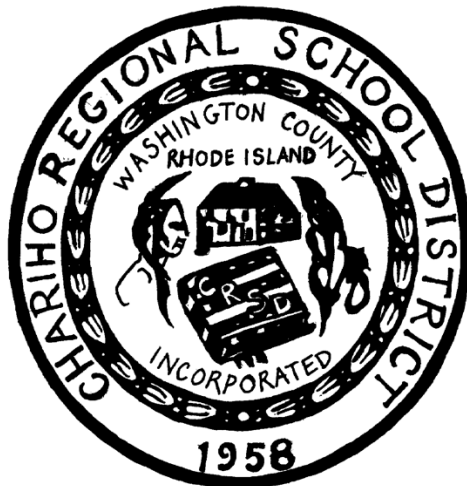


# Chariho Regional School District Development Plan



presented to and approved by the  
Chariho Regional School District's School Committee  
on February 26th 2019

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**Disclaimer:** This document is meant to serve as a *guide* for strategic development. This plan is subject to change and revision if situations arise to warrant changes and/or revisions (i.e. the Development Officer shifts focus to write a large grant or the District receives a large grant needing the Development Officer's support).

# I. Background Summary

The Chariho Regional School District (CRSD) is a pre-K-12 public school system, which serves students living in Charlestown, Richmond, Hopkinton, and across Rhode Island. The District includes four elementary schools, an alternative learning academy, a career and technical center, a middle school, and the #3 ranked high school in Rhode Island.

Based on 2017 U.S. census estimates, data on the three towns are as follows:

	<b>Charlestown</b>	<b>Hopkinton</b>	<b>Richmond</b>	<b>TOTAL</b>
<b>Number of residents</b>	7,812	8,119	7,637	23,568
<b>Number of households</b>	3,171	3,276	2,832	9,279
<b>Median household income</b>	\$73,203	\$74,436	\$95,026	
<b>Residents under 5</b>	4.7%	3.2%	3.3%	
<b>Residents under 18</b>	18.1%	18.9%	21.6%	
<b>Residents 19-64</b>	55.9%	62.4%	62.4%	
<b>Residents over 65</b>	21.3%	15.5%	12.7%	

Several changes have occurred over the past few years in the CRSD. CHARIHotech, the regional Career and Technical Center hosted by the District, moved from 3-year to 4-year programs in the 2017-2018 school year. Last year, the new Director began collecting exit interview data and remaining in contact with recent alumni, for the purpose of informing our community about where our CTC graduates are heading after graduation (i.e. school, employment, etc.). The Chariho Alternative Learning Academy (CALA) officially opened its doors in a ribbon-cutting ceremony in late August 2018. In 2018, the School Committee approved the District’s first Development Officer position, which is a part-time position.

The CRSD is entering a new phase of growth, which requires a more structured and diverse developmental strategy. This Development Plan builds on the work that was begun by the District and supported by the School Committee in order to meet the CRSD’s ambitious goals as detailed in Vision 2023.

Our Development Plan is currently informed by one main document:

1. The Strategic Plan: The District recently adopted a new Strategic Plan, "[Vision 2023](#)". In that plan, there are six priority areas, each with their own objectives and action steps:

**Priority area #1:** Striving for Excellence

**Priority area #2:** Infrastructure: Healthy, Safe, and Flexible Environments for Learning

**Priority area #3:** Voice and Choice for Students and Staff

**Priority area #4:** Improve Postsecondary Outcomes

**Priority area #5:** Global Citizenship

**Priority area #6:** Partnerships Across the Community

This Development Officer seeks to connect the Development Plan to each of these six priority areas.

**Why is development needed at CRSD?** In the increasingly competitive educational landscape, CRSD would greatly benefit from strategic development. With more and more schools competing for both students and funds, the environment is increasingly competitive. With this said, the CRSD should begin an active development program that explores areas of giving that have always been accepted, but have not been actively sought out. This would bring the CRSD in line with all universities and colleges as well as most private and charter K-12 schools, which all have development offices.

## II. Types of Funding

Every year the School Committee adopts the CRSD’s operational and capital budget. The last three budgets impacted the three member towns as follows:

Fiscal year	Impact on member towns
2016-2017	\$50,817,764.00
2017-2018	\$51,814,424.31
2018-2019	\$52,487.968.76

There are various additional funding streams that provide supplemental revenue for CRSD:

Supplemental Funding—This includes money raised outside of governmental sources for the CRSD. This category does not include federal and state formula-funding sources, but does include state competitive categorical aid and other miscellaneous state awards. There are two main types of philanthropic support that CRSD pursues:

- a. Annual Giving—Money raised from individuals and small businesses and corporations is a new focus of CRSD’s development efforts. This should be broken down further into (1) individual giving, (2) donations, and (3) small business and corporate giving.
- b. Grants—The money awarded from grant-writing encompasses a significant portion of the fundraising arm of CRSD, but it is not our sole focus.

