up to 2020 calendar year end
    - Goal = \$25,000 in Matching Donor incentive
    - Goal = \$25,000 new gifts in by Dec. 31, 2020
  - Give STL Day
    - Early May, 2021
    - Online appeal in collaboration with national giving day

| Annual Fund Appeals            | Goal            |
|--------------------------------|-----------------|
| Fall Mail Appeal               | \$15,000        |
| Giving Tuesday                 | \$8,000         |
| Calendar Year-end match appeal | \$50,000        |
| Give STL Day                   | \$2,000         |
| <b>Total</b>                   | <b>\$75,000</b> |

- **Enhanced Charidy Campaign** (absorb past Gala donors)
  - The Charidy Campaign is a targeted online giving campaign in the spring, analogous to St. Louis's *Give StL Day*.
  - **Due to COVID-19 implications and other considerations, City Garden will refocus its annual Gala efforts, donors and promotional campaign to a singular Charidy event.** It is anticipated that the new, combined project will become the signature fundraising event that brings parents, Board members, corporate partners, friends and donors together to support and celebrate City Garden.
    - Past Gala sponsors will be invited to become sponsors of the enhanced Charidy event.
    - Re-brand the project with new name to reflect merge of Gala and prior Charidy campaigns.
    - Calendar date will remain consistent with past Galas to be the first week in March, 2021.
  - Recruit and convene Committee comprised of parents, friends, and Board committee volunteers to assist plan and promote project.
  - Work closely with the CEO and Board of Directors/Development Committee to develop a plan to increase overall visibility, increase major gift donor/prospect cultivation and engagement.

| Enhanced Charidy campaign | FY21 Goal        |
|---------------------------|------------------|
| Sponsors/Matching Gifts   | \$300,000        |
| Day of Gifts              | \$100,000        |
| Total for Project         | <b>\$400,000</b> |

| Sponsor/Matching Gift Size | No. of Gifts | No. of Prospects | FY21 Goal        |
|----------------------------|--------------|------------------|------------------|
| \$100,000                  | 1            | 3                | \$100,000        |
| \$50,000                   | 1            | 3                | \$50,000         |
| \$25,000                   | 1            | 3                | \$25,000         |
| \$15,000                   | 2            | 6                | \$30,000         |
| \$10,000                   | 3            | 9                | \$30,000         |
| \$7,500                    | 2            | 6                | \$15,000         |
| \$5,000                    | 3            | 9                | \$15,000         |
| \$2,500                    | 8            | 24               | \$20,000         |
| \$1,000                    | 8            | 24               | \$8,000          |
| \$500                      | 8            | 24               | \$4,000          |
| \$250                      | 12           | 36               | \$3,000          |
| <b>Total</b>               | <b>49</b>    | <b>147</b>       | <b>\$300,000</b> |

| Day(s) of Gift Size | No. of Gifts | No. of Prospects | FY21 Goal |
|---------------------|--------------|------------------|-----------|
| \$10,000            | 2            | 6                | \$20,000  |
| \$5,000             | 4            | 12               | \$20,000  |
| \$2,500             | 6            | 18               | \$15,000  |
| \$1,000             | 11           | 33               | \$11,000  |
| \$750               | 13           | 39               | \$9,750   |

|              |            |            |                  |
|--------------|------------|------------|------------------|
| \$500        | 20         | 60         | \$10,000         |
| \$250        | 25         | 75         | \$6,250          |
| \$100        | 80         | 240        | \$8,000          |
| <b>TOTAL</b> | <b>161</b> | <b>483</b> | <b>\$100,000</b> |

- **Corporate and Foundation Gifts** (\*Unassigned Corps & Founds gifts under Method of Giving chart) – Gifts secured from foundations and corporations that support ongoing operations or special designations (restricted.)

