



**i-5 Freedom Network's  
2021-2022  
Strategic Development Plan**

## **Background Summary**

i-5 Freedom Network has begun an exciting new phase of growth which calls for the creation of a more structured and intentional Development strategy. This Strategic Development Plan builds on the work undertaken by the SWOT team in March 2021. That assessment brought to light many of i-5's Development strengths and shortcomings and made clear the need for a well-articulated blueprint that will help the organization meet its current and future fundraising needs. As an organization, i-5 has displayed an unflinching desire for best practices and honest self-assessment. These traits will be the driving force behind the strategies set forth in the following pages, which serve as an articulation of the intentions described in the i-5 Freedom Network Strategic Business Plan 2021-2023.

## **Goals and Objectives**

The primary goal of this Development Plan is to provide the funding necessary to carry out i-5's strategic organizational plan, and meet programmatic goals. It has been determined that meeting those goals will require an organizational revenue of \$330,000.

Thus, the aim of this plan is to provide a detailed strategy to meet or exceed that fiscal requirement. In order to meet this goal, i-5 Freedom Network must meet the following objectives:

- Build a Development infrastructure that is capable of handling a fundraising operation of the size and scope laid out by this plan
- Establish scalable fundraising systems capable of providing maximum efficiency for a relatively small Development staff
- Provide easy and concrete methods for cultivating and maintaining relationships with donors and prospects
- Reach outside i-5's current core donors to build an ever-expanding assortment of prospects
- Operate in a professional and entrepreneurial manner, utilizing Development best practices, ambitious goals, and measurable metrics

## **Assumptions**

In formulating this plan, i-5 Freedom Network is operating under the following assumptions:

- i-5 has begun to develop a strong base of friends, prospects, and donors during its history, but has lacked the procedures and/or infrastructure to effectively maximize those contacts
- Our Board of Directors is committed to i-5's Development Plan

- The area of greatest need for i-5 is in developing a robust grant calendar, and an individual giving/membership program.
- The current fundraising environment will be a challenging one due to the state of the economy, which has led to dwindling savings, profits, and investment portfolios among our individual and corporate donors and falling endowments among those foundations that could support us financially.
- Our mission is a vital and compelling one, worthy of philanthropic financial support.

## **Types of Funding**

It is important, at this point in the plan, to differentiate between the various funding streams that provide (or could provide) revenue for i-5:

- Charitable Fundraising – This includes all money raised from philanthropic sources
  - Individual Giving – Money raised from individuals will be the primary focus of i-5’s development efforts.
  - Foundation/Corporate/Governmental Giving – Money raised via grant writing comprises a significant portion of our fundraising efforts, but is not our primary focus.
  - Events – Money raised from fundraising events will again become (post-Covid) a key part of our plan.
- Earned Income – Money paid to i-5 in exchange for services rendered (not Development-related)
  - Hotels, management companies, and other non-grant corporate payments.
  - Way 2 Work collaborative partnerships

***There are many pieces of the Development puzzle that fit together to create successful fundraising.***

***The following components are integral to i-5’s ongoing financial success:***

## **Donor Database**

i-5 has established Network for Good as the database to be used for tracking donors and prospects. The reporting capabilities, relationship-building functions, and prospecting tools are adequate to meet the needs of an organization of our current and future size; however, protocols have to be established for use of the database and past data must be migrated in order for such use to be helpful to the organization.

## **Action Steps**

- Determine database access and protocols (Brenda, Alyx, JJ. Deadline)
- All necessary staff and volunteers to be trained on database usage (Key People. Deadline)

- All relevant past and present information will be integrated into the database (Key People. Deadline)

### **Uniform Prospect and Donor Tracking Procedures**

i-5 must have standard practices in place for handling new prospects and donors, including appropriate procedures that may be used by the Board, committees, affinity groups, and event hosts. These procedures will ensure that all prospects and donors are entered into our database and cultivation systems with the appropriate level of information allowing for correct and efficient follow-up to be made. Therefore, i-5 should develop procedures and/or forms to be used in handling new prospect and donor contacts. These procedures cannot be fully implemented until after our donor database is in use.

