

AAAPP Strategic Plan: September 2022 ~ September 2025

QUARTERLY WORKGROUP PROGRESS REPORT: FUNDING

REPORT DATE: March 2024

WORKGROUP:

Board Champion: Dr. Stuart Strikowsky, Board Vice President
 Members: Judge George Jirotko, Dave Alvarez, Board Treasurer, Chris Comstock,, Commissioner Christine Fitzpatrick
 Staff Liaisons: Ann Marie Winter, Executive Director

BOARD GOAL: Increase & Diversify Funding ~ Funding Workgroup

BOARD ISSUE: How do we systematically increase diversified and unrestricted funding that is sustainable and also increase funding to allow AAAPP to respond to emerging community needs.

STRATEGY 1: Systematically increase gifts from individuals

How we will measure success:

- **Increase in number of gifts from individuals**

Target date for completion: 2024

Board Responsibilities:

1. Board members systematically thank existing donors
2. Speaking engagements (in conjunction with Marketing Workgroup)

Choose one

- Completed: Successfully/Unsuccessfully
- In Progress
- Stalled

NARRATIVE SUMMARY OF PROGRESS OR PROBLEMS:

We are working on a consistent message from board members for thanking existing donors. Thank you's are presently done by our executive director and any board member associated with the gift.

WORKGROUP RECOMMENDATIONS:

*Achieve a consistent message
 Train board members in thank you calls and skills for speaking engagements*

STRATEGY 2: Restructure the Annual Luncheon to increase net dollars raised.

How we will measure success:

- **More money raised**
- **Increased attendance of potential qualified donor prospects**

Target date for completion: Spring 2024

Board Responsibilities:

1. Sponsor tables
2. Identify additional donor prospect
3. Invite donor prospects to see AAAPP programs in action

Choose one

NARRATIVE SUMMARY OF PROGRESS OR PROBLEMS:

We have instituted measures including sponsor tables and identifying donor prospects with board input.

WORKGROUP RECOMMENDATIONS:

Continue soliciting sponsor/donor prospects with the help of Mandy Clouinger of Relentless Partner Consulting.

STRATEGY 3: Implement a planned gift program

How we will measure success:

- The number of inquiries and notifications regarding estate planning has increased

Target date for completion: Marketing materials developed and in place by March 2025

Board Responsibilities:

1. Relationship management with people who inquire/notify

Choose one

- Completed: Successfully/Unsuccessfully
- In Progress
- Stalled

NARRATIVE SUMMARY OF PROGRESS OR PROBLEMS:

Marketing materials are being developed regarding estate planning and other forms of planned giving.

WORKGROUP RECOMMENDATIONS:

Revisit this strategy when training and materials are available.