- **Grants**

- Most gifts secured by foundations, whether a private, family or community foundation, a governmental entity or a corporation's foundation arm, are secured via a formal grant submission process.
- City Garden contracts with a grant writer who assists researching, writing and submitting grants throughout the year.
- Significant Grant applications: \*Note, \$0 in the Projection column recognizes foundations where City Garden has not received consistent funding, therefore we will not count on it for an award in FY21. They are, however, worth submitting and may result in an award for FY21 particularly if able to foster an advisor or trustee relationship.

| <b>Foundation</b>                                         | <b>Deadline</b> | <b>Request</b> | <b>FY21 Projection</b> |
|-----------------------------------------------------------|-----------------|----------------|------------------------|
| The Opportunity Trust – Reinvent Grant                    | 7/31/2020       | \$15,000       | \$15,000               |
| Saigh Foundation                                          | 7/15/2020       | \$10,000       | \$0                    |
| Innovative Technology Education Fund - Lean into Learning | 7/30/2020       | \$4,000        | \$4,000                |
| Bellwether Foundation - full proposal                     | 7/31/2020       | \$15,000       | \$10,000               |
| Boeing Employees Community Fund                           | 8/1/2020        | \$19,000       | \$12,000               |
| Love (John Allan) Charitable Foundation                   | 8/31/2020       | \$10,000       | \$0                    |
| Bayer                                                     | 8/31/2020       | \$40,000       | \$0                    |
| Gateway Children's Charity                                | 9/1/2020        | \$50,000       | \$0                    |
| Wells Fargo Advisors                                      | 9/1/2020        | \$25,000       | \$0                    |
| Buckingham Pillar Grants                                  | 10/1/2020       | \$10,000       | \$0                    |
| Frances R Dewing Foundation                               | 10/1/2020       | \$15,000       | \$0                    |
| Innovative Technology Education Fund - Catapult grants    | 10/31/2020      | \$30,000       | \$30,000               |
| McCall Kulak Family Foundation - update                   | 12/15/2020      | \$5,000        | \$5,000                |
| Jordan Foundation                                         | 12/31/2020      | \$5,000        | \$5,000                |
| Roblee Foundation - LOI                                   | 1/5/2021        | NA-LOI         | NA-LOI                 |
| Philpott Family Foundation - update                       | 1/15/2021       | \$15,000       | \$15,000               |
| Innovative Technology Education Fund - Innovative grants  | 1/31/2021       | TBD            | \$0                    |
| PNC                                                       | 1/31/2021       | \$25,000       | \$0                    |
| MO Charter School Association awards                      | 2/20/2021       | \$10,000       | \$10,000               |
| Van Evera (DeWitt and Caroline) Foundation                | 3/1/2021        | \$10,000       | \$0                    |
| Myson Charitable Trust                                    | 3/1/2021        | \$25,000       | \$0                    |

|                                                  |           |                  |                  |
|--------------------------------------------------|-----------|------------------|------------------|
| Interco Charitable Trust                         | 3/1/2021  | \$10,000         | \$0              |
| Roblee Foundation - full proposal                | 3/27/2021 | \$10,000         | \$10,000         |
| St. Louis Blues 14 Fund                          | 4/1/2021  | \$3,000          | \$3,000          |
| Pott Foundation                                  | 4/1/2021  | \$10,000         | \$7,500          |
| Pettus Foundation - update                       | 4/1/2021  | \$10,000         | \$7,500          |
| Shaw Neighborhood Improvement Association (SNIA) | 4/30/2021 | \$1,000          | \$750            |
| William T. Kemper Foundation                     | 5/1/2021  | \$35,000         | \$35,000         |
| Emerson - Charitable Trust                       | 5/1/2021  | \$80,000         | \$80,000         |
| Incarnate Word Foundation                        | 5/15/2021 | \$10,000         | \$0              |
| Bellwether Foundation - LOI                      | 5/31/2021 | NA-LOI           | NA-LOI           |
| Cigna Foundation                                 | rolling   | \$10,000         | \$0              |
| National Development Council                     | rolling   | \$5,000          | \$5,000          |
| Dana Brown LOI                                   | 8/31/2021 | NA-LOI           | NA-LOI           |
| <b>TOTAL</b>                                     |           | <b>\$517,000</b> | <b>\$249,750</b> |

- **Corporate Gifts**

- Gifts from corporations and small businesses support ongoing operations and special designations. They are solicited via personal solicitations, sponsorship requests and other solicitation methods.
- The highest percentage of CG corporate gifts have been secured via Gala sponsorships in the past. Significant efforts will follow to transfer sponsorship opportunities and benefits to the Enhanced Charidy project to deepen the relationship with our corporate partners.