#### Action Steps

- Develop necessary memos and forms for prospect and donor tracking (Key People. Deadline)
- Share prospect and donor tracking procedures with the Board and other impacted parties (Key People. Deadline)

### **Development Communications Strategy and Timeline**

It is imperative that i-5 strengthen its program of regular communications with donors and prospects. This effort will be comprised primarily of non-solicitation communications for the purposes of building and stewarding our donor/prospect relationships, along with a few well-timed asks. Research shows that donors who are contacted and communicated with using a variety of online and offline formats give bigger gifts and give more often.

Thus, our communications strategy should utilize the following varied tactics:

- Snail Mail: Donors will receive at least one hand written thank you note per year. Additionally, i-5 will plan and execute a once-yearly post card solicitation.
- Email: i-5 will maintain a program of regular email communications; this will be the primary means of regular communication with supporters.
- Phone Calls: Donors at appropriate levels should be thanked by Board members, via phone, for their gifts after they are received. Also, donors at every level should be thanked, via phone, for their support at an appropriate time during the year, during a “Connect with Our Donors” period targeted specifically at lower level donors that we don’t often talk with.

#### Action Steps

- Determine which level of donor receives which form of thank you (Key People. Deadline)
- Determine who will write thank you notes and make thank you phone calls (Key People.

Deadline)

- Design inaugural post card and articulate mailing plan (Key People. Deadline)
- Mail post card (Key People. Deadline)
- Calendar time and articulate details for a “Connect with Our Donors” event (Key People. Deadline)
- Host “Connect with Our Donors” event (Key People. Deadline)

### **Board Development Training**

As is evident in this plan, the active and informed participation of the Board of Directors will be integral to our ultimate fundraising success. In addition to their current fundraising activities on behalf of i-5, members of the Board could be asked to make donor cultivation calls, help populate both non-ask and ask fundraising events, hold events and expand our donor and prospect potential.

Board members may have the desire to learn more about fundraising best practices and to hone their fundraising skills through additional development training. In that light, Board training opportunities will be presented at already-scheduled meetings as well as extracurricularly.

**Note:** Traditionally, time is allotted at organizations’ Board meetings for Development reporting. While the Board should receive those regular Development updates, Development time at Board meetings should be more heavily weighted towards activities that include reviewing prospect lists and assigning contacts; discussing and assigning donor/prospect cultivation calls; brainstorming contacts, events, and targets; and other items that will lead to an increased donor and prospect pool and additional dollars raised.

### Action Steps

- Discuss board training schedule and goals and add relevant dates to the overall Development Plan timeline (Key People. Deadline)
- Identify at least 3 possible out-of-meeting training opportunities to present to Board members (Key People. Deadline)

**Case for Support (Story Cards - [https://543e91b1-3d85-4af3-b6ac-403a99078dba.filesusr.com/ugd/7fdc32\\_f505e300f74d4885aabf91f7dd581b3d.pdf](https://543e91b1-3d85-4af3-b6ac-403a99078dba.filesusr.com/ugd/7fdc32_f505e300f74d4885aabf91f7dd581b3d.pdf))**

Central to many future fundraising activities is the development of a strong case for support – with several case statements highlighting both factual and emotional reasons for individuals, corporations, government agencies and foundations to partner with i-5. These case statements must provide client anonymity while at the same time drawing donors into supporting our efforts. Similarly, the case for support and statements must provide a factual basis for our funding needs while being generic enough to be used in a wide variety of fundraising opportunities. Effective case statements will include compelling stories of the work that we do, coupled with evidence of the societal benefit of our work and the efficient stewardship of donor resources. Case statements should be able to be used by board members, staff members, friends and others who are interested in generating support for our work.

Action Steps

- Work with i-5 program staff to generate necessary information to build individual stories (Key People. Deadline)
- Finalize case for support and 2-4 initial case statements (Key People. Deadline)

**Non-Ask Events**

Many nonprofit service providers have the opportunity to host non-ask tour events to prospective donors. Although i-5 does not provide the type of services that lend themselves well to these events, we should consider developing some sort of non-ask event program that can be used as a first point of contact with potential funders.

