

DEVELOPING FINANCIAL STABILITY:
BUILDING RELATIONSHIPS
TO BUILD INCOME

CORVALLIS SUSTAINABILITY COALITION
DEVELOPMENT PLAN

2015-2017



PO Box 2310, Corvallis, OR 97339
www.sustainablecorvallis.org

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BACKGROUND FOR DEVELOPMENT PLAN

OUR VISION

For the community: Corvallis is a community in which the needs of the present are met without compromising the ability of future generations to meet their own needs. It is a flourishing and thriving city with a vibrant economy that respects, restores, and cares for the community of life.

For our organization: The Corvallis Sustainability Coalition provides grassroots leadership, inspiration, resources, opportunities for collaboration, and innovative solutions to help Corvallis and Benton County become more sustainable.

OUR MISSION

To promote an ecologically, socially, and economically healthy city and county. We will achieve our mission by using the Sustainability Guiding Objectives and a democratic, highly participatory decision-making process.

Sustainability Guiding Objectives - A framework for decision-making based on the four Natural Step system conditions for a sustainable society

Our community will:

1. Reduce and ultimately eliminate our community's contribution to fossil fuel dependence and to wasteful use of scarce metals and minerals. Use renewable resources whenever possible.
2. Reduce and ultimately eliminate our community's contribution to dependence upon persistent chemicals and wasteful use of synthetic substances. Use biologically safe products whenever possible.
3. Reduce and ultimately eliminate our community's contribution to encroachment upon nature (e.g., land, water, wildlife, forests, soil, ecosystems). Protect natural ecosystems.
4. Support people's capacity to meet their basic needs fairly and efficiently.

OUR GOALS

For the community: Our goals for the community in 12 topic areas are outlined in *Community Sustainability: A Framework for Action 2013*.

For our organization:

- To advance the Action Plan (*Community Sustainability: A Framework for Action 2013*)
- To support our volunteers and partners
- To develop financial stability
- To provide staff
- To increase visibility

ORGANIZATION BACKGROUND

Firmly rooted in the City of Corvallis 2020 Vision, the Coalition focused on start-up in 2007, and established its vision, mission, and goals. With its organizational structure in place, the Steering Committee focused on creating the Community Sustainability Action Plan in 2008. Twelve topic areas were identified, with corresponding action teams slated for implementing projects in each of the twelve “branching” areas.

Years three, four and five (2009, 2010, and 2011 respectively), saw the continuation of Quarterly Gatherings, Sustainability Fairs, and Town Halls, as well as initiation of exciting projects from several of our action teams. In 2012, the Steering Committee outlined goals in the 2012-2016 Strategic Plan for moving the Coalition forward. The Coalition also began a review/revision process for the Community Sustainability Action Plan that would last into 2014. The final action team revision was adopted in 2014, and the Coalition has begun implementation of the 2014 Action Framework. Now focused on organizational development, the Coalition seeks to increase the effectiveness of its operating committees and to ensure the continuity of the organization. Fund development is an important part of this process.

DEVELOPMENT PLAN

PURPOSE

This development plan is intended to guide the organization in achieving financial stability, as outlined in the Corvallis Sustainability Coalition 2012-2016 Strategic Plan. Spanning the years 2015-2017, this development plan will direct the financial goal setting of Coalition operating committees and action teams. It will present goals, strategies and actions for *fund development* (non-monetary based) and *fundraising* (monetary based) efforts.

Building relationships to build income is at the core of achieving our financial goals. At the Coalition, we recognize that every contact is a prospective donor of time, talents, and/or funds. We focus on constant stewardship, treating all current and prospective donors with respect and appreciation, and commit to values-driven, donor-focused fund development efforts.

DEVELOPMENT PLAN/STRATEGIC PLAN ALIGNMENT

In alignment with the 2012-2016 Strategic Plan, the development plan will address the following needs for long-term viability of the Coalition.

- Develop regular sources of income.
- Maximize existing event opportunities.
- Integrate fundraising into our activities.
- Seek grants for Coalition operations and projects.

To address these needs, we have identified the following areas to implement.

Needs	Areas to Implement
<i>Develop regular sources of income</i>	Add new funding sources and opportunities Strengthen our monthly giving program
<i>Maximize all existing event opportunities</i>	Create a system for analyzing event effectiveness Establish new giving opportunities at all events
<i>Integrate fundraising into our activities</i>	Create a culture of fundraising Share the fundraising workload
<i>Seek grants for operations and action team projects</i>	Train Coalition volunteers in grant writing Engage contracted grant writers

FUND DEVELOPMENT AND FUNDRAISING

To achieve financial stability, the Coalition will need to use a variety of *fund development and fundraising* goals, strategies and actions. Successful *fundraising* efforts arise from thoughtful and strategic *fund development* efforts, and the two are often intrinsically linked. This plan will outline both categories, and will separate them for clarity.

Fund development is non-monetary based, and refers to all of the activities, processes and relationship building (within the organization) used to create *fundraising* opportunities. Coalition *fund development* efforts include identifying prospects for the major donors gathering and personal campaign with major donors, pursuing endowment and planned giving resources, and creating effective donor management systems.

Fundraising is monetary-based and focused on soliciting funds. It refers to all activities, processes, transactions, and relationship building (outside of the organization) used to solicit money for the organization. Coalition *fundraising* efforts include seeking grants, individual donor and partner organization solicitations, and event and project sponsorships.

FUNDING SOURCES

Funding sources for the Coalition include individual donors, partner organizations, events, action team project sponsorships, grants, and in-kind donations. Currently, our funding sources data is not aligned with Coalition financial record keeping. In 2015, we will align our funding source categories and record keeping with those listed in the “Projected Cash Sources” of the Corvallis Sustainability Coalition 2015 Operating Cash Budget (See appendix).

Individual Donors

The Coalition has an active fundraising program to encourage giving from individual donors. This program incorporates recruitment, recurring donations and solicitations for increased giving. With about 150 individual donors, they account for a large percentage of our income. The Coalition charges no membership fees, and income from individual donors stem from annual solicitations, events and Major Donors Gathering. (Major donors gift \$250 or more). Individual Donor solicitation mailings occur in June, and the Major Donors Gathering is scheduled in September. In 2014, we received \$9779 from our individual donors, accounting for about 19% of our 2014 fundraising revenue.

Strength in our previous fundraising efforts have been due to personal recognition and built relationships with the Coalition Facilitator. Although reasonably effective to date, we want to share the fundraising workload. We will encourage other Coalition volunteers to create income- building relationships, and will provide training to facilitate this. Furthermore, we plan to purchase a donor management system that will meet our current and future needs, and provide access to selected operating committee members other than our Coalition Facilitator. This will allow the Coalition Facilitator to do what she does best- build relationships with our current and potential donors. She is planning a “personal campaign with major donors” in 2015 to create

individualized donor histories, complete with communication and giving preferences. We anticipate a rousing success!

Endowment

In 2013 we solicited donations from individual donors for a capacity building initiative called the “Campaign for Future Generations”. We received \$17,903 for that campaign in 2013, and recognize that a message-focused fundraising campaign is an effective source of income for the Coalition. We will continue this in 2015 with a focus on the Annette Mills Corvallis Sustainability Coalition Endowment. With \$3,000 currently in the fund, we want to raise an additional \$7,000 to meet the \$10,000 principal balance minimum. With this \$10,000 minimum in place, we will be able to use the interest earnings for operating expenses or reinvestment. This information will be presented at our Sustainability Fair/Town Hall in March.

Planned Giving

Donor loyalty is the greatest signifier for identifying prospective planned giving opportunities, and the Coalition will identify donors who have been active over the past 7 years. We have recently been asked to pursue this by one of our major donors, and will have our planned giving structure in place by the end of 2015.