- **Recurring Gifts**

- Goal = Increase Recurring Gifts by 50%, to raise \$30,000 for FY21.
- Recurring gifts are from donors who give on a monthly basis via the online giving portal.
- For FY21, we will enhance efforts to encourage donors to give on a monthly basis as their importance to financially secure CG is significant.
- Benefits of recurring gifts:
  - Smaller, recurring gifts are often more palatable than a large, one-time gift. Recurring gifts then provide more long-term lifetime value per donor
  - Recurring gifts provide a stable and predictable source of revenue.
  - Regularly support of our mission with the ease of monthly online giving provides convenient experience for donors.
  - Focus on sharing updates with donors instead of asking for new donations. This builds *much* stronger emotional connections with your mission, which helps boost overall retention and lifetime value per donor.

- **Sources of Giving**

- **Individual Major Gifts** - Gifts of \$5000 or more that support ongoing operations or special designations (restricted). The following Goal chart represents gifts to the annual fund only.

| Major Gift Size | No. of Gifts | No. of Prospects | FY21 Goal        |
|-----------------|--------------|------------------|------------------|
| \$20,000        | 1            | 3                | \$20,000         |
| \$15,000        | 1            | 3                | \$15,000         |
| \$10,000        | 2            | 6                | \$20,000         |
| \$7,500         | 4            | 12               | \$30,000         |
| \$5,000         | 13           | 39               | \$65,000         |
| <b>TOTAL</b>    | <b>21</b>    | <b>63</b>        | <b>\$150,000</b> |

- **Individual Mid-Level Gifts** – Mid-Level Gifts range from \$1000-\$4999 that support ongoing operations or special designations (restricted). A goal with Mid-Level and Annual Gift prospects is to consistently encourage donors to reach the next level of giving.

| Mid-Level Gift Size | No. of Gifts | # of Prospects | FY21 Goal        |
|---------------------|--------------|----------------|------------------|
| \$2,500             | 26           | 78             | \$65,000         |
| \$1,000             | 35           | 105            | \$35,000         |
| <b>TOTAL</b>        | <b>61</b>    | <b>183</b>     | <b>\$100,000</b> |

- **Individual Annual Fund Gifts** – Annual Fund Gifts include all gifts \$999 and below. A goal with Mid-Level and Annual Gift prospects is to consistently encourage donors to reach the next level of giving.

| Annual Gift Size | No. of Gifts | # of Prospects | FY21 Goal       |
|------------------|--------------|----------------|-----------------|
| \$500            | 65           | 195            | \$32,500        |
| \$250            | 90           | 270            | \$22,500        |
| <b>TOTAL</b>     | <b>155</b>   | <b>465</b>     | <b>\$55,000</b> |

#### Monthly Goals for Annual Fund Gifts and Pledges

| Month     | Monthly Goal Annual Fund* |
|-----------|---------------------------|
| July      | \$50,000                  |
| August    | \$25,000                  |
| September | \$25,000                  |
| October   | \$150,000                 |

|              |                  |
|--------------|------------------|
| November     | \$150,000        |
| December     | \$150,000        |
| January      | \$20,000         |
| February     | \$25,000         |
| March        | \$150,000        |
| April        | \$85,000         |
| May          | \$50,000         |
| June         | \$25,000         |
| <b>TOTAL</b> | <b>\$905,000</b> |

### **Stewardship Initiatives**

Conduct and manage established practices that thank donors appropriately to their giving level which encourages the continued cycle of giving and encourages increased giving to City Garden. Communication also conveys proper use of the donors' gifts and informs them of how City Garden fulfills its mission through generous gifts.

