

MAJOR DONOR BUSINESS PLAN FY 2008
PRELIMINARY PLAN – January 26, 2007
David Warren

GOAL:

The goal of the Major Donor program is to secure gifts of \$1,000, and greater, for the operating budget, designated as the *Leadership Circle*, as well as fund capital and endowment projects through donor identification, cultivation, solicitation and stewardship.

STRATEGIC OBJECTIVES:

Increase the number of annual Leadership Circle contributors with a specific emphasis on augmenting the number of annual gifts of \$5,000 and greater.

Provide the appropriate level of cultivation and donor interaction for all Leadership Circle members based on donor's indicated preference.

Secure additional sizable gifts for restricted purposes through cultivation of specific donors, utilizing informative and engaging projected-related materials.

Develop a "major gifts" mindset, i.e., that a present donor represents the best opportunity for a (larger) gift, and those activities which focus on the continuum of giving should be favored.

Continually research and identify Leadership Circle prospects for the Board of Directors to cultivate, solicit and steward major gifts.

Refine and enhance the work of the MGI/Development Committee of the Board. Ensure all participants remain actively engaged in this on-going process of identifying and cultivating prospective Leadership Circle donors. Grow MGI/Development Committee as appropriate.

SUCCESS MEASURES (Tactical Objectives):

The income target is \$325,000 – an increase of \$15,000 over FY07 projected revenue...after removing \$30K in one-time gifts.

Strive to maintain Leadership Circle retention rate of at least 92% through cultivation and relationship development.

Meet regularly with MGI/Development Committee members to review progress on Leadership Circle prospects using "moves" management.

Participate in all Nominating Committee meetings of the Board of Directors to assist in identifying potential Board members who are prospective Leadership Circle members and/or effective fundraisers and knowledgeable of the Vermont and/ or Montreal philanthropic community.

Welcome at least 20 new Leadership Circle contributors in FY 2008.

Set up quarterly MGI meetings to review "moves" on the Top Ten list and reviewing upcoming renewals and lapsed members.

Strive for a minimum of 3 donor or prospect visits, on average, per week.

Secure one large restricted gift (approx. \$250,000).

Hold at least six, or possibly as many as eight, cultivation parties for major donors and prospective major donors hosted by individual board members or VPT. Tentatively scheduled:

| | |
|--------------------------------------|------------------|
| Silberfarb Reception – Norwich | Mid-Summer 2007 |
| Marshall/Eastman Reception – Peacham | Late-Summer 2007 |
| Dave Taplin reception – Norwich | Fall 2007 |
| Joan Ivory's party – Montreal | Fall 2007 |
| Fall Preview Reception | Fall 2007 |
| Producer's Reception - VPT | Spring 2008 |

Additional potential receptions TBD - One in Chittenden County, One in Rutland/Manchester area.

Encourage the involvement of Board Members in cultivation events. Encourage board members to host events. Target: each board member attends 3 of the cultivation events tentatively scheduled for FY 2008. Keep track of board attendance.

REVENUE HISTORY – LEADERSHIP CIRCLE

| YEAR | ACTUAL REVENUE | Δ \$ from Previous year | % Δ |
|------|-----------------------|-------------------------|--------|
| FY98 | \$180,238 | +\$44,639 | +33% |
| FY99 | \$155,924 | -\$24,314 | -13.5% |
| FY00 | \$201,622 | +45,698 | +29% |
| FY01 | \$228,303 | +\$26,681 | +13% |
| FY02 | \$262,206 | +\$33,903 | +15% |
| FY03 | \$271,875 | +\$9,669 | +4% |
| FY04 | \$278,913 | +\$7,038 | +3% |
| FY05 | \$284,004 | +\$5,091 | +1.8% |
| FY06 | \$292,561 | +\$8,557 | +3% |
| FY07 | Projected - \$310,000 | +\$17,439 | +6% |
| FY08 | Projected - \$325,000 | +\$15,000 | +4.8% |