**The breakdown for supplemental funding for the past two fiscal years is as follows:**

Fiscal year	Individual giving	Number of donations approved by School Committee	Estimated value of donations	Support from grants
2016-2017	0	33	\$24,698.75	\$198,598.76
2017-2018	\$1200	30	\$23,350.00	\$446,115.12

The following are organizations that we have applied to for grant funding in the past two years (2016-2017 and 2017-2018) with grants received in **bold**:

American Councils for International Education	Lighthouse Foundation
<b>Big Yellow Bus Grant</b>	<b>National Society Daughters of the American Revolution</b>
Braitmayer Foundation	<b>PanoramaEd</b>
<b>Champlin Foundation</b>	<b>Prepare RI</b>
<b>Chariho Rotary Club</b>	<b>Providence Engineering Society</b>
<b>Community 2000</b>	Recess Rocks
<b>CTE Education Trust</b>	<b>Rhode Island Association of School Principals</b>
<b>ECET2 Mini Grant</b>	<b>Rhode Island Department of Education</b>
<b>Educational Alliance</b>	<b>RI Foundation</b>
Electric Boat	Steelcase Education
Follett Challenge	<b>Tractor Supply</b>
Fuel Up to Play 60	US Fish & Wildlife Service
Greenlove	Walmart Foundation
Highlander Institute	<b>Westerly Community Credit Union</b>
<b>Kimball Foundation</b>	

While certainly not an exhaustive list, the following are internal groups and external organizations that also provide support to the CRSD in some way:

- Ashaway PTO
- Champlin Foundation
- Chariho High School Community Partnership (CHS-CP)
- Chariho Rotary Club
- Chariho Sports Boosters
- Charlestown PTO
- Community 2000
- Department of Environmental Management (DEM)
- Harvest Acres
- Hope Valley PTO
- League of Innovative Schools
- Office of Innovation
- Rhode Island Center Assisting those in Need (RICAN)
- Rhode Island Department of Education
- Rhode Island Foundation
- Richmond PTO
- Special Education Advisory Council (SEAC)
- School Improvement Team
- University of Rhode Island
- Westerly Community Credit Union
- Wood River Health Services

### III. Goals and Objectives

The primary goal of our Development Plan is to provide the supplemental revenue necessary to fund additional CRSD projects. The goals for the next fourteen months will be focused on the following three areas— Individual Giving, Donations, and Small Business and Corporate Giving.

**Individual Giving:** In 2017-2018, one person sent in a monthly check to help support overdue lunch bills. This member of the community did this unprompted after reading a local news story on the issue. By the end of the 2019-2020 fiscal year, CRSD will start an annual campaign that promotes monthly giving.

Fiscal year	Individual giving amount	Number of individuals giving	Target number of people to support the District through Individual Giving
2016-2017	0	0	
2017-2018	\$1200	1	
2018-2019	\$1200	1	
2019-2020			25
2020-2021			50

**Donations:** In 2016-2017, thirty-three people supported the school through donations. The following year, thirty people donated items in support of our students. This does not include small donations that parents may have made to their child’s class, but larger donations that were acknowledged by the School Committee and found within the Annual Report. By the end of the 2019-2020 fiscal year, CRSD will start a formal donation program that is connected to our website.

Fiscal year	Estimated value of donations	Number of donations approved by School Committee	Target number of people to support the District through donations
2016-2017	\$24,698.75	33	
2017-2018	\$23,350.00	30	
2018-2019			30
2019-2020			40
2020-2021			60

**Small Business and Corporate Giving:** By the beginning of the 2019-2020 fiscal year, CRSD will begin focusing on small business and corporate giving.

Fiscal year	Small business and corporate giving	Number of small business and corporate sponsors	Target number of corporations and small business to support the District through Annual Giving
2016-2017	0	0	
2017-2018	0	0	
2018-2019	0	0	
2019-2020	\$4,000		2
2020-2021	\$8,000		4

These projections include modest increases in foundation giving and donations. The most substantial increase is projected in the area of Individual Giving, which is the area of greatest untapped potential.

Although monthly targets are not advisable for small business and corporate giving, monthly targets are advisable for individual giving (i.e. \$500/month) and donations (i.e. \$2000/month).

From here, the goal of this plan is to provide a plan to raise the above budgeted revenues. To meet these goals, the CRSD must meet the following objectives:

- Build a development infrastructure that can support a dynamic fundraising operation of the size and scope laid out in this plan
- Establish a donor database with at least 300 names and begin to cultivate 25 prospects
- Establish scalable fundraising systems that allow for one development-focused staff member to efficiently carry out this work
- Create easy and trusted methods for cultivating and maintaining relationships with donors and prospects
- Reach out to the CRSD’s core donors to expand our universe of prospects
- Utilize development best practices, ambitious goals, and measurable metrics



## IV. Assumptions

The CRSD is operating under the following assumptions:

- The CRSD has a strong network of friends, prospects, and donors, but has not always had the staff resources to maximize this network
- Our School Committee is supportive of our Development Plan
- We will continue to have a strong PTO presence in our four elementary schools and middle school
- Our area of greatest need and potential is an individual, monthly giving program. With strong foundation, government, and event programs, CRSD have yet to tap into the individual giving market with strategic and coordinated effort (i.e. parents, alumni, and community members). This accounts for over 70% of philanthropic giving in the United States each year.
- The current development environment is challenging due to the state of the economy
- A well-structured development operation will allow the CRSD to meet its revenue goals
- Several large grants will be submitted and awarded in the 2018-2019 fiscal year

## V. Development Infrastructure

The focus of the next two years is to grow the District's development capacity, especially in the areas of individual giving and donations. To do this, the Development Officer will focus on six goals in Year 1 with six more in Year 2.