Implement stewardship/communications plan for corporations and foundations that recognizes ongoing partnership with City Garden. A plan was in early draft stages during FY20 and we will follow up to renew steps to implement.

Stewardship initiatives:

- Annual Impact Report
- Personal outreach to LYBUNTS before Fall Appeal
- Consider Calendar Year-end gifts for limited number of special donors and friends
- Develop broader stewardship touch to special donors and friends during the month of February; tie into Black History Month or Valentine's Day sentiments
- Development Committee-signed Thank You cards
  - Gratitude specifically for recurring monthly donors
  - Enhanced Charidy project appreciation assistance
- Create criteria for recognition and stewardship to donors at levels including Major Gifts, Mid-Level Gifts, and Annual Gifts.
  - City Garden will not implement a formalized Giving Society as it incongruous to the culture of our community.
  - City Garden will appreciate and steward donors to facilitate a growing relationship and partnership with the community that cares for our Mission.
- Corporations & Foundations: develop process for specific recognition based on feedback from C&F representatives for how they want to be recognized and engaged.

### **DEVELOPMENT COMMITTEE**

**Development Committee of the Board of Directors** - The Development Committee is responsible for guiding and overseeing resource development (fundraising) for the school. The duties of the Development Committee as defined under the Board of Directors include:

- Reviewing and approving the school's annual development plan. The development plan is drafted in conjunction with the school's annual budget and is approved no later than June 30 for

the fiscal year that begins July 1. The plan includes goals and strategies for bringing in the resources needed to meet the school's financial needs.

- Reviewing/monitoring resource development outcomes. The Development Committee receives a monthly development report, cash flow statement and a report from development staff regarding progress toward meeting organizational goals.
- Establishing/recommending policies and procedures regarding resource development.
- Overseeing the implementation of resource development activities and programming, including parent giving, major donor cultivation, corporate and foundation contributions, the annual gala, events, communications, stewardship, and tracking of donations and donor information.
- Soliciting volunteer time, determining volunteer projects, and maintaining a volunteer pool to deploy during fundraising preparations and events.
- Providing oversight and support to the Executive Director/CEO, Chief Development Officer, and development staff.

#### Development Committee Members for FY21:

|                        |       |
|------------------------|-------|
| Liz Fathman            | Board |
| Kristen Carroll        | Comm  |
| Luke Carroll           | Comm  |
| Sara Gordon            | Comm  |
| Lynn deLearie          | Comm  |
| Kate McCarthy          | Comm  |
| Rachel D'Souza Siebert | Comm  |
| Deb Flores             | Staff |
| Cassidy Flynn          | Staff |
| Christie Huck          | Staff |

#### Goals for FY21

- Set meeting schedule (second Wednesday of the month, September through May) and identify specific and anticipated responsibilities of the committee for FY21.
- Outline specific tasks for member assistance other than solicitations; consider ways members can support the Development Team through their time and talents.
  - Thank You notes to recurring donors
  - Share social media posts
  - Serve as primary resource for Enhanced Charidy program assistance
  - Personal outreach to engage more people
  - Review and input of Development promotional materials as requested, including capital campaign collateral
  - Assist develop plan for outreach and engagement with young friends and alumni
- Create "elevator speech" regarding Board service for use when promoting CGM.
- Identify new members who may assist with specific assistance as identified by the Development Team.
- 100% giving participation by Committee.

**Database Management** - Evaluate and analyze content and use of contact database (Bloomerang) to grow giving base and implement contacts/moves practice of recording.