Action Steps

- Explore the possibility of hosting non-ask events in locations such as local law firms, supporters' offices, Chamber of Commerce meetings, local corporate “lunch and learn” sessions, Board member homes, etc. (Key People. Deadline)
- Establish schedule of 2021/2022 non-ask events, with goal of holding 2-3 events. Key People. (Deadline)
- Develop strategy for moving prospects to each event. (Key People. Deadline)
- Develop scripts and materials for non-ask events. (Key People. Deadline)
- Hold first non-ask event. (Key People. Deadline)

**The following components will serve as the direct drivers of income for i-5:**

**Membership Campaign**

The key fundraising innovation for i-5 during the 2021-2022 fiscal year will be the introduction of a multi-year membership campaign program aimed at individual donors. The purpose of this program will be to emphasize the impact of modest, recurring donations.

i-5 will develop 3-4 giving levels, along with an appropriate number of recognition methods for each level. Similarly, i-5 will develop web-based and collateral materials explaining the program, including pledgecards asking for a three-year commitment to one of these levels, and will brand the program with an appropriate name and logo.

**Action Steps**

- Create annual giving program levels, brand, logo, etc. (Key People. Deadline)
- Create collateral materials for annual giving program (Key People. Deadline)
- Develop master list of membership campaign prospects for launch (Key People. Deadline)
- Decide on launch structure and event/meeting planning requirements (Key People. Deadline)
- Mail invitations to launch events and/or schedule launch solicitation meetings (Key People. Deadline)
- Hold Membership Campaign Program Launch (Key People. Deadline)

**Fundraising Events**

In the bygone, pre-Covid era, i-5 hosted an annual “Be a Big Cheese” event. It was an “un-gala”, less formal gathering of supporters. While the future of in-person gatherings is looking better all the time, there is still too much uncertainty to calendar a specific event at this time. However, there is definite interest in hosting a fundraising and friend-raising event in the near future.

**Action Steps**

- Explore event options (Alyx, Carlie, Jodie. Deadline)
- Present feasible options to the Board for guidance (Key People. Deadline)

**Foundation Giving**

i-5 is planning to more aggressively pursue grants as a source of funding for our programs and expansion. Our Development Consultant has crafted a grant template that can be easily customized per the interests of

prospective funders in order to tell about our work and highlight the benefits of financial partnership. Additionally, we are in the process of creating a list of new, prospective funders to approach. This prospect list will be updated as more funding opportunities present themselves. As it is a fluid document, the list should be reviewed by i-5 staff and Board members on a regular basis and mined for any personal/professional contacts that could in any way increase the likelihood of a favorable grant review.

To facilitate new funding partnerships, and promote larger and more sustained gifts, i-5 should designate staff and/or Board members who can meet with grantors and grant prospects to showcase our programs and build deeper relationships with key decision makers. Additionally, any relevant “meet the funder” events should have an i-5 representative in attendance.

#### Action Steps

- Create 2021-2022 foundation giving plan, including detailed prospect lists and timelines (Jenni Frank. Deadline)
- Set proposal submission calendar and integrate deadlines into greater Development Plan (Jenni Frank. Deadline)
- Review list of current prospects with Board in order to uncover any potential connections (Brenda, Jenni. Deadline)
- Identify Board members who will reach out to potential funders AND identify which funders will be contacted in the next 6 months (Key People. Deadline)
  - Repeat this step every 6 months

#### **Earned Income**

A portion of i-5’s annual income comes from corporate contracts – primarily from hotels. They pay i-5 directly in exchange for the provision of training services. While this income does not fall directly under the purview of Development, fundraising efforts from the hospitality industry should be mindful of these partnerships.

#### Action Steps

- Identify corporate clients that also have philanthropic opportunities (Key People. Deadline)

#### **Government Funding**

Currently, the City of San Clemente is i-5’s only active potential government funding partner. While the most recent grant funding opportunity was disrupted by a shift in funding to corona virus emergency funding, we are currently awaiting the results of a pending proposal to the city. i-5 should consider other South County cities for



potential partnership.