Partner Organizations

Currently we have more than 325 organizational partners, including businesses, non-profits, educational institutions, government entities, and faith communities. Of these partner organizations, approximately 50 of these donate to the Coalition. As there is no membership fee, a solicitation mailing is sent out in November to all of our partner organizations. In 2014, we received \$1950 from our partner organizations, accounting for about 4% of our 2014 fundraising revenue. In addition, partner organizations often provide in-kind donations, event/activity sponsorships, and/or volunteer time to our organization. Several of our partner organizations play critical roles in our action team projects.

We publish a Business of the Week on our website, and encourage partner organizations to present their sustainable businesses at Quarterly Gatherings. At our annual Town Hall we create a “community scrapbook” slide show highlighting the work of our partner organizations over the past year. Partner organizations are energized after being highlighted in the community scrapbook, and excited about the Coalition after Quarterly Gatherings and/or Business of the Week postings. They are often motivated to donate when they have been featured at events or on the website as a Business of the Week. We plan to solicit donations from selected partner organizations shortly after they have been showcased at these activities/events to harness their excitement for our organization.

Events

Major events for the Coalition include the Annual Meeting, Sustainability Fair/Town Hall, and Quarterly Gatherings. Of these, our major source of income is the Sustainability Fair/Town Hall. In 2014, we received \$13,647 from our Sustainability Fair/Town Hall, accounting for about 26% of our 2014 fundraising revenue.

Smaller events include the Eco-film Festival, the Fall Festival, and presentations to partner organizations made by our Coalition Facilitator. Although these are typically outreach events, we received a total of \$2425 in donations, about 5% of our 2014 fundraising revenue. All total, events in 2014 brought in \$16,072, 30% of our total fundraising revenue for 2014. We plan to increase our fundraising at events by highlighting the different ways to donate in marketing materials, announcements and focused messaging.

Action Team Project Sponsorships

The Coalition sponsors several other events and activities such as Car-Free Day, Natural Areas Celebration Week and the Edible Front Yard Garden Tours. Action teams generally solicit funding to cover the costs of these events, but several of our action team leaders have recognized their potential for soliciting donations. As these events grow in popularity, we will identify the target audience and place focused donation/marketing materials at selected action team events in 2015.

Grants

Although grant funding for the Coalition has not been consistent, we secured a two year Meyer Memorial Trust (MMT) grant award in 2014. We want to make grant funds a more consistent source of funding in the future. To accomplish this, we plan to train and mentor a number of our Coalition volunteers in grant writing. The second year MMT award will cover the cost of this training.

We have already secured a \$270 grant from the Evening Garden Club (EGC) for 2015. We anticipate pursuing other small grants through the grant writing training mentioned above.

In-kind Donations

We have not been recording in-kind donations consistently. In 2015, we will begin tracking in-kind donations with the following measures: funding source, donation type, donation amount, first-time donation, recurring donation, and donor contact. Furthermore, we will begin to track volunteer time as an in-kind donation. We will calculate the value of volunteer time by multiplying volunteer hours by \$21.35 an hour, the Independent Sector's estimated value of volunteer work in Oregon. As a grassroots organization with hundreds of volunteers providing hundreds of volunteer hours, we expect to see an incredible demonstration of our impact through in-kind donations!

FUNDING NEEDS

The Coalition needs funding to support operations and action team projects.

Operations

Operations refer to all administrative activities and processes including fundraising, communications and marketing, budget and financial record keeping, and organizational development and planning. Typical

operational expenses include personnel, website maintenance fees, postage and printing, and events such as Quarterly Gatherings and Sustainability Fair/Town Halls.

In 2015, we will be taking on added operational expenses. Although we will not have a permanent employee, we plan to employ contractors to provide training in fundraising, grant writing and volunteer coordination. We will be creating new marketing materials for community outreach, and are looking to purchase volunteer management and donor management software. These are all elements of our capacity building campaign, started in 2013 with the “Campaign for Future Generations” funding. We anticipate these costs will be covered by the capacity building funds, and the second year of the Meyer Memorial Trust grant award.

