



Clean Air Partners 2018 – 2020 Fundraising Plan 4/19/18

OVERVIEW

This Fundraising Plan is designed to support long-term execution of Clean Air Partners fundraising efforts in partnership with Sherry Matthews, Inc., beginning with a 2018 summer ozone season campaign. Understanding that needs and opportunities change over time, the framework in this plan allows for flexibility and refinement as we overcome challenges and achieve success. The Fundraising Plan has been developed in tandem and is closely aligned with the Marketing and Communications Plan.

FUNDRAISING PLAN OVERVIEW

All fundraising initiatives fall under the Education and Outreach or Marketing and Public Awareness program areas as outlined in the Clean Air Partners FY2019 Annual Work Program.

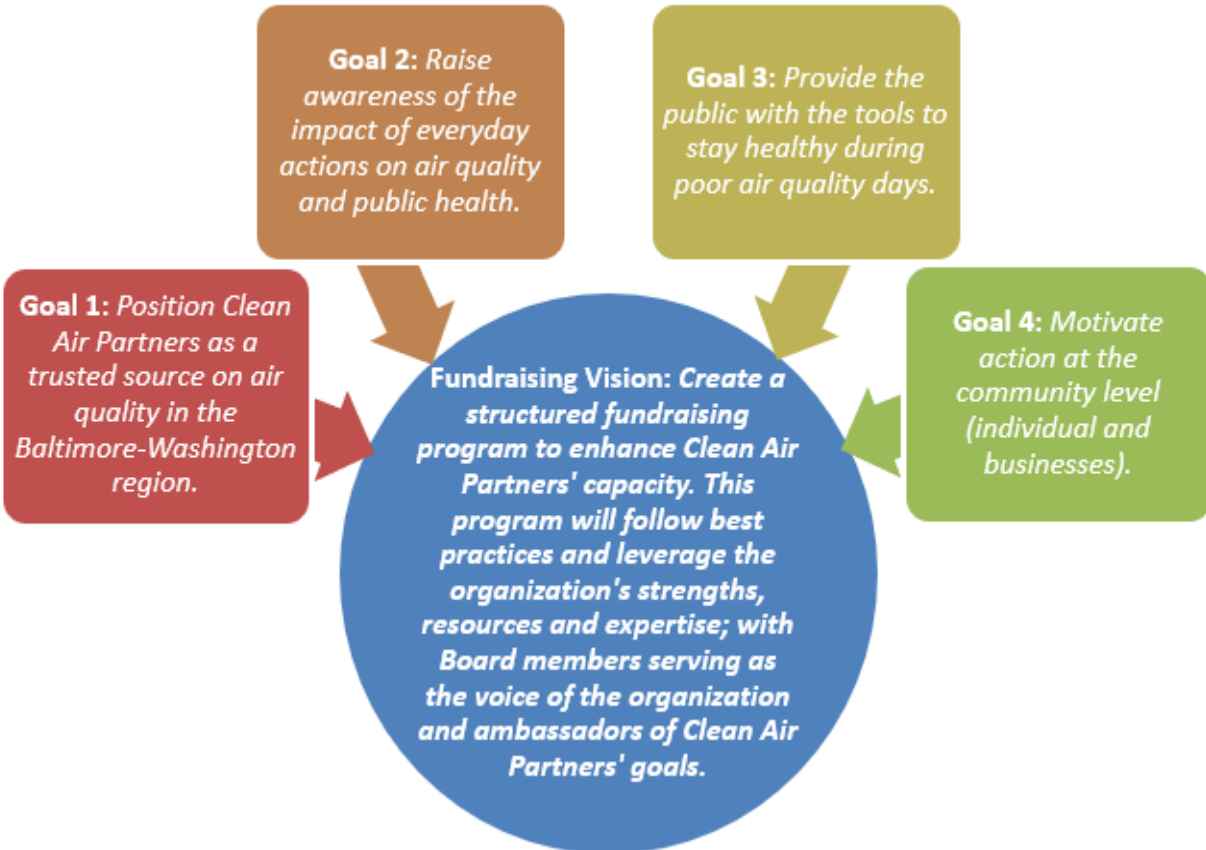
FUNDRAISING OBJECTIVES

- Improve Clean Air Partners capacity to fundraise using a variety of sources and approaches.
- Effectively support Clean Air Partners' initiatives and efforts to meet the four goals that guide the organization's work.
- Create a fundraising plan that addresses the organization's needs and includes key milestones and action steps.