### Year 1 (2018-2019)

1. **Create grant and development training materials** for teachers and staff to be included in the Chariho development handbook

The Development Officer will create grant materials that would focus on the grant process, such as grant research, writing, internal approval, administration, and report writing. The Development Officer will create development training materials that include an overview of development basics (for terms such as annual campaign, case for support, donor, in-kind contribution, pledge, prospect, restricted and unrestricted funds), as well as a prospect Google form and donation letter templates. The Donor Bill of Rights and the AFP Code of Ethical Principles and Standards of Professional Practice will be widely disseminated. This training will be offered as an optional professional development to faculty and staff in the 2019-2020 academic year

Action steps	Completion timeframe
<b>1.1</b> The Development Officer will meet with key stakeholders to create an outline for the grant training materials (i.e. the Assistant Superintendent, the Administrative Assistant to the Assistant Superintendent's, all Principals and Directors, and our Humanities and STEM Specialists).	<b>February 2019</b>
<b>1.2</b> The Development Officer will create training PowerPoint slides and handouts.	<b>March-April 2019</b>
<b>1.3</b> The Development Officer will record a Screencast and post the recording along with all training materials to the CRSD's internal Grant Google site, views will be measured to track effectiveness.	<b>May-June 2019</b>

2. **Assemble a case for support** including collateral and other marketing materials for the District as a whole and each of the District’s eight schools, including but not limited to athletics, internship program, extracurriculars, etc.

The Development Officer will create a case for support using a 5-hour video series created by Campbell & Company, which is available through YouTube: <https://www.youtube.com/user/CampbellCo76/videos>. The Development Officer will create a print-based case for support as well as a web-based and a video-based case for support.

- i. The print case for support should be 1-2 pages in length and focus on the need, the “cure,” and include a call to action, including the return on investment. A strong print-based example is here: <https://static1.squarespace.com/static/57532abf27d4bd17be970a61/t/5a3186d80d9297be3bbe04d6/1513195226407/MICDS5.pdf>
- ii. A strong web-based example is here: <https://www.cathedralschoolcampaign.org/>
- iii. A strong video-based example is here: <https://www.youtube.com/watch?v=CSjOL-F5gVo>

Action steps	Completion timeframe
<b>2.1</b> Administration will agree upon the components in the case for support and a rough brochure template.	<b>February 2019</b>
<b>2.2</b> The Development Officer will brainstorm and draft collateral for all eight schools with Principal or Director and staff support.	<b>March-April 2019</b>
<b>2.3</b> The Development Officer will combine all brochures into a larger case for support portfolio and finalize the district-wide case for support.	<b>May-June 2019</b>

3. **Coordinate a social media campaign** that encompasses all active social media players in CRSD (administrators, staff, teachers, PTO, etc.) and connects all official FaceBook, Twitter, Instagram, and YouTube accounts.

Today, social media is one of the main ways that students, families, and community members are communicating. The social media campaign must consider our target audiences and include a weekly content strategy that resonates across the district. It should increase awareness around CRSD, bring people to events and increase our website traffic, and help build a sense of community.

Action steps	Completion timeframe
<p><b>3.1</b> The Development Officer will create a list of all administrators, teachers, and groups on social media with accounts. Assess adherence to policy or recommend changes to policy. The Development Officer will create a master calendar for potential social media activity, including hashtags and days to remember. Create one-page “how to” guides for professional FaceBook, Twitter, Instagram, and YouTube accounts.</p>	<p><b>February 2019</b></p>
<p><b>3.2</b> The Development Officer will outline an ongoing social media marketing campaign that will help strengthen our brand and help us connect with our audience (i.e. one hashtag could be #wearechariho where we would spotlight a student, teacher, staff member, or administrator each weekday and share their Chariho story). This would be in addition to (and not in replace of) existing hashtags, such as #chariholearns.</p>	<p><b>March-April 2019</b></p>
<p><b>3.3</b> The Development Officer will have all materials reviewed internally and then create a screencast to roll out our social media campaign. Effectiveness will be measured by increased reach, likes, and shares based on the following sources:  <a href="https://neilpatel.com/blog/social-media-measurement/">https://neilpatel.com/blog/social-media-measurement/</a> and  <a href="https://blog.hubspot.com/marketing/social-media-campaigns">https://blog.hubspot.com/marketing/social-media-campaigns</a>.</p>	<p><b>May-June 2019</b></p>

#### 4. Revise and expand our Annual Report

In previous years, the report has been made through SunGraphics in a program called Design and distributed by the WesterlySun. Last year this included over 12,000 copies, which were distributed by the WesterlySun and cost \$3,813. The District will explore creating new options this year, such as creating a full-color glossy Annual Report. A strong example is here:

[https://issuu.com/theparkschoolofbuffalo/docs/park\\_ar\\_2015-16\\_for\\_issuu](https://issuu.com/theparkschoolofbuffalo/docs/park_ar_2015-16_for_issuu).