Action Teams

Our action teams are the site of energy and growth for our organization! Support for long standing action team projects such as the ReUse Directory, Car-Free Day, Natural Areas Celebration Week and Local Eats Week must be continued for our community to flourish. Several of our action teams have been successful fundraisers for these and other projects, securing \$2928 in 2014, about 6% of our 2014 fundraising revenue. But for some action teams, fundraising is a drain on team progress, requiring significant time and effort.

To be successful, we need to share fundraising strategies and best practices amongst all twelve of our action teams. We need to identify action team members who are effective fundraisers, and allow them to share their learning and expertise with other volunteers. We want all action teams to be effective and efficient at raising funds for their projects.

In 2014, each of our twelve action teams received \$200 of set aside funds for projects. This year we have increased that amount to \$300, and plan to increase set aside amounts each year. Set aside amounts for 2016 will be \$400 and \$500 for 2017.

DEVELOPMENT PLAN VISION AND GOALS

Based on the needs identified above, the Coalition Steering Committee has created the following vision and four goals for its three-year Development Plan for fiscal years 2015, 2016 and 2017.

VISION: *Develop financial stability for the Coalition*

This vision is based on the third goal in the 2012-2016 Strategic Plan. In 2015, the Development Committee will review and revise this goal and related strategies to better reflect the current financial status and needs of the Coalition. Learning from this review/revision process will be shared with other operating committees to facilitate the larger strategic plan review scheduled for 2016.

GOALS

The following four goals direct the non-monetary (fund development) and monetary (fundraising) strategies and actions of the Coalition for fiscal years 2015, 2016 and 2017.

- *Distribute responsibility for fundraising to ensure organization continuity* (fund development)
- *Create a culture of fundraising* (fund development)
- *Measure to show impact and progress* (fund development).
- *Increase income by 5% annually* (fundraising)

FUND DEVELOPMENT

In 2014, the Coalition received a two year award from Meyer Memorial Trust (MMT) to build its fundraising capacity. We are creating a culture of fundraising within the Coalition, and have identified training, redistributing the fundraising workload, and measurement, as key areas to address.

In 2015, we will begin to track different components of our fund development activities. We want to ensure that our time and volunteer efforts are optimized. Estimates will be proposed prior to the activity, and measurements will be recorded during and/or post activity. The following areas will be addressed: time period of activity, person (s) responsible for activity, volunteer time in hours, and direct cost in dollars. Indirect cost will be calculated by multiplying volunteer time by \$21.35 per hour.

Fund Development Goals

We have identified three key goals for fund development:

- Distributing responsibility for fundraising to ensure organization continuity
- Creating a culture of fundraising
- Measuring to show impact and progress.

GOAL 1: *Distribute responsibility for fundraising to ensure organization continuity.*

Purpose: Our volunteer Coalition Facilitator does an inordinate amount of fund development and fundraising work for the Coalition. We need to spread the workload and create better systems and structure for completing these tasks.

Strategy: The strategy is to focus on organizational development as it pertains to the fund development and fundraising aspects of the Coalition. We will identify the key roles and responsibilities needed for successful fund development and fundraising. In addition, we will develop an organization plan with fund development/fundraising duties and responsibilities included in each of the job descriptions. With an eye to re-distribute the workload, operating committees and action teams will have increased and/or focused fund development and fundraising responsibilities in alignment with the strategic plan.

Strategy	Key Actions
<i>Develop an organization plan with fund development/fundraising duties and responsibilities included</i>	<ul style="list-style-type: none"> - Create and adopt job descriptions with delineated fund development/fundraising duties and responsibilities for all operating committee members, action team leaders, and Coalition Facilitator - Highlight new fund development/fundraising responsibilities for all operating committee members, action team leaders, and Coalition Facilitator

GOAL 2: *Create a culture of fundraising.*

Purpose: Although we maintain 100% participation in our giving from Steering Committee members, we need more engagement from them in fundraising activities and processes. Many of our Steering Committee members are unfamiliar with effective fund development and fundraising strategies. However, it is now part of their job description to “participate in Coalition fundraising activities”.