- Review structure and revise classifications of giving levels and how gifts are counted to simplify reporting, clarify goals and avoid duplicative efforts.
- Create new Monthly Gift Report that reflects Methods of Giving and Sources of Giving totals
- Gift receipting – Ensure the general gift receipt/thank you is updated regularly and determine segmented groups that require catered receipts/thank you.
- Contact Notes – develop and implement process to record personal contacts with individuals, corporations/foundations to track progress and movement toward advancing donors up fundraising pipeline.
- Create process for updates to contact records, such as business information, birthdays, relationships, etc.

### **Action Plan**

| <b>Action Item</b>                                            | <b>Person Responsible</b>             | <b>Date/ Deadline</b> |
|---------------------------------------------------------------|---------------------------------------|-----------------------|
| Draft Development Plan 2020-21                                | Deb Flores                            | July 24, 2020         |
| Draft Communications Plan                                     | Cassidy Flynn                         | August 21, 2020       |
| Draft Capital Campaign Plan                                   | Consultant Dan Reynolds w/ Deb Flores | July 24, 2020         |
| Draft Grants Calendar                                         | Lynn deLearie                         | July 24, 2020         |
| Assign Top Prospects to CDO, DCA and CEO                      | Flores & Flynn                        | July 24, 2020         |
| Draft new monthly Gifts Status Report                         | Flores, Flynn, Deb Fox                | July 31, 2020         |
| Create Moves Management Plan                                  | Flores & Flynn                        | July 31, 2020         |
| Set Development Committee meeting schedule and goals for year | Flores                                | July 31, 2020         |
| Update gift receipt verbiage                                  | Flynn                                 | August 3, 2020        |
| Annual Impact Report draft                                    | Flynn/Flores                          | August 28, 2020       |
| Draft Stewardship plan                                        | Flores, Flynn and deLearie            | August 28, 2020       |
| Draft Fall annual appeal                                      | Flores & Flynn                        | August 15, 2020       |
| Draft plans for Enhanced Charidy project                      | Flores, Flynn, Fox, deLearie          | August 15, 2020       |

|                                                                          |                              |                           |
|--------------------------------------------------------------------------|------------------------------|---------------------------|
| Stewardship to donors prior to Fall appeal                               | Flores & Flynn               | August 20, 2020           |
| Develop new website                                                      | Flynn                        | August 28, 2020           |
| Gather parent employment data & upload to Bloomerang                     | Flynn/Fox                    | Sept. 15, 2020            |
| Recruit committee members for Enhanced Charidy project                   | Flores, Flynn, Fox, deLearie | Sept. 15, 2020            |
| Drop Fall annual appeal                                                  | Flynn & Fox                  | Sept. 25, 2020            |
| Schedule 8-10 visits monthly                                             | Flores, Flynn & Huck         | Monthly                   |
| Finalize Sponsorship/Matching gifts plan for Enhanced Charidy            | Flores, Flynn, Fox, deLearie | Sept. 30, 2020            |
| Personal thank you notes to Recurring Donors                             | Development Committee        | Oct. 14, 2020             |
| Conduct Enhanced Charidy project committee meetings monthly              | Flores, Flynn, Fox, deLearie | Monthly, starting October |
| Plan Giving Tuesday appeal                                               | Flores & Flynn               | Nov. 1, 2020              |
| Execute Giving Tuesday appeal                                            | Flores & Flynn               | Dec. 1, 2020              |
| Plan EOY Appeal, including secure Matching Gifts                         | Flores & Flynn               | Nov. 10, 2020             |
| Execute EOY Appeal                                                       | Flores & Flynn               | Month of Dec, close 12/31 |
| Plan EOY Stewardship (limited) and February Stewardship (broader)        | Flores, Flynn, Fox, deLearie | October 15, 2020          |
| Execute EOY Stewardship (limited)                                        | Flores, Flynn, Fox, deLearie | Dec. 3-11, 2020           |
| Secure all Enhanced Charidy sponsorships/matching gifts                  | Flores, Flynn, deLearie      | February 1, 2021          |
| Secure all Enhanced Charidy testimonial participants and incentive items | Flores, Flynn, deLearie      | February 1, 2021          |
| Execute February Stewardship (broader)                                   | Flores, Flynn, Fox, deLearie | Week of February 1st      |
| Execute Enhanced Charidy project                                         | Flores, Flynn, Fox, deLearie | Week of March 1, 2021     |
| Enhanced Charidy project personal                                        | Development Committee and    | March 10, 2021            |