Our Development officer is proficient in using LucidPress in professional capacities and could help design this in-house. There are various templates that might work well, including this one:

[https://drive.google.com/file/d/1ZcC4I4kjlw\\_cXozh2SqFO-cdHKnMrye\\_3/view?usp=sharing](https://drive.google.com/file/d/1ZcC4I4kjlw_cXozh2SqFO-cdHKnMrye_3/view?usp=sharing)

Action steps	Completion timeframe
<b>4.1</b> The District will establish a Chariho Annual Report Committee. The committee will do preliminary work on cost, including the cost of design, printing, and dissemination.	<b>February 2019</b>
<b>4.2</b> The Committee will meet with our contacts at WesterlySun and other potential partners to see our options for printing and distribution. Meet to determine the program to be used and how the report can expand and/or be made more professional in appearance. Discuss the benefits of print versus digital reports. Determine how the report will be printed and distributed.	<b>March 2019</b>
<b>4.3</b> The Development Officer will work with the Superintendent's Administrative Assistant to draft the report's main pages. The Development Officer will distribute monthly updates to committee for review and feedback. Submit report draft to be approved by School Committee.	<b>April-June 2019</b>
<b>4.4</b> The Chariho Annual Report will be ready to print and disseminate (print and digital dissemination).	<b>July 2019</b>

**5. Establish a Chariho Alumni and Friends Network**

In order to reach alumni, parents, and the broader community, a Chariho and Friends Network will be created. Materials to support this venture will be created and shared with all administrative teams, which can be shared at school events throughout the year. This will help with name recognition and growing the network.

Action steps	Completion timeframe
<p><b>5.1</b> The Development Officer will establish a Chariho Alumni and Friends Network with a page on our district website as well as a FaceBook and Twitter presence. A mailing list will also be started for all members.</p>	<p><b>March 2019</b></p>
<p><b>5.2</b> The Development Officer will work with administration to brainstorm necessary materials for a “booth”--including handouts, a logo, a booth banner, a District-wide calendar of non-ask events, Google forms, GMail account, and a web presence. The Development Officer will also reach out to and speak with 6-10 active alumni, parents, and friends to see their interests, needs, and potential vision.</p>	<p><b>April 2019</b></p>
<p><b>5.3</b> The Development Officer will work to put together Chariho Alumni and Friends Network packets that can be used at all school events during the school year. These materials will be available for the start of the school year.</p>	<p><b>May-June 2019</b></p>

**6. Create a URI-CRSD Alliance**

Given the CRSD’s close proximity to URI, coupled with the fact that many of our graduating seniors attend the university, we should consider various strategic partnerships across the university. While existing partnerships exist, expanding these will better connect our students and our teachers to more opportunities.

<b>Action steps</b>	<b>Completion timeframe</b>
<b>6.1</b> The Development Officer will meet with each Principal/Assistant Principal/Director to identify the partnerships that are already established with URI and the potential for expanding.	<b>March 2019</b>
<b>6.2</b> The Development Officer will meet with at least ten Departments and Offices identified in March to establish stronger working partnerships and consider the need for MOUs.	<b>April-June 2019</b>

## Year 2 (2019-2020)

7. **Expand our fundraising and development policies and procedures** to be included in the Chariho development handbook

In order for the District to strengthen and grow, various policies must be revisited and/or created. A strong example of a fundraising and development policy can be found here: <http://www.beckcenter.org/wp-content/uploads/2012/11/Fundraising-Policy-and-Procedures-RevNov2012.pdf>, <https://boardsource.org/resources/board-fundraising-policy-key-elements-practical-tips-and-sample-policy/>. More information on Donor Recognition can be found here: [https://www.adrp.net/assets/documents/bestpractices/adrp\\_best\\_practices-donor\\_recognition.pdf](https://www.adrp.net/assets/documents/bestpractices/adrp_best_practices-donor_recognition.pdf).

Action steps	Completion timeframe
7.1 The Development Officer will draft a new fundraising and development policy, including a donor recognition and foundation giving policy.	July-August 2019
7.2 The Development Officer will meet with at least ten Departments and Offices identified in March to establish stronger working partnerships and consider the need for MOUs.	September 2019
7.3 Policies and procedures will be edited and formally adopted.	October-January 2020



8. **Set-up a prospect and donor database** to include uniform tracking procedures for prospects and donors as part of the Chariho development handbook.

In order to assist with the following, eTapestry by BlackBaud is one suggested subscription. Ideally, Chariho would invest in their Pro package, which is \$399/month or \$4800/year. This software goes above and beyond the capabilities of something like excel, as it was tailor made for development work. Programs such as these would help cultivate and maintain loyal donors for the CRSD, decrease administrative overhead, and capture valuable institutional knowledge that would somehow be lost over time. In the CRSD, a donor database does not currently exist, so we anticipate that it will grow slowly, but steadily over the coming year.