FUNDRAISING CRITERIA FOR SUCCESS

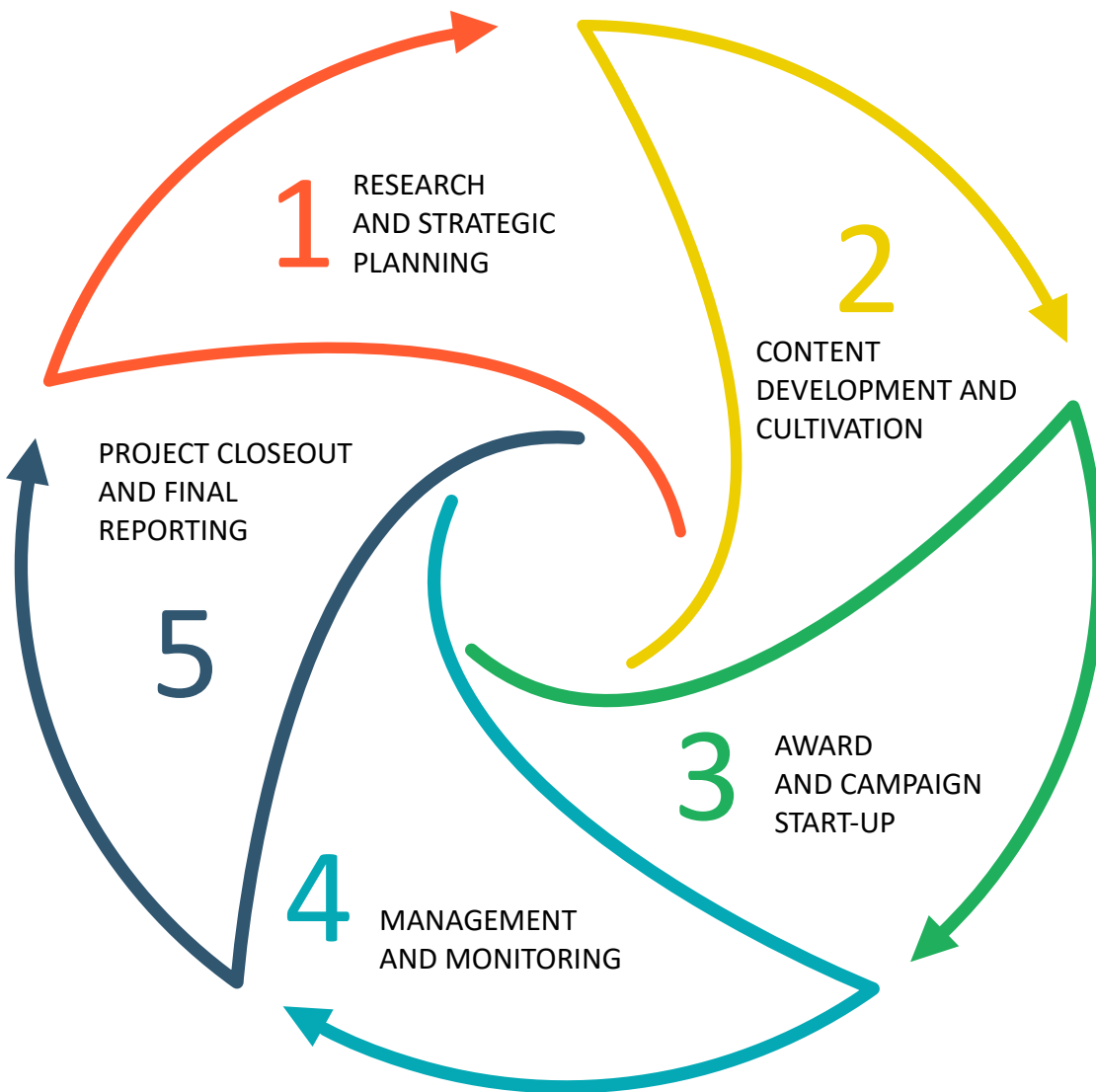
- Achieve annual fundraising goal.
- Develop a comprehensive fundraising strategy.
- Establish relationships with new partners and strengthen relationships with existing partners.
- Develop materials that reflect Clean Air Partners' needs, goals, initiatives, and impact.
- Build internal board capacity and accountability for fundraising efforts.

ORGANIZING PRINCIPLES AND VISION



FUNDRAISING LIFECYCLE

All fundraising initiatives (school education program, media campaign, and special event) will adhere to this activity lifecycle framework.



