

## Annual Development Plan for \_\_\_\_\_

<b>Date of Plan:</b>		<b>October 17, 2023</b>		
<b>Goal #1 - Raise \$6M from individual donors for research</b>				
<b>Objective #1 - Build and cultivate new relationships</b>		<b>Estimated Timeline</b>	<b>Personnel Responsible</b>	<b>Measurement</b>
	1) Find and bring in new, passionate donors (monthly or yearly)	Q1-Q2	Eric Alley	donor numbers up by 15%
	2) Go through old records and see what people have donated in the past, but not recently and contact them. Also check in on volunteers who have been out of the loop	Q1	Janae Davis + Amelia Rinker	get 30% of past donors to donate
	3) Host meet and greets with staff for donors/friends (have donors/volunteers bring friends to organization)	Q3	Stacey Simmonds/Alan Hakim	gain at least 10 new donors (big or small)
<b>Objective #2 - Major Gifts</b>		<b>Estimated Timeline</b>	<b>Personnel Responsible</b>	<b>Measurement</b>
	1) Start a new elite club/perks for major gift donors (maybe like a yearly gala)	Q4	Faye Moran	plan actually gets scheduled
	2) Compile list of long-time donors who can afford making a bigger donation	Q1	financial volunteers, looked over by Eric	list is completed
	3) Build relationships with donors that have the resources to give a major gift	Q1-Q4	Lara Bloom + Sam Lynch	get (or be close to) 1 major gift donation
<b>Objective #3 - Marketing/Storytelling</b>		<b>Estimated Timeline</b>	<b>Personnel Responsible</b>	<b>Measurement</b>
	1) Find new stories/people with EDS to highlight for socials/newsletters	Q1	Mark Martino + Scarlett Eagle	at least 3 stories posted + shared on socials
	2) Create a new video series of said stories for visual media advertising	Q2	Scarlett Eagle + Eric Simons	gains 30% more engagement on social
	3) Start up a TikTok account and gain traction	Q1	Scarlett Eagle + volunteers	get at least 2 videos to go viral
<b>Goal #2 - Get Project ECHO more traction in the medical (and mainstream) world.</b>				
<b>Objective #1 - Create and execute marketing plan</b>		<b>Estimated Timeline</b>	<b>Personnel Responsible</b>	<b>Measurement</b>
	1) Start filming videos to show the benefits of ECHO (video series about who the information helped)	Q2	Paul Gardener + Erin Simons + Jack A.	videos successfully made and posted

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	2) Compile a sheet of statistics/analytics for how many people sign up for ECHO	Q3	Charli Peck	statistics are completed
	3) Come up with a public hashtag and get people to share their ECHO stories on social	Q3	Erin Simons + marketing	have at least 1,000 posts using # by 5 months
<b>Objective #2 - Create more content for ECHO</b>		<b>Estimated Timeline</b>	<b>Personnel Responsible</b>	<b>Measurement</b>
	1) Find new researchers/educators to make a video about working with EDS and how to ask for accommodations	Q2-Q3	Paul Gardener + Rebecca Gluck	video is uploaded to the website
	2) Turn parts of the lectures into bite-sized pieces of info for TikTok and social media clips, possibly make it a social media series	Q3	Scarlett Eagle + video team	videos are complete and uploaded to socials
	3) Make a section of the weekly newsletter dedicated to ECHO	Q3	Erin Simons + Mark Martino	successfully have the section on newsletter
<b>Objective #3 - Fundraising/Grants</b>		<b>Estimated Timeline</b>	<b>Personnel Responsible</b>	<b>Measurement</b>
	1) Create a presentation for donors to get more donations	Q1, Q4	Alan Hakim + Eric Alley + Paul Gardener	got 40% of donors to pitch in more \$
	2) Start a social media campaign called "ECHOing awareness" to raise \$50,000	Q2-Q3	Rebecca Gluck + Danielle Hohlier +	raised \$50,000 in 2 years
	3) Search and find at least 5 different grants to fund this project	Q1-Q2	Oumaima Nehaili + Janae Davis	successfully land one grant
<b>Goal #3 - Revive Loose Connections eMagazine</b>				
<b>Objective #1 - Figure out consistency</b>		<b>Estimated Timeline</b>	<b>Personnel Responsible</b>	<b>Measurement</b>
	1) Come up with yearly plan on how many times we want to publish (biannually, annually, monthly, bimonthly) + themes, submission requirements	Q1	Mark Martino + magazine volunteers	we reach a decision
	2) Get at least 25 submissions for essays, poetry, art, etc. for newest edition	Q2	Mark Martino	have enough content to create issue
	3) Figure out layout/design theme. Have graphic designer come up with many different samples to choose from	Q2-Q3	Jack Annable + Mark Martino	design layout decision made
<b>Objective #2 - Networking/Volunteer support</b>		<b>Estimated Timeline</b>	<b>Personnel Responsible</b>	<b>Measurement</b>
	1) Meet with doctors/professionals and ask to contribute research/expertise for magazine	QQ2	Mark M. + Scarlett E. + Rebecca G.	5 professionals write articles for the issue