Action steps	Completion timeframe
<p><b>8.1</b> The district will purchase an annual subscription to eTapestry. The Development Officer and others will be trained on eTapestry by Blackbaud. The Development Officer will create a donor prospect form for teachers and staff to share likely prospects with the Development Officer. The Development Officer will draft other necessary forms, such as a prospect profile template, prospect process, including a system for referrals, a solicitation plan, a call sheet, moves management plan and checklist, and a list of non-ask events (school tours, kindergarten registration, open house, hosting tour of campus, unveiling something, hosting speaker, opportunity to volunteer) for each school, sample event invitations, and share with administration for feedback.</p>	<p><b>July-August 2019</b></p>
<p><b>8.2</b> The donor prospect form will be available for the start of the school year. A description of its purposes will be emailed to all administrators, teachers, and staff.</p>	<p><b>September 2019</b></p>
<p><b>8.3</b> Policies and procedures will be edited and formally adopted.</p>	<p><b>October-January 2020</b></p>

9. **Create a district-wide Small Business and Corporate Giving and Recognition Policy** to go in the Chariho development handbook

It is common for businesses and corporations to support organizations in their communities, such as schools. With this in mind, the CRSD should help facilitate these potential relationships in a way that supports the needs of our students.

Action steps	Completion timeframe
<p><b>9.1</b> The Administrative team will draft naming protocols and select appropriate means of recognition throughout the district based on other industry standards (i.e. plaques, giving level wall).</p>	<p><b>July 2019</b></p>
<p><b>9.2</b> The Development Officer will draft a Small Business and Corporate Giving and Recognition Policy.</p>	<p><b>August 2019</b></p>
<p><b>9.3</b> The Development Officer will share the Small Business and Corporate Giving and Recognition Policy at the September All Leads meeting for edits and suggestions.</p>	<p><b>September 2019</b></p>
<p><b>9.4</b> The Development Officer will take a building tour with each Principal and/or Director and brainstorm a list of three to five locations in the building that might benefit from small business and corporate sponsorships. They will also discuss potential event sponsorship in a given academic year (i.e. school events) and what an appropriate recognition would be (i.e. listing in the program book).</p>	<p><b>October 2019</b></p>

10. **Create a development-focused webpage** through the new CRSD website

All development efforts should connect to a strong web presence. The capacity for this web presence will be done in consultation with the IT department on our new website. A strong example of the potential for our web presence can be seen here: <https://www.iupuc.edu/giving/development-external-affairs/index.html>.

Action steps	Completion timeframe
<p><b>10.1</b> The Development Officer will meet with Administration and IT to discuss the needs and possibilities for a development-focused webpage. A web page mock-up will be drafted. This mock-up should include an area where each school can highlight specific donations that they would welcome from parents and the larger community.</p>	<p><b>July-August 2019</b></p>
<p><b>10.2</b> The webpage will be tested and reviewed by administration. The Development Officer will edit materials based on feedback.</p>	<p><b>September-December 2019</b></p>
<p><b>10.3</b> The webpage will go live with quarterly reviews and edits suggested.</p>	<p><b>January 2019</b></p>

**11. Establish a nonprofit foundation for development purposes and invest with the Rhode Island Foundation**

For governing purposes, it is recommended that we establish a 501(c)(3) nonprofit organization, The Chariho Foundation (“The Foundation”). This is common practice at most universities and colleges as well as private schools that engage in development work. Nonprofit status will allow donors to give with confidence that their donation is tax exempt to the full extent of the law. For financial purposes, a partnership with the Rhode Island Foundation is also suggested. This can only be done after the CRSD and the Foundation have raised \$10,000.

<b>Action steps</b>	<b>Completion timeframe</b>
<b>11.1</b> The Development Officer will work with legal counsel to set-up The Chariho Foundation and open a bank account.	<b>July 2019</b>
<b>11.2</b> The Development Officer will facilitate monthly Foundation meetings. When \$10,000 has been raised, the funds will be invested with the Rhode Island Foundation.	<b>August 2019-June 2020</b>

**12. Launch the Chariho Foundation Annual Campaign**, which promotes monthly giving and reaches out to the following stakeholders:

1. Parents of current and former CRSD students
2. CRSD alumni
3. Residents of Charlestown, Richmond, and Hopkinton
4. Current staff and retirees from the district
5. All local businesses in Charlestown, Richmond, and Hopkinton

Strong annual campaign examples can be found here:

- i. <https://static1.squarespace.com/static/57532abf27d4bd17be970a61/t/5a3186d80d9297be3bbe04d6/1513195226407/MICDS5.pdf>
- ii. <https://brunonia.brown.edu/giving/warren-arpert-medical-school/info/brown-medical-annual-fund>

Action steps	Completion timeframe
<b>12.1</b> The Development Officer will work with the Foundation to draft an annual campaign timeline, structure, and materials.	<b>October 2019</b>
<b>12.2</b> The Development Officer will draft materials and share those with administration for monthly feedback.	<b>November-December 2019</b>
<b>12.3</b> These drafted materials will be shared with a focus group of 6-10 diverse stakeholders for feedback.	<b>January 2019-February 2020</b>
<b>12.4</b> The Development Officer will make edits based on focus group feedback.	<b>March 2020</b>
<b>12.5</b> Target date for the annual campaign to launch.	<b>April 2020</b>