Strategy: We plan to provide training in fund development and fundraising for operating committee members and action team leaders. Highlighting the purpose, value, and impact of fundraising at all levels of the Coalition is critical to effective stewardship. Dedicated time for sharing fundraising information, best practices, and idea exchange will be set aside at each monthly meeting, as well as at the annual retreat. We will focus on building relationships to build income.

Strategy	Key Actions
<i>Highlight the purpose, value, and impact of fundraising at all levels of the Coalition</i>	<ul style="list-style-type: none"> - Use webinars, conferences, consultants and reading materials to train Steering Committee members, operating committee members, action team leaders, and all interested volunteers - Encourage all operating committee members to identify fundraising goals, strategies, and roles to adopt for the year - Set aside time at annual Steering Committee retreat and monthly meetings for fundraising information, brainstorming, and updates - Identify Coalition volunteers who demonstrate effective fundraising skills - Create opportunities for skilled fundraisers to share knowledge and expertise - Identify skill sets needed in action teams and operating committees for successful fundraising - Strategically recruit/align volunteers with needed skill sets and interests

GOAL 3: Measure Return on Investment (ROI) to show fundraising impact and progress

Purpose: Our action plan and strategic plan call for measurement to show progress. Without measurement and evaluation, we have no way to show the true impact of what we do, and fundraising efforts suffer. We want to use Return on Investment (ROI) to show the impact of fundraising activities, and demonstrate progress towards financial sustainability.

Strategy: The plan is to create an efficient and informative measurement/data collection system that tracks income received, volunteer time in hours, and direct cost in dollars. Indirect cost will be calculated by multiplying volunteer time by \$21.35 per hour. We will subtract the direct and indirect costs from income received to calculate the ROI.

Strategies	Key Actions
<i>Create measurement/data collection system for fundraising activities</i>	<ul style="list-style-type: none"> - Identify user-friendly data collection/donor management/volunteer management systems that address ROI measures and concepts - Provide training for all operating committees members on ROI concepts, and data collection/donor management/volunteer management systems - Schedule monthly follow-up meetings with operating committees to address data collection concerns, updates, and reviews for continuous improvement - Establish baseline ROI figures for current fundraising activities

FUNDRAISING

We have identified one goal to focus our fundraising efforts, *increasing our income by 5% annually*. Our varied fundraising sources are combined into one category of “Income”, and we will use this figure to calculate our goal increase percentage. With a three year span, we anticipate increasing Coalition income by at least 15% in 2017. We have intentionally kept the percent increase for the goal conservative, recognizing that our efforts will be committed to fund development strategies that may not show financial results for several years.

GOAL 1 : Increase income by 5% annually

Year	2014	2015 (Projected)	2016 (Projected)	2017 (Projected)
<i>Fundraising Income</i>	\$52,911	\$55,557	\$58,335	\$61,252
<i>5% Increase</i>	\$ 2,646	\$ 2,778	\$ 2,917	\$ 3,063
<i>Target for following year</i>	\$55,557	\$58,335	\$61,252	\$64,315

Purpose: We want to build our income and funding sources in a strategic and thoughtful manner. Our fundraising activities and programs must align with our vision, mission and guiding objectives. This may require extra time and research. For example, locating a fossil fuel-free endowment source has been challenging. But with extra work, we were able to designate a donor-focused special fund until a fossil fuel-

free fund can be located. Thoughtful investment and research into funding sources is necessary to maintain the integrity of our organization.