|                                                    |                              |                 |
|----------------------------------------------------|------------------------------|-----------------|
| gratitude                                          | Charidy Committee            |                 |
| Cultivate rising Kindergarten families             | Flores & Flynn               | April-May, 2021 |
| Initial Draft FY22 Development Plan                | Flores                       | April 15, 2021  |
| Follow up on outstanding pledges                   | Flores & Flynn               | May 1, 2021     |
| Appreciation for Dev. and Charidy committees (TBD) | Flores, Flynn, Fox, deLearie | May 2021        |
| Finalize FY22 Development Plan                     | Flores                       | June 1, 2021    |

**Comprehensive Campaign** – City Garden will continue implementing plans for a comprehensive campaign to invite donors to support our vast program and capital expansion. The campaign will span multiple fiscal years.

- **New Funding Needs and Objectives-** City Garden is embarking on a transformative time of growth, expanding not only the school program but creating a Training Institute and Center for Equity.
  - Renovation and equipping 56,000 sq foot warehouse building to expand flagship school housing 1<sup>st</sup> – 8<sup>th</sup> grade programs and specialty programs
  - Curriculum development and codification
  - Teacher coaching and development
  - Launch City Garden Montessori Institute
  - Increase student capacity
  - Achieve financial self-sustainability
  - Center for Equity initial funding
- **Completion of Feasibility Study** – The initial step of conducting a feasibility study commenced during FY20. The onset of the COVID-19 pandemic forced a delay in conducting the feasibility study in the timeframe as planned.
  - Continue work with Consultant - The Development Team is working with Dan Reynolds of Holmes, Radford and Reynolds (HRR) who will complete the feasibility study while building organizational capacity and assist annual fund planning.
  - Working with HRR over June-July 2020, work on capacity building and refine roles within the development team/structure, evaluate current annual fundraising activities, refine FY21 annual fund plan, Case for Support refinement, and advanced donor research and cultivation.
- **Campaign and Pledge Timetable** – It is anticipated that the campaign will take thirty-one (31) months to complete.
  - Organizational Capacity Building & Annual Fund Planning: 2 months, June-July 2020
  - Campaign Readiness and NMTC Match: 7 months, August 2020-February 2021
  - Leadership Gifts: 19 months, March 2021-September 2021
  - Community Gifts Phase: 3 months, October 2022-December 2022

- **Goal** to raise \$1.2M by November 30, 2020 and an additional \$2M by June 30, 2021 through philanthropic funds. The complete plan including Goals, Objectives, Giving Scale and Campaign Structure may be accessed in the Holmes, Radford and Reynold's [Campaign Plan and Guide](#).

## **Communications Plan**

### **Annual Goals**

- 1) Through the staff retreat process, plug-in to any efforts to systematize and streamline internal staff communications.
- 2) Sustain and leverage the [Communications Calendar](#) which will detail the use of platforms and messaging throughout the entirety of FY21 in accordance with appeals, events, initiatives, programs, and campaigns.
- 3) Develop and leverage a roster of City Garden's communications platforms and corresponding documentation. The roster will also serve as the hub for sign-in credentials, and will be available to parties deemed necessary.
- 4) Ratify City Garden's Brand Guide, which details the use of City Garden branded logo, graphics, color, and typefaces/fonts.
- 5) Develop a dashboard of goals and tactics for expanding City Garden's audience and increasing overall engagement; increase website traffic from XX to XX, build email database, develop dashboard for click rates/engagement.
- 6) Develop brand, branding, and brand identity for City Garden's Comprehensive Campaign.
- 7) Launch and sustain City Garden's new website and protocol work by developing documentation and systems for management.