#### Action Steps

- Review current and potential local government funding (Key People. Deadline)
- Develop list of government officials to target for relationship-building and a plan for doing so (Key People. Deadline)

#### **Social Media**

i-5 is in the process of professionalizing and maximizing its social media presence. While our social media accounts play a larger role in the organization than just serving as portals to fundraising, that *is* one of their functions. As such, within our social media strategy we should articulate the fundraising impact we expect those accounts to have. Additionally, in service to our fundraising efforts, our social media manager/content creator should be kept abreast of our current and prospective funders in order to ensure that, whenever possible, we are connected with them via social media. Orange County organizations that serve the nonprofit sector (such as One OC, OC Grantmakers, OCCF, Fieldstone Leadership Network, Orange County United Way, and OC Nonprofits Staying Connected) should be among our social media connections as well.

Social media's role in i-5's fundraising also extends to specific donation campaigns. Those asks need to be developed and calendared. They can take the form of independent campaigns and/or in conjunction with larger social media actions (The OC Register's annual Giving Day event, for example).

#### Action Steps

- Articulate a list of Development-related social media accounts to follow (Jenni. Deadline)
- Review current and prospective funders list so that the social media content creator can check for related social media accounts (Jenni, Alyx. Deadline)
- Plan and calendar social media-based donation requests (Key People. Deadline)

#### **Planned Giving**

During the current fiscal year, i-5 should remain focused on increasing its individual prospect base, maintaining a comprehensive donor communications program, and launching a membership campaign, as well as increasing grant-based giving. As our programs increase and strengthen, i-5 should be prepared to solicit planning gifts and bequests from our friends and supporters.

While this planned giving program will not be a major focus of our fundraising efforts during the coming year,

we can be prepared to aid those who want to include i-5 in their wills, even if we are not yet marketing this avenue for supporting our work. The best way to be prepared is to create a short document, with the help of our supporters in the legal and non-profit development fields, detailing the options for making a bequest to i-5.

#### Action Steps

- Work with supportive professionals to create a simple document detailing the options for making a bequest to i-5 and ensuring that we have the necessary capabilities to accept such bequests (Deadline)

#### **Hosted Event Program**

Many organizations have success with “hosted events,” small house parties and other gatherings held by Board members and supporters to raise money and generate interest. These small events serve three purposes: (1) raising money, (2) raising awareness, and (3) generating new prospects for future fundraising efforts.

i-5 could develop a scalable program for encouraging and supporting our friends to host events on our behalf by creating an “event in a box:” a handbook detailing how to hold an event on our behalf, along with the supporting materials a prospective event host will need in preparing for their event.

In the past, i-5 has taken part in peer-to-peer events on Facebook, Blaze Pizza Nights, and other hosted events from which we benefit. As soon as is feasible, we should re-engage in these types of events, as well as planning our own open house events to be hosted in our office space, to which Board members can bring friends and potential supporters.

#### Action Steps

- Research potential events from which we can financially benefit (Key People. Deadline)
- Create a scalable outline for hosting an “i-5 benefit” event (Key People. Deadline)
- Articulate a plan for open house events and determine feasibility and timeline (Key People. Deadline)