## VI. Donor Communication and Cultivation Strategy

A strong donor prospect plan is needed to ensure a viable and growing donor base. This plan must be donor-centered and should be focused on expanding our prospect universe and sustaining relationships through our natural networks, including parents, alumni, extended family of students, extended family and friends of alumni, and community members. The Development Officer will work with teachers and staff to connect with prospects, engage with current donors, and reconnect with lapsed donors. The donor prospect plan should be created in consultation with the following resources:

- [https://www.blackbaud.co.uk/files/Finding\\_Major\\_Donor\\_Prospect\\_Schools.pdf](https://www.blackbaud.co.uk/files/Finding_Major_Donor_Prospect_Schools.pdf)
- [https://resources.causevox.com/hubfs/eBooks/Donor\\_Engagement\\_Retention\\_Playbook\\_-\\_CauseVox.pdf?t=1467312973697](https://resources.causevox.com/hubfs/eBooks/Donor_Engagement_Retention_Playbook_-_CauseVox.pdf?t=1467312973697)
- <https://www.nonprofitpro.com/post/5-proven-ways-find-nonprofit-major-donor-prospects/>
- <https://www.donorsearch.net/prospect-research-ultimate-guide/>
- <https://www.qgiv.com/blog/donor-stewardship-guide/>
- <https://www.slideshare.net/NonprofitWebinars/major-gifts-moves-management-made-easy>

Since finding prospects is critical to our Development strategy, the following are (or are soon to become) our main foci for growing our prospect and donor pool:

1. Alumni and Friends Network (**NEW** in the '19-'20 fiscal year)
2. Annual report
3. Collateral materials and command appearance scripts (**NEW** in the '19-'20 fiscal year)
4. Donor prospect form (**NEW** in the '19-'20 fiscal year)
5. Non-ask events (**NEW** in the '19-'20 fiscal year)
6. Social media presence
7. Webpage presence (**NEW** in the '19-'20 fiscal year)

### Prospect Cultivation Strategy and Timeline

The way in which one approaches a prospect and potential donor is critical. The Development Officer and the CRSD need to be confident in their vision and have a clear series of steps for prospect cultivation. As such, our prospect cultivation steps are as follows:

<b>Step 1</b>	Information on new prospect is received by Development Officer.
<b>Step 2</b>	Development Officer conducts basic research on giving ability.
<b>Step 3</b>	Development Officer invites prospect to non-ask event and notifies relevant administrators, teachers, and staff.
<b>Step 4</b>	Non-ask event occurs.

<b>Step 5</b>	Follow-up phone call occurs one week after event to help strengthen relationship.
<b>Step 6</b>	If prospect is not interested in supporting the CRSD, stop cultivation process. If they indicate an interest in supporting the CRSD, the prospect should be added to eTapestry and our mailing list and listserv.
<b>Step 7</b>	For high level prospects, a special timeline should be established to connect them more closely with the initiatives of the CRSD. For all prospects, a follow-up phone call should be made one week after they have received their first email/ mailing.
<b><i>Steps 3-7 should occur as many times as deemed necessary, before making an ask.</i></b>	
<b>Step 8</b>	Development Officer makes ask using the most appropriate method (i.e. via email, phone, in-person).

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

Studies show that donors who are contacted in a variety of formats are more likely to give and more often. Therefore, we will use several communication tactics:

**Snail Mail:** Standard postal mail will be done at least once a year once the Annual Campaign is launched. A copy of the Annual Report should also be directly mailed to all donors, if not residents of Charlestown, Richmond, or Hopkinton. Recognition event invitations should also be directly mailed.

**Email:** The Development Officer will email donors one monthly update and at least one annual solicitation on behalf of the CRSD and the Foundation.

**Social Media:** FaceBook and Twitter should be used to share information about non-ask events and our Annual Campaign. Social media should also be used at least once a week to share “feel good” post (with images) from within the CRSD. These posts should especially connect to donor support and impact, when possible.

**Recognition events:** The CRSD and the Foundation should plan quarterly recognition events for our highest donors. These could include things like breakfast or lunch with the Superintendent or Principal.

**Phone calls:** Donors who give at or above a predetermined level, should be thanked with a phone call, in addition to the other forms of communication listed.

The CRSD development communications timeline should be as follows:

Donor Level	July	August	September	October
<b>\$1-\$240</b>	Snail mail Annual Report	E-update	E-update  Q2 non-ask events	E-update
<b>\$241-\$499</b>	Snail mail Annual Report	E-update	E-update  Q2 non-ask events  Phone call	E-update
<b>\$500+</b>	Snail mail Annual Report	E-update	E-update  Q2 non-ask events  Phone call	E-update
Donor Level	November	December	January	February
<b>\$1-\$240</b>	E-update  Recognition	E-update  Q3 non-ask events	E-update	E-update
<b>\$241-\$499</b>	E-update  Recognition	E-update  Q3 non-ask events	E-update	E-update  Recognition
<b>\$500+</b>	E-update  Recognition	E-update  Q3 non-ask events	E-update	E-update  Recognition
Donor Level	March	April	May	June
<b>\$1-\$240</b>	E-update  Q4 non-ask events	Snail mail: Annual campaign	E-update  Thank you (ongoing)	E-update  Recognition
<b>\$241-\$499</b>	E-update  Q4 non-ask events	Snail mail: Annual campaign  Phone call	E-update  Thank you (ongoing)  Phone call	E-update  Recognition
<b>\$500+</b>	E-update  Q4 non-ask events	Snail mail: Annual campaign  Phone call	E-update  Thank you (ongoing)  Phone call	E-update  Recognition



