



Annual Financial Development Plan

SAMPLE SCHOOL

**ANNUAL FINANCIAL DEVELOPMENT PLAN 2019-2020
SAMPLE SCHOOL**

OPERATING FUND REQUIREMENTS (CONTRIBUTIONS):

The sources of revenue for the school operating budget include:

	2019/2020
Tuition & Fees	\$4,770,480
Fundraising Revenues	\$1,150,000
Donation Revenues	\$460,000
Auxiliary Revenues	\$458,895
Academic Revenues	\$155,095
Athletic Revenues	\$243,930
Total	\$7,238,400

Tuition and fees

This includes actual tuition dollars (before discounts or tuition assistance is applied), application fees, student activity fees and district transportation fees.

Fundraising Revenues (Annual Fund)

This includes contributions and fundraising income that is generated through the Development Office. It includes the annual auction and other development sponsored events. Contributions will be sought from individuals (alumni, parents, grandparents, and others), corporations (employer matching and outright gift donors), and foundations.

Donation Revenues

This includes student sponsorship revenue and restricted donations.

Auxiliary & Other Revenues

This includes church subsidies, food services revenue, facility rental revenue, interest revenue and other.

Academic Revenues

This includes all class fees, curriculum revenue, and department fundraising.

Athletic Revenues

This includes all ticket sales, concessions, spirit pack fees, fundraising revenue, and golf tournament revenue.

DEVELOPMENT STRATEGIES:

A variety of strategies will be used to raise these funds, summarized as follows:

Fall Auction Revenue*	\$215,000
Open House	\$50,000
Major Gifts	\$150,000
Make a Difference Giving	\$50,000
Create an Opportunity Scholarship	\$400,000
Direct Appeals Revenue	\$75,000
Board/Staff Giving	\$125,000
Ag Expo Revenue	\$35,000
Vehicle Raffle Revenue	\$50,000
Total	\$1,150,000

**Includes both donations & table sponsorships and tickets & events revenue.*

I. Strategy: Fall Auction Event

- a. SAMPLE SCHOOL Annual Dinner & Auction, "Under the Stars," will be held on October 5, 2019. This serves as the school's largest single event of the year.
- b. Board members and current donors will serve as hosts and assist with inviting other SAMPLE SCHOOL families to the event.
- c. Majority of money raised at the event is dedicated to the general fund, with a portion of the proceeds designated to "Create an Opportunity Scholarship" Fund.
- d. Appreciation and networking efforts will follow.
- e. Donor and attendees will be added to on-going communication and fundraising efforts.

Target Audience: Individuals (parents, alumni, grandparents, donors, staff).

Timing: October 5, 2019.

Fundraising Goal: \$215,000 including all revenue sources.

Projected Expense: \$30,000 for dinner, decoration, rentals, materials, etc.

II. Strategy: Open House

- a. SAMPLE SCHOOL will host a spring event named, "Open House"
- b. It will be held on Saturday, April 25, 2020.

- c. Advertisements will be sold for the printed program which will raise money designated for the Eagle Fund.

Target Audience: Current families, potential families, grandparents, donors and community members.

Timing: Event occurs in April.

Fundraising Goal: \$50,000.

Projected Expense: \$9,000 for dinner, supplies and printed materials.

III. Strategy: Major Gifts

- a. Major Donor prospects will be identified through past giving and existing relationships with staff and board.
- b. Wealth screening research may be used on selected names.
- c. A "scale of gifts" starting at \$5,000 will be prepared in advance.
- d. Prospects will be rated and categorized as Platinum, Gold, Silver and Bronze.
- e. Personal visits will be made to individuals, corporations and foundations, presenting specific amount requests of \$5,000 and above using written proposals.
- f. Solicitation will be preceded by obtaining information about the prospective donors and his/her/their interests in SAMPLE SCHOOL'S needs.
- g. Personal visits will be conducted by _____ and Fundraising Committee members at year-end and throughout the balance of the school year.
- h. Appreciation and networking efforts will follow.

Target Audience: Individuals (parents, alumni, grandparents, major donors, corporations and foundations.)

Timing: On-going, based on individual plans.

Contribution Goal: \$150,000.