#### **Miscellaneous Opportunities**

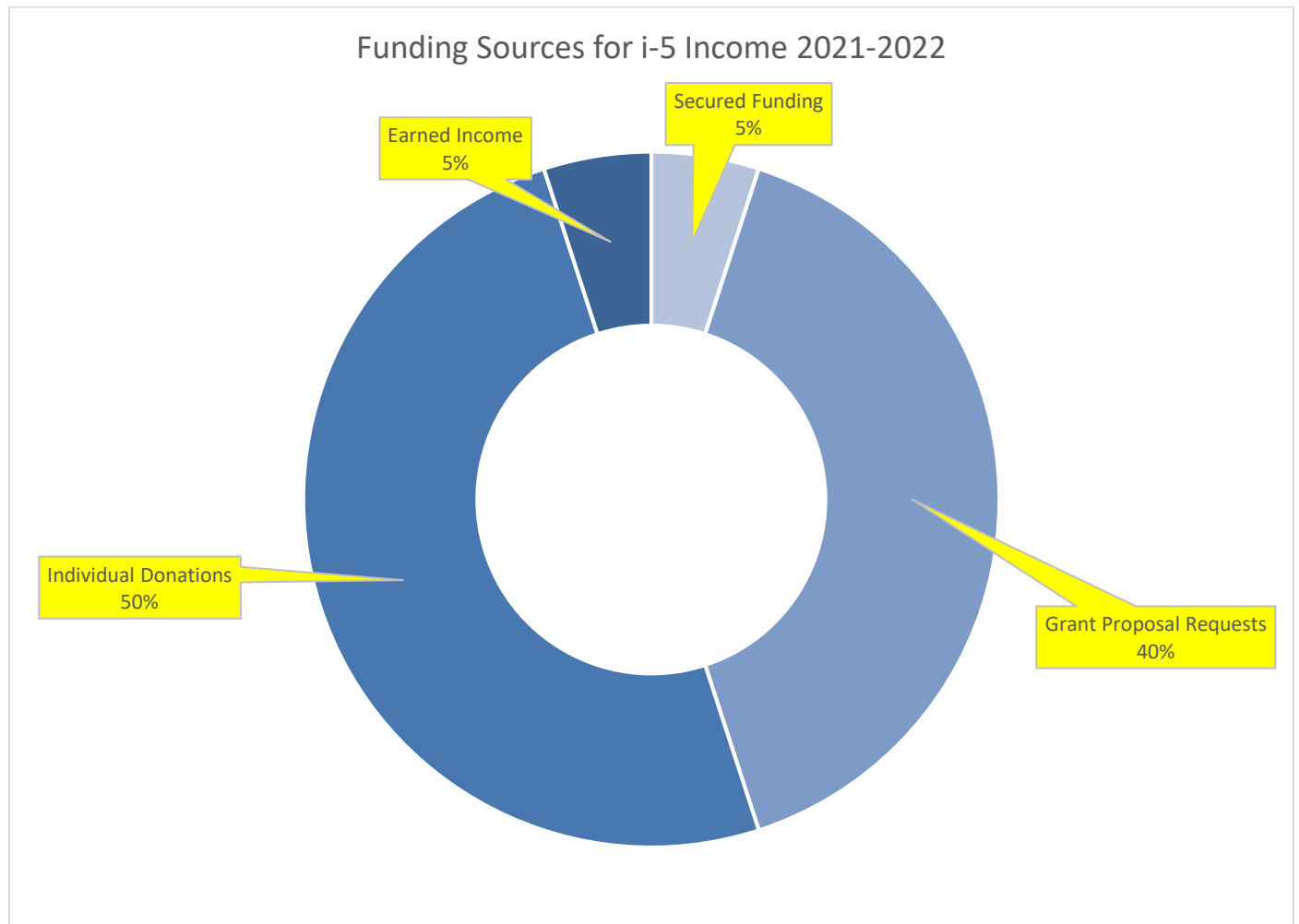
In addition to the fundraising tactics laid out above, i-5 should remain mindful of seizing fundraising opportunities as they arise. We should listen to the suggestions of our stakeholders and friends, and be prepared to implement some of the many good ideas that cross our path.

#### Action Steps

- Determine possible opportunities for “partner” agency status, participatory fundraising events, and other community-based connections (Key People. Deadline)

## Fundraising Needs and Goals

For the 2021-2022 fiscal year, the i-5 budget has estimated total expenses at approximately \$330,000. Below is a chart that represents anticipated income by broad-based categories.



## **Consolidated Action Step Timeline**

**\*April, 2021**

**\*May, 2021**

**\*June, 2021**

**July, 2021**

**August, 2021**

**September, 2021**

**October, 2021**

**November, 2021**

**December, 2021**

**January, 2022**

**February, 2022**

**March, 2022**

**April, 2022**

**May, 2022**

**June, 2022**