Strategies:

The Coalition will implement fundraising strategies including, but not limited to the following:

- Develop regular sources of income through recurring donations, endowments and planned giving
- Maximize all event opportunities and optimize fundraising events
- Integrate fundraising into activities
- Seek grants for action team projects and operations

Strategy	Key Actions
<i>Develop regular sources of income</i>	<ul style="list-style-type: none"> - Demonstrate values-driven, donor-focused fundraising - Focus on constant stewardship and relationship building - Make donating easy through our website, printed materials and personal contact with donors - Establish an endowment fund - Establish a planned giving program
<i>Maximize all event opportunities and optimize fundraising events</i>	<ul style="list-style-type: none"> - Track event participation levels - Calculate ROI to determine effectiveness of fundraising events - Provide/display engaging marketing materials to event audience - Highlight new donation opportunities at events
<i>Integrate fundraising into activities</i>	<ul style="list-style-type: none"> - Provide training in fundraising - Schedule regular meetings between Communications/Marketing, other operating committees and action teams - Encourage action teams to share stories of sustainable practices/activities - Create tailored marketing materials for activities
<i>Seek grants</i>	<ul style="list-style-type: none"> - Increase grant writing capacity - Establish grant writing training for Coalition volunteers - Engage qualified contracted employee to provide training - Create mentor/mentee grant writing opportunities - Submit a minimum of 4 grants per year

Develop Regular Sources of Income

In 2007, with \$50,000 provided by the City of Corvallis, the Coalition implemented a City Council goal to launch a community-wide sustainability initiative. The Coalition began its own fundraising program, and has successfully sustained itself since 2008. Coalition fundraising sources include the following budgeted categories: grants, individual donations, partner organization sponsorships, in-kind donations and events. We have continued using these funding sources, and in 2013 initiated a capacity building campaign, “Campaign for Future Generations” that successfully raised almost \$18,000 for our organization.

A major donors gathering was added as a thank you event in September 2013, and in September 2014 was used to solicit over \$5700 in donations. In addition, it created donor interest in establishing a long term funding source for the Coalition. To date, we have been unable to find a fossil fuel-free endowment fund to align with our Sustainability Guiding Objectives. Instead, we created a special fund, segregated from ordinary operating accounts, to hold the received funds until a fossil fuel-free investment fund can be found. We will announce the creation of the Annette Mills Corvallis Sustainability Coalition Endowment at the 2015 Sustainability Fair/Town Hall, encouraging donors to consider it as a giving option. Once this is in place, we will turn our focus to explore planned giving opportunities.

Because of the success of the major donors gathering in 2014, we will continue this in 2015, adding a “personal campaign with major donors” in September through December. The campaign will involve face-to-face, personalized contacts with one major donor (two if a major donor couple). The four month span will allow us to set up contacts with several different donors. Involvement of Coalition operating committee members and volunteers will be encouraged!

Maximize existing event opportunities

In 2015, we will begin to track different components of our fundraising activities to determine return on investment (ROI). We want to ensure that our time, money, and volunteer efforts are optimized. Estimates will be proposed prior to the activity, and measurements will be recorded during and/or post activity. The following areas will be addressed: time period of activity, person(s) responsible for activity, volunteer time in hours, direct cost in dollars, indirect cost in dollars, proposed income, actual income and ROI. Indirect cost in dollars will be calculated by multiplying volunteer time in hours by \$21.35 per hour, the Independent Sector’s estimated value of volunteer time in Oregon. Return on Investment (ROI) will be calculated by subtracting direct and indirect cost from actual income. These ROI figures will be used to compare the effectiveness of different activities to improve our fundraising efforts for years 2016 and 2017.