## VII. Fundraising Needs and Goals

Considering that so much strategic visioning will be occurring in the next fourteen months, goals should be modest for the 2018-2019 and 2019-2020 fiscal years. In order to partner with the Rhode Island Foundation, we must raise at least \$10,000. This could be accomplished in the 2019-2020 fiscal year, but is more likely to be reached in the 2020-2021 fiscal year. This is based on the following projections:

### Individual Giving

Fiscal year	Target donors	All giving \$60 (\$5/month)	All giving \$120 (\$10/month)	All giving at \$240 (\$20/month)
2019-2020	30	\$1,500	\$3,000	\$6,000
2020-2021	60	\$4,500	\$9,000	\$18,000

### Small Business and Corporate Giving

Fiscal year	Target donors	All giving \$1,000 annually	All giving \$2,000 annually	All giving \$3,000 annually
2019-2020	2	\$2,000	\$4,000	\$6,000
2020-2021	4	\$4,000	\$8,000	\$12,000

### Donations

Fiscal year	Estimated value of donations	Number of donations approved by School Committee	Target number of people to support the District through donations
2016-2017	\$24,698.75	33	
2017-2018	\$23,350.00	30	
2018-2019			30
2019-2020			40
2020-2021			60

These projections include modest increases in foundation giving and donations. The most substantial increase is projected in the area of Individual Giving, which is the area of greatest untapped potential.

Although monthly targets are not advisable for small business and corporate giving, monthly targets are advisable for individual giving (i.e. \$500/month) and donations (i.e. a value of \$2000/month).

## VIII. Action Step Timeline

In conclusion, this Strategic Development Plan is a guide for the CRSD over the next fourteen months. During this time, the Development Officer will work to establish the necessary elements of a Development Office. Broadly, the work done during this time will ensure that the CRSD can make strong progress in the following three areas— Individual Giving, Donations, and Small Business and Corporate Giving. This work is also critical to the CRSD’s long-term development success and should be started as soon as possible.

### Year 1: Winter 2019

Action steps	Completion timeframe
<p><b>1.1</b> The Development Officer will meet with key stakeholders to create an outline for the grant training materials (i.e. the Assistant Superintendent, the Administrative Assistant for the Assistant Superintendent’s Office, all Principals and Directors, and our Humanities and STEM specialists).</p>	<p><b>February 2019</b></p>
<p><b>2.1</b> Administration will agree upon the components in the case for support and a rough brochure template.</p>	<p><b>February 2019</b></p>
<p><b>3.1</b> The Development Officer will create a list of all administrators, teachers, and groups on social media with accounts. Assess adherence to policy or recommend changes to policy. The Development Officer will create a master calendar for potential social media activity, including hashtags and days to remember. Create one-page “how to” guides for professional FaceBook, Twitter, Instagram, and YouTube accounts.</p>	<p><b>February 2019</b></p>
<p><b>4.1</b> The District will establish a Chariho Annual Report Committee. The committee will do preliminary work on cost, including the cost of design, printing, and dissemination.</p>	<p><b>February 2019</b></p>

## Year 1: Spring 2019

Action steps	Completion timeframe
1.2 The Development Officer will draft training PowerPoint slides and handouts. The Development Officer will share the drafted materials for feedback and edit materials based on feedback.	<b>March-April 2019</b>
1.3 The Development Officer will record a Screencast and post the recording along with all training materials to the CRSD's internal Grant Google site, views will be measured to track effectiveness.	<b>May-June 2019</b>
2.2 The Development Officer will brainstorm and draft collateral for all eight schools with the Principal or Director and staff support.	<b>March-April 2019</b>
2.3 The Development Officer will combine all brochures into a larger case for support portfolio and finalize the district-wide case for support.	<b>May-June 2019</b>
3.2 The Development Officer will outline an ongoing social media marketing campaign that will help strengthen our brand and help us connect with our audience (i.e. one hashtag could be #wearechariho where we would spotlight a student, teacher, staff member, or administrator each weekday and share their Chariho story). This would be in addition to (and not in replace of) existing hashtags, such as #chariholearns.	<b>March-April 2019</b>
3.3 The Development Officer will have all materials reviewed internally and then create a screencast to roll out our social media campaign. Effectiveness will be measured by increased reach, likes, and shares based on the following sources: <a href="https://neilpatel.com/blog/social-media-measurement/">https://neilpatel.com/blog/social-media-measurement/</a> and <a href="https://blog.hubspot.com/marketing/social-media-campaigns">https://blog.hubspot.com/marketing/social-media-campaigns</a> .	<b>May-June 2019</b>
4.2 The Committee will meet with our contacts at WesterlySun and other potential partners to see our options for printing and distribution. Meet to determine the program to be used and how the report can expand and/or be made more professional in appearance. Discuss the benefits of print versus digital reports. Determine how the report will be printed and distributed.	<b>March 2019</b>
4.3 The Development Officer will work with the Superintendent's Administrative Assistant to draft the report's main pages. The Development Officer will distribute monthly updates to committee for review and feedback. Submit report draft to be approved by School Committee.	<b>April-June 2019</b>

Action steps	Completion timeframe
<p><b>5.2</b> The Development Officer will work with administration to brainstorm necessary materials for a “booth”--including handouts, a logo, a booth banner, a District-wide calendar of non-ask events, Google forms, GMail account, and a web presence. The Development Officer will also reach out to and speak with 6-10 active alumni, parents, and friends to see their interests, needs, and potential vision.</p>	<p><b>April 2019</b></p>
<p><b>5.3</b> The Development Officer will work to put together Chariho Alumni and Friends Network packets that can be used at all school events during the school year. These materials will be available for the start of the school year.</p>	<p><b>May-June 2019</b></p>
<p><b>6.2</b> The Development Officer will meet with at least ten Departments and Offices identified in March to establish stronger working partnerships and consider the need for MOUs.</p>	<p><b>April-June 2019</b></p>

## Year 2: Summer 2019

Action steps	Completion timeframe
<b>4.4</b> The Chariho Annual Report will be ready to print and disseminate (print and digital dissemination).	<b>July 2019</b>
<b>7.1</b> The Development Officer will draft a new fundraising and development policy, including a donor recognition and foundation giving policy.	<b>July-August 2019</b>
<b>8.1</b> The district will purchase an annual subscription to eTapestry. The Development Officer and others will be trained on eTapestry by Blackbaud. The Development Officer will create a donor prospect form for teachers and staff to share likely prospects with the Development Officer. The Development Officer will draft other necessary forms, such as a prospect profile template, prospect process, including a system for referrals, a solicitation plan, a call sheet, moves management plan and checklist, and a list of non-ask events (school tours, kindergarten registration, open house, hosting tour of campus, unveiling something, hosting speaker, opportunity to volunteer) for each school, sample event invitations, and share with administration for feedback.	<b>July-August 2019</b>
<b>9.1</b> The Administrative team will draft naming protocols and select appropriate means of recognition throughout the district based on other industry standards (i.e. plaques, giving level wall).	<b>July 2019</b>
<b>9.2</b> The Development Officer will draft a corporate giving and recognition policy.	<b>August 2019</b>
<b>10.1</b> The Development Officer will meet with Administration and IT to discuss the needs and possibilities for a development-focused webpage. A web page mock-up will be drafted. This website should include an area where each school can highlight specific donations that they would welcome from parents and the community.	<b>July-August 2019</b>
<b>11.2</b> The Development Officer will facilitate monthly Foundation meetings. When \$10,000 has been raised, the funds will be invested with the Rhode Island Foundation.	<b>August 2019-June 2020</b>

## Year 2: Fall 2019

Action steps	Completion timeframe
7.2 The Development Officer will meet with at least ten Departments and Offices identified in March to establish stronger working partnerships and consider the need for MOUs.	<b>September 2019</b>
7.3 Policies and procedures will be edited and formally adopted.	<b>October-January 2020</b>
8.2 The donor prospect form will be available for the start of the school year on sharepoint. A description of its purposes will be emailed to all administrators, teachers, and staff.	<b>September 2019</b>
8.3 Policies and procedures will be edited and formally adopted.	<b>October-January 2020</b>
9.3 The Development Officer will share the corporate giving and recognition policy at the September All Leads meeting for edits and suggestions.	<b>September 2019</b>
9.4 The Development Officer will take a building tour with each Principal and/or Director and brainstorm a list of three to five locations in the building that might benefit from corporate sponsorship. They will also discuss potential event sponsorship in a given academic year (i.e. school events) and what an appropriate recognition would be (i.e. listing in the program book).	<b>October 2019</b>
10.2 The webpage will be tested and reviewed by administration. The Development Officer will edit materials based on feedback.	<b>September-December 2019</b>
10.3 The webpage will go live with quarterly reviews and edits suggested.	<b>January 2019</b>
11.2 The Development Officer will facilitate monthly Foundation meetings. When \$10,000 has been raised, the funds will be invested with the Rhode Island Foundation.	<b>August 2019-June 2020</b>
12.1 The Development Officer will work with the Foundation to draft an annual campaign timeline, structure, and materials.	<b>October 2019</b>
12.2 The Development Officer will draft materials and share those with administration for monthly feedback.	<b>November-December 2019</b>

## Year 2: Winter 2019-2020

Action steps	Completion timeframe
10.3 The webpage will go live with quarterly reviews and edits suggested.	<b>January 2019</b>
11.2 The Development Officer will facilitate monthly Foundation meetings. When \$10,000 has been raised, the funds will be invested with the Rhode Island Foundation.	<b>August 2019-June 2020</b>
12.3 These drafted materials will be shared with a focus group of 6-10 diverse stakeholders for feedback.	<b>January-February 2020</b>

## Year 2: Spring 2020

Action steps	Completion timeframe
11.2 The Development Officer will facilitate monthly Foundation meetings. When \$10,000 has been raised, the funds will be invested with the Rhode Island Foundation.	<b>August 2019-June 2020</b>
12.4 The Development Officer will make edits based on focus group feedback.	<b>March 2020</b>
12.5 Target date for the annual campaign to launch.	<b>April 2020</b>