Projected Expense: \$2,500 for research, travel, meals and entertainment.

IV. Strategy: Make a Difference Giving

- a. The Make a Difference program is designed to encourage current parents to commit to a contribution level over and above their tuition on an annual basis.
- b. Program will be launched by direct mail or email contact to parents in the fall of 2019.

- c. In the future, effort will be placed on receiving these giving commitments at the time of re-enrollment in the spring each year.

Target Audience: Current tuition paying families.

Timing: Fall 2019 and spring 2020.

Contribution Goals: \$50,000.

Projected Expense: N/A.

V. Strategy: Create an Opportunity Scholarship

- a. Create an Opportunity provides the main source of financial assistance for deserving families on an annual basis.
- b. Funds are raised throughout the year, starting with an opportunity to give at the Fall Dinner and Auction.
- c. Personal visits will be made to individuals, corporations and foundations, presenting specific amount needed for the scholarship fund throughout the year.
- d. All SAMPLE SCHOOL families and staff will be made aware of the need and given the opportunity to set up one-time or recurring gifts as part of the "Make a Difference" giving program.
- e. Appreciation and networking efforts will follow.

Target Audience: Individuals (parents, alumni, grandparents, major donors, board, staff).

Timing: On-going.

Contribution Goal: \$400,000.

Projected Expense: No projected expense.

VI. Strategy: Direct Appeals Revenue (Letters)

- a. Calendar Year End letter will be mailed to all SAMPLE SCHOOL families and friends highlighting the Fund and/or a specific need.
- b. The appeal will have a clearly stated fundraising goal and action step to respond.
- c. A second, fiscal year end letter may be added and will focus on year end need
- d. Businesses may be included in these appeals as well.

Target Audience: Individuals (parents, grandparents, names on mailing list).

Timing: Late November-early December 2019.

Contribution Goal: \$75,000.

Projected Expense: \$3,000 for printing and postage.

VII. Strategy: Board/Staff Giving

- a. All current board members, faculty and staff will be provided the opportunity to make a gift or pledge early in the school year. The goal is 100% participation.
- b. Faculty and staff will be given the option of a recurring gift through payroll deduction.

Target Audience: Current board members, faculty & staff.

Timing: Fall 2019 and ongoing.

Contribution Goals: \$125,000.

Projected Expense: N/A.

VIII. World Ag Expo Revenue

- a. Operate food booth during the 3-day event, utilizing student and parent volunteers.
- b. Our presence at the event provides marketing and publicity for the school as well as generates funds which are designated for the fund
- c. Wide ranging exposure for the school.

Target Audience: 100,000+ attendees of the World Ag Expo.

Timing: February 11-13, 2020.

Contribution Goals: \$35,000.

Projected Expense: \$23,000.

IX. Strategy: Vehicle Raffle Revenue

- a. Generate funds to be designated for the Eagle Fund, by selling raffle tickers for a vehicle the school purchases at cost.
- b. Ticket sales will be promoted through social media, website, SAMPLE SCHOOL events and through marketing materials posted throughout the community.

Target Audience: Grandparents, current and former parents, church members, alumni and members of the community.

Timing: April.

Contribution Goals: \$50,000 (net after expenses).

Projected Expense: N/A.

RESOURCES REQUIRED

In order to carry out this annual financial development plan, the following resources will be required:

Staff:

- a. A significant portion of the Superintendent's time
- b. A full-time development director (to oversee all public relations, marketing, student recruitment and fund raising). This is not in the budget for 2019-20 but should be considered as soon as feasible.
- c. Clerical or administrative support as needed

Volunteers:

- a. Board Members (including Fundraising Committee)
- b. Marketing Team
- c. Event Volunteers
- d. Development Office Volunteers

Publicity (for fundraising):

A combination of newsletters, E-communications, the school website, and social media will be used to support financial development efforts.

Dollars:

The expenses that will be incurred to raise the amounts included in this plan are as follows:

	2019/2020
Personnel Costs*	\$117,000
Consumable Costs	\$5,500
Advertising Costs	\$7,500
Event Costs	\$62,200
Total	\$192,200

**This includes ½ of superintendent salary, executive assistant salary, and director of communication salary.*