Events

The Quarterly Gatherings and Town Halls are instrumental in maintaining momentum and strengthening our connection with the community, as well as providing opportunities to demonstrate the impact and reach of our work. Although not their primary purpose, these events often ignite increased donations from current partners and community members new to our organization. We want to understand the impact of these events on community participation, so we will begin tracking the following measures in 2015:

- number of event participants (individuals and/or partner organizations)
- number of first-time event participants (individuals and/or partner organizations)
- number of recurring event participants (individuals and/or partner organizations)
- number of event participants (individuals and/or partner organizations) who donate and/or volunteer
- number of first-time event participants (individuals and/or partner organizations) who donate and/or volunteer

- number of recurring event participants (individuals and/or partner organizations) who donate and/or volunteer
- number of recurring event participants (individuals and/or partner organizations) who increase their donation and/or volunteer

Establishing a baseline on these measures will give us a better idea of how to optimize these events for fundraising, volunteer recruitment, and community outreach in years 2016 and 2017.

Annual Meeting and Quarterly Gatherings

The Coalition will continue to hold an Annual Meeting in January and the Quarterly Gatherings in April, July and October of each year. These gatherings showcase the work of partner organizations and community projects focused on sustainability. Primarily community outreach and networking events, we use these forums to thank our donors and solicit donations for future gatherings. We will continue to highlight our additional giving opportunities such as monthly giving.

In addition, we find that partner organizations showcased in the Quarterly Gatherings are often receptive to increased giving following their presentation. We will follow up with a personal contact to showcased partner organizations a week after the Quarterly Gathering.

Sustainability Fair /Town Hall

Initiated in 2008, the Sustainability Fair/Town Hall is an annual event held in March. It attracts a growing number of participants each year, with attendance in 2014 estimated at 500. Although its primary purpose is community education and outreach, income is generated from this event via donations from Town Hall Heroes, Town Hall Sponsorships, exhibitor registration fees, and donations in response to a focused pitch.

Town Hall income is broken into four sources:

- (1) Town Hall Heroes are individuals and/or partner organizations who donate at least \$50 toward the event
- (2) Town Hall Sponsorships are partner organizations who donate between \$150 and \$1000 toward the event
- (3) Exhibitor registration fees
- (4) Donations at the Sustainability Fair/Town Hall in response to focused pitch

Integrate fundraising into our activities

Coalition operating committees and action teams engage the community in a variety of activities, from Car-Free Day to Natural Areas Celebration Week to the Edible Front Yard Garden Tours. They are a natural forum for values-driven, donor-focused fundraising. We want all Coalition volunteers to recognize opportunities for relationship building with interested community members. Knowing that each of these community members is a prospective donor is an important part of building relationships to build income. We will provide training in fundraising to all interested Coalition volunteers to promote donor stewardship at Coalition activities.

In addition, we want marketing materials that show the impact of what we do. We will encourage Coalition volunteers to provide “stories” about their activities for marketing materials. As those materials are created,

we will ensure that they are available for display and sharing at all activities. Tailoring the materials to the activity “audience” would be particularly beneficial. For example, brochures (with enclosed donation envelopes and website donation information) that highlight our transportation and biking projects would be available at Car-Free Day, and materials describing our Food Action Team projects would be available at the Edible Front Yard Garden Tours.

Seek grants for operations and action team projects

Between 2008 and 2014, the Coalition secured several small and large grants which provided a total of \$76,232. Sources for these grants were: \$30,000 from the City of Corvallis in 2010; \$20,000 from the First Alternative Cooperative in 2010; \$2,500 from the League of Women Voters in 2010; \$450 from the OSU Folk Thrift Shop in 2010; \$500 from the OSU Folk Thrift Shop in 2011; and \$22,782 from Meyer Memorial Trust (MMT) in 2014. Funds from the MMT grant provided 43% of the Coalition’s fundraising revenue in 2014. We anticipate a second year award of \$17,218 from the Meyer Memorial Trust, contingent on our submitted report in March 2015.

In 2015, the Coalition released a Request for Proposals (RFP) for Grant Writing. The RFP calls for a contracted employee to provide training in grant writing to interested operating committee and action team members. The objective is not to write grants for the Coalition per se, but to create a cadre of grant writers among our Coalition volunteers. With a group of skilled grant writers, more grant opportunities will be realized, and more and better quality grants will be submitted. This is exactly what the Coalition needs to secure grant funding for operations and action team projects, and to build toward the long-term viability of the organization.

