

AAAPP Strategic Plan: September 2022 ~ September 2025

QUARTERLY WORKGROUP PROGRESS REPORT: FUNDING

REPORT DATE: _____

AGENDA ITEM #15 C
03/20/2023

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 & Paula Moore, Chief Financial Officer

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: January 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:

WORKGROUP RECOMMENDATIONS:

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 2023

Board Responsibilities:

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

Choose one

QUARTERLY WORKGROUP PROGRESS REPORT: FUNDING

- Completed: Successfully/Unsuccessfully
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NARRATIVE SUMMARY OF PROGRESS OR PROBLEMS:

WORKGROUP RECOMMENDATIONS:

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 December 2023

Board Responsibilities:

1. Relationship management with people who inquire/notify

Choose one

- Completed: Successfully/Unsuccessfully
- In Progress
- Stalled

NARRATIVE SUMMARY OF PROGRESS OR PROBLEMS:

WORKGROUP RECOMMENDATIONS: