

Christine Dawson
Philanthropic Services/ Resource Development
2018 Goals:

Staff Development: Provide training, mentoring and professional development opportunities to Philanthropic Services staff so that we can increase our donor engagement, fund development and planned giving objectives.

1. Educate the public about philanthropy

- Utilize best practices to develop tools and resources for families, individuals and private family foundations to cultivate philanthropy and attract new fundholders
- Implement tools and webinars from National Center for Family Philanthropy to promote philanthropy to donor advisors, private family foundations, professional advisors and prospects.
- Work with communications to develop targeted messages/audiences and new communication vehicles:
 - New Tax Law Strategies for DAFs
 - CGA Toolkit: to share with non-profits and their donors. The toolkit will include marketing promotions and sample donor stories so that Monterey County non-profits can market CGAs to their constituents through their own newsletters and websites.
- Donor education events
 - Focus on topics of interest to our donors, including planned giving, philanthropic planning, issue areas (homelessness, education, arts, etc), and connecting donors with common interests
- Improve efforts to tell our story
 - Utilize existing donors, prospects, and nonprofits
 - Donor education pieces and personal stories of giving in e-blasts, newsletter and blog
- Optimize Crescendo
 - Target emails to the professional advisor, donor, and prospects communities
 - Incorporate CFMC stories into marketing

2. Grow the CFMC philanthropic assets

Utilize the Philanthropic Services Department to form new partnerships, enhance fund holder philanthropy and further increase assets

- Provide customized philanthropic services to assist private foundations, corporations, small businesses, individuals, families and affiliate funds.

- Donor Engagement Plan: Develop and implement a donor engagement and stewardship plan for philanthropic services staff to engage CFMC fund holders with their grantmaking and estate planning through donor advised funds.
 - Personalize DA fund contacts

Integrate communication strategies into resource development/philanthropic services.

- Update NMAT sheets
- Develop a communications/development calendar to target messages and coordinate communications throughout the year.
- Annual Legacy Society Newsletter

Leverage current relationships and asset base to grow the Foundation

- Increase face to face visits with current fund holders and partners.
- Face to face meetings with current Legacy Society Members
- Utilize events such as the Legacy Society luncheon, Celebration of Philanthropy, and Women's Fund Luncheon to introduce CFMC to prospects and strengthen relationships with current donors.
 - Encourage all board members and other supporters to bring friends and other guests to various events/programs.
- Develop and implement protocols and procedures for Donor and Gift Modules to track relationships and measure data in FIMS.

Achieve growth through proactive approach to potential fund holders and their professional advisors

- Deepen relationship with current fund holders and PAs
- Offer a variety of entry points for potential donors (fund creation, contributions to existing funds and/or co-investment in grant making)
- Increase the frequency and depth of conversations professional advisors have with their clients about philanthropy (including CFMC)
- Participate in events and make presentations to raise profile of CFMC

Target planned giving activities to build stronger relationships with Professional Advisors

- Professional Advisor Luncheon: Hold 1st Annual Professional Advisor luncheon. Utilize a keynote speaker on area of interest. We plan to start small and test the interest with the PA community.
- Hold Bi-Annual Professional Advisor Council Meetings, made up of attorneys, accountants, investment advisors and community members
- Increase presentations and collaboration with local estate planning groups

3. College Futures Monterey

- Increase partnership with the College Futures Foundation and co-investment with donors in 2018.

4. Enhance fund holder philanthropy

Enhance the quality, frequency and relevance of services and support provided to donor advisors and other fund holders

- Develop donor engagement calendars for PSOs
- Implement donor education events
- Focus on stewardship and highlight investments/financial transparency
- Develop and maintain comprehensive records on all fund holders
- Leverage DonorCentral and Crescendo to create value for donor advisors
- Provide tools and educational resources to strengthen philanthropic families, encourage local giving and donor satisfaction and attract other donors

Create opportunities for fund holders to partner with CFMC on grant making

- Increase Co-Investment with our Community Impact Grants through improved communications and marketing through “Giving Together”
- Better understand donor advisors’ interests, and develop approaches to match these with high priority local needs and issues identified by CFMC
- Leverage year-end giving through Monterey County Gives!

5. Seek and align with funding partners to realize greater community impacts

Proactively seek funding partners for CFMC funding priorities

- Outreach to private/family foundations to encourage co-investment with CFMC (short term) and create opportunity for transition to donor advised fund, private foundation services or planned gift (long term)
- Strategically approach other funders on CFMC priorities such as David and Lucile Packard Foundation, Peggy and Jack Baskin Foundation, Monterey Peninsula Foundation, College Futures Foundation and the Claire Giannini Fund.

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6. Engage a more diverse philanthropic donor base

Develop a countywide and diverse focus for outreach to potential philanthropic partners

- Focus outreach for additional affiliate funds throughout the county
 - Big Sur
- Siembra Latinos Fund
 - Implementation of a resource development plan and grant making procedures for 2018.