BREAKDOWN OF FUNDRAISING LIFECYCLE BY PHASES



Research and Strategic Planning

Purpose: Assess and plan for successful fundraising efforts

Resources: Previous plans, proposals, sponsorship packages, prospect lists, other documents

Project Leads: RBW Strategy/Sherry Matthews



Content Development and Cultivation

Purpose: Develop relationships with screened and prioritized prospects, and develop robust sponsorship and proposal content

Resources: Previous sponsorship packages, proposals, planning calendars, prospect lists, board member contacts

Project Leads: RBW Strategy/Sherry Matthews and Board members



Award and Campaign Start-up

Purpose: Ensure appropriate approach of fundraising initiative

Resources: Prospects, Clean Air Partners staff support, tracking tools

Project Leads: RBW Strategy/Sherry Matthews, Clean Air Partners staff, and Board members



Award Management and Monitoring

Purpose: Ongoing data tracking and reporting for grants and oversight of activities for event/campaign

Resources: Clean Air Partners staff support, tracking tools

Project Leads: RBW Strategy/Sherry Matthews and Clean Air Partners staff



Project Closeout and Final Reporting

Purpose: Reporting and closeout of all fundraising initiative activities

Resources: Project data, reports, tracking tools

Project Leads: RBW Strategy/Sherry Matthews and Clean Air Partners staff

FUNDRAISING ACTIVITIES AND LIFECYCLE ALIGNMENT

Year 1: 2018 - Annual Revenue Target = \$70,000
(\$20,000 – grants; \$50,000 – corporate sponsors)

Year 2: 2019 - Annual Revenue Target = *to be determined by board*

Year 3: 2020 - Annual Revenue Target = *to be determined by board*

Each year the Clean Air Partners (CAP) Board will review the annual targets and list of initiatives (Attachment 1: Fundraising Initiatives). The phases and initiative categories will remain the same. The activities and associated deliverables will be updated each year upon review of the fundraising initiatives in the preceding year.

	Education and Outreach	Marketing and Public Awareness		Results
Phase	Grants: School Education Program	Corporate Sponsors: Signature Event	Corporate Sponsors: Media Campaign	Deliverables
Phase 1: Research and Strategic Planning	<ul style="list-style-type: none"> Outline specific funding needs Review prior successful grant proposals Prospect research of past, current and new funders. Prioritizing based on CAP board member connections, mission alignment and source capacity 	<ul style="list-style-type: none"> Determine corporate sponsors to cultivate based on event Review prior corporate sponsors Outreach to board members to generate list of potential sponsors New research on potential sponsors Prioritizing based on CAP board member connections, mission alignment and source capacity 	<ul style="list-style-type: none"> Determine corporate sponsors to cultivate based on campaign Review prior corporate and media sponsors Outreach to board members to generate list of potential sponsors New research on potential sponsors 	<u>1-2 months:</u> <ul style="list-style-type: none"> Prospect lists specific to each opportunity/event Targeted cultivation strategies Grants and sponsorship opportunity calendar developed

	Education and Outreach	Marketing and Public Awareness		Results
Phase	Grants: School Education Program	Corporate Sponsors: Signature Event	Corporate Sponsors: Media Campaign	Deliverables
Phase 2: Cultivation and Content Development	<ul style="list-style-type: none"> • Create proposals and boilerplate content in response to opportunities identified • Funder cultivation and outreach by CAP Board, CAP staff and/or RBW Strategy 	<ul style="list-style-type: none"> • Create giving levels for different corporate sponsorship opportunities • Determine how impact will be measured (what tool(s) will be used?) • Funder cultivation and outreach by CAP Board, CAP staff and/or Sherry Matthews/RBW Strategy • Sponsorship packages based on each sponsor 	<ul style="list-style-type: none"> • Create giving levels for different corporate sponsorship opportunities • Determine how impact will be measured (what tool(s) will be used?) • Funder cultivation and outreach by CAP Board, CAP staff and/or Sherry Matthews/RBW Strategy • Sponsorship packages based on each sponsor 	<p><u>1-2 months to start and ongoing throughout 2018 until fundraising goal(s) reached:</u></p> <ul style="list-style-type: none"> • Targeted board member training on sponsorship cultivation and prospecting • Corporate sponsorship giving levels • Cultivation plans for each key sponsor
Phase 3: Award and Campaign Start-up	<ul style="list-style-type: none"> • Ensure compliance with all reporting requirements • Accurate tracking setup for all grant expenditures • Ensure tracking setup 	<ul style="list-style-type: none"> • Ongoing tracking of campaign funder information and sponsorships received • Alignment of financial information with CAP's accounting system 	<ul style="list-style-type: none"> • Ongoing tracking of event funder information and sponsorships received • Alignment of financial information with CAP's 	<p><u>1-4 months (depending on length of grant and/or campaign):</u></p> <ul style="list-style-type: none"> • Dashboard of funds received to date against fundraising goals

	Education and Outreach	Marketing and Public Awareness		Results
Phase	Grants: School Education Program	Corporate Sponsors: Signature Event	Corporate Sponsors: Media Campaign	Deliverables
	for all data gathered		accounting system	
Phase 4: Management and Monitoring	<ul style="list-style-type: none"> Ongoing data tracking Reporting based on funders' guidelines 	<ul style="list-style-type: none"> Ongoing funder tracking throughout the campaign CAP and Sherry Matthews/RBW Strategy review impact of campaign based on data analysis 	<ul style="list-style-type: none"> CAP and Sherry Matthews/RBW Strategy review impact of event based on data analysis 	<u>TBD (depending on length of grant and/or campaign):</u> <ul style="list-style-type: none"> Data tracking and reporting on impact Ongoing updates of dashboard
Phase 5: Project Closeout	<ul style="list-style-type: none"> Ensure all grant funds are spent and reports are complete 	<ul style="list-style-type: none"> Thanking all sponsors for their participation Conduct lessons learned (SWOT) on the campaign 	<ul style="list-style-type: none"> Thanking all sponsors for their participation Conduct lessons learned (SWOT) on the campaign 	<u>1-2 months post-initiative:</u> <ul style="list-style-type: none"> Reports on each targeted campaign and event with detailed measures of impact and metrics

KEY COLLABORATORS AND PARTNERS

Type and Purpose*
<p>Fundraising Planning</p> <ul style="list-style-type: none"> • Clean Air Partners Board of Directors (plan approval, oversight, and sponsor cultivation) • Clean Air Partners Fundraising Committee (fundraising activity direction) • Managing Director (day to day support, contract oversight, and staff liaison) • Sherry Matthews/RBW Strategy (fundraising leads)
<p>Education and Outreach (School Education Program)</p> <ul style="list-style-type: none"> • Private foundations • Government agencies (federal, state, local) • Community foundations • Corporate foundations • Partnerships with other environmental organizations, university/think-tank/policy affiliates and/or Board members • Meteorologists • Schools/youth outreach programs (District of Columbia, Maryland, and Northern Virginia)
<p>Marketing and Public Awareness (Media Campaign and Signature Event)</p> <ul style="list-style-type: none"> • Media/marketing partners/outlets • Corporate foundations • Corporations (local, regional, national with local presence) • Municipal agencies • Utility companies • Manufacturers • Street teams (grassroots outreach) • Public-at-large

** Clean Air Partners' collaborators and partners will be utilized to the greatest extent possible in three-year fundraising efforts—including as grant partners and/or co-beneficiaries*

SWOT ANALYSIS: FUNDRAISING

Strengths: What about Clean Air Partners will be attractive to funders?

- Strong 20-year success story
- Unique public-private partnership and regional platform
- 31 member Board of Directors that is well respected, integrated in the Baltimore-Washington community, and have deep knowledge of air quality content and programming
- Previous fundraising success, including past grant proposals and sponsorship packages to reference

Weaknesses: What about Clean Air Partners will detract funders?

- Less structured program for fundraising in comparison to marketing/public relations
- Limited articulation of case statement (what is Clean Air Partners' "why")
- Lack of data on previous impact in the community

Fundraising Analysis: How can Clean Air Partners be successful?

Opportunities: What funding sources should Clean Air Partners be capitalizing on that they are not currently?

- Partnerships with other agencies/universities/nonprofits in new and innovative areas
- Wealth of corporate/government funders interested in taking up the cause of clean air
- Previous funders

Threats: What could impact Clean Air Partners' fundraising efforts?

- Competition in fundraising
- Lack of board member time to cultivate relationships
- Some board members are limited in their ability to participate in fundraising efforts due to their roles as elected officials or government employees.
- Diminished fundraising from grantmakers and corporate funders as a larger trend

2018 FUNDRAISING PLAN SYNOPSIS

- Clean Air Partners' fundraising initiatives will adhere to both the programmatic goals and the Work Program structure; the fundraising lifecycle provides the framework for all fundraising activities.
- Annual review and update of the specific initiatives and deliverables based on lessons learned from prior year.
- Enhance board member capacity through targeted training and support throughout funder cultivation process.
- Opportunities for Clean Air Partners' success by capitalizing on the organization's strengths and addressing weaknesses and threats.
- 2018 Performance Measures and Deliverables:
 - **Preparation of a prospect research list** (with cultivation plans for grant funders and sponsors) for all fundraising activities, which includes new, lapsed, and current sponsors. Prospects separated based on priority level
 - **Hold customized Clean Air Partners Board Member training** regarding cultivation and stewardship of sponsors
 - **Preparation of a grants and sponsorship opportunity calendar** to map out fundraising targets by quarters
 - **Development of a fundraising dashboard** to measure grants, signature event, and media campaign progress and board member cultivation activities
 - **Updating sponsorship giving levels** for corporate sponsor opportunities for signature event and media campaign
 - **Development of boilerplate sponsorship packages for customization** for each sponsor to increase number of sponsors and amount of sponsorship dollars received
 - **Creation of boilerplate language for grant applications**, to be customized for various proposals
 - **Cultivation of targeted grant funders and corporate sponsors** who are labeled as "High Priority" in prospect research list
 - **Submission of grant proposals to at least 10 vetted prospects**
 - **Preparation of reports on signature event and media campaign impact** after they occur.