FUND DEVELOPMENT/FUNDRAISING CALENDAR 2015

Jan	Annual Report emailed to Google groups Annual Meeting – Donor recognition & solicitation Solicit Town Hall partners (emails) Solicit Sustainability Fair Exhibitors (emails) Center for Non-Profit Stewardship Conference	June	Mailing to Individuals (Direct Mail #1) Solicit Car Free Day sponsors
Feb	Solicit Steering Committee member donations Solicit Town Hall Hero donations (emails) Draft Endowment Agreement Eco-Film Festival	July	Update Engaged Partners list (ongoing) Plan Volunteer Recognition Picnic Quarterly Gathering - Sponsor and Engaged Partner recognition - Solicit donations via response forms
Mar	Annual Report to City Council Sustainability Fair & Town Hall - Sponsor and Hero recognition - Solicit donations via response envelopes - Letter to “Good Words” re. sponsors Identify Action Team members for grant writing	Aug	Volunteer Recognition Picnic Plan Annual Fall Fundraising Campaign
Apr	Begin 2016 fund development planning process Finalize Endowment Agreement Oregon Non-Profit Leaders Conference Training on Volunteer Recruitment & Retention Quarterly Gathering - Sponsor and Engaged Partner recognition - Solicit donations via response forms	Sept	Major donors gathering Annual Fall Fundraising Campaign (Sept-Oct) Fall Festival Booth Personal campaign with major donors (Sept-Dec)
May	Plan Direct Mail solicitation #1 “Thank you” letters to donors (ongoing) Steering Committee Retreat: Fundraising	Oct	Plan Direct Mail solicitation #2 Quarterly Gathering - Sponsor and Engaged Partner recognition - Solicit donations via response forms
		Nov	HP Agency Fair Mailing to Partner Orgs (Direct Mail #2) Evaluate Fall Fundraising Campaign Finalize draft 2016 Fund Development Plan
		Dec	Prepare Annual Report Approve 2016 Fund Development Plan

(Advertising, tabling events, and other promotions are not included)

CONCLUSION

“Developing Financial Stability: Building Relationships to Build Income” has been created to promote stewardship in all donor contacts at all levels of the Coalition. Treating every contact as a potential source of revenue is where we want to move the thinking of our organization. Through events, activities and values-driven, donor-focused fundraising, we will increase our income at least 15% by 2017.

With training in fundraising, grant writing, and volunteer coordination, we will increase our capacity as outlined in the Meyer Memorial Trust grant award received in 2014. Furthermore, adding data collection and management software for each of these areas in 2015 will allow us to optimize our volunteer time and talents. With tracking in place for many of our core operations and action team projects, we will be able to show impact and progress over the next three years, making our marketing messages and grant applications compelling. By 2017, we will have built relationships and built our income!

ADOPTION AND RESPONSIBILITIES

The Corvallis Sustainability Coalition (Coalition) Development Plan was adopted by the Coalition Steering Committee on March 10, 2015.

This development plan is intended for use by operating committees and action teams of the Corvallis Sustainability Coalition.

All operating committees (Communications/Marketing, Development, Executive, Finance and Steering), and the Coalition Facilitator have joint and separate responsibilities for developing, revising, and implementing this plan.

Operating committees (Communications/Marketing, Development, Executive, Finance), will review this plan annually, amend it if necessary, and present it for Steering Committee approval.

Access to this plan will be made available to all Coalition volunteers through the Corvallis Sustainability Coalition website.

Revised plans will be noted in the Corvallis Sustainability Coalition annual report.

All operating committees and action teams will be notified of changes to this development plan through meetings and/or written notice. Members of operating committees and action teams are responsible for familiarizing themselves with any changes and/or revisions.

In all cases of interpretation of this development plan, the Coalition Steering Committee decisions are final.