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	2) Call a meeting with all volunteers to see who can help with magazine	Q3-Q4	Mark Martino	have at least 10 volunteers sign up
	3) Make social media posts promoting the launch with little previews of stories that will be in the newest issue	Q3-Q4	Scarlett Eagle + Jack Annable + Erin S.	uploading at least 15 social media posts to
<b>Objective #3 - Finalization</b>		<b>Estimated Timeline</b>	<b>Personnel Responsible</b>	<b>Measurement</b>
	1) Have entire magazine go through team of editors to make sure everything is grammatically correct	Q3-Q4 (needs to be finished first)	Mark Martino	final draft is completed
	2) Make sure all sponsors + donations get gratitude in the emagazine	Q2-Q3	Mark Martino + Janae Davis	all sponsors were double checked and in order
	3) Get all emails on emagazine list ready to send out the publication on MailChimp	Q3	Nina Fernandez	everyone sucessfully gets email
<b>Goal #4 - Global Learning Coference in July 2024</b>				
<b>Objective #1 - Marketing + Engagement</b>		<b>Estimated Timeline</b>	<b>Personnel Responsible</b>	<b>Measurement</b>
	1) Promote the event and schedule on social media weekly (and daily as the ticket deadline gets closer)	Q2-Q3	Erin Simons + Stacey Simmonds	have at least 1,000 people sign up for the
	2) Share information about the speakers (ex: published books/works/merch)	Q3-Q4	Scarlett Eagle +Faye Moran	positive engagement + hype on socials up 20%
	3) Team up with other NPOs (such as Standing Up to POTS) to promote the event	Q1	Lara Bloom + Janae Davis	successfully partner with 2 organizations
<b>Objective #2 - Preparation/Organization</b>		<b>Estimated Timeline</b>	<b>Personnel Responsible</b>	<b>Measurement</b>
	1) Get website page and information ready and uploaded to main EDS website	Q3-Q4	Charli Peck	information is live on website
	2) Have at least 30 different speakers for the 3-day conference	Q3	Stacey Simmonds +Faye Moran + Lara	sucessfully got a roster of speakers
	3) Plan out the event/who speaks when + where	Q4	Stacey Simmonds, Sinead Waugh	successfully have event planned out
<b>Objective #3 - Sponsorships/Partnerships</b>		<b>Estimated Timeline</b>	<b>Personnel Responsible</b>	<b>Measurement</b>
	1) Get donors involved in the event, show statistics of where their money is aiding the event	Q3	Eric Alley + Lara Bloom + Sam Lynch	get 20% of donors to give more for the event

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	2) Look to get other nonprofits, such as EDS Wellness, Standing Up to POTS, Hypermobility Syndromes Association, Mast Cell Action, etc.	Q1	Eric Alley	perks are established
	3) Provide sponsors/donors with a info packet filled with graphics and statistics	Q4	Janae Davis + Stacey Simmonds + Jack A.	packet is created and sent to donors

**Goal #5 - Grow Volunteers and Create Unity within Staff**

<b>Objective #1 - Grow regular volunteer numbers by 20%</b>		<b>Estimated Timeline</b>	<b>Personnel Responsible</b>	<b>Measurement</b>
	1) Speak with key volunteers/coordinators to figure out ideas of how to bring in new people	Q2	Emily Shotbolt + Nina Fernandez	have meeting and get a plan set in stone
	2) Meet with social media team for campaign/giveaway contests for new volunteers	Q2	Nina Fernandez + Rebecca Gluck	get campaign figured out + posted online
	3) Host bi-weekly meet ups (like dinner or movie night) to create community within volunteers	Q3-Q4	Stacey Simmonds + volunteers	successfully host bi-weekly meet ups for a
<b>Objective #2 - Building staff trust/skills</b>		<b>Estimated Timeline</b>	<b>Personnel Responsible</b>	<b>Measurement</b>
	1) Leadership meets to discuss team exercises and activities for a team weekend (deciding date/time as well)	Q4	Rosie Harper + Lara Bloom+ Sam Lynch	create a foundation for weekend and scheduled
	2) Create staff awards to hand out/recognize everything everyone on the team has done	Q4	Lara Bloom + Sindead Waugh	make staff awards and present them
	3) Ask/create feedback forum for staff to share what they think are the NPO's strengths/weaknesses, what skills they want to learn this upcoming year	Q4	Lara Bloom + Rosie Harper	meet with staff on results and discuss

**For Goal-Setting, Functional Areas to Consider -**

Grants, Planned Giving, Annual Fund, Campaigns, Direct Mail, Major Gifts, Corporate Giving, Marketing, Communications, Board Engagement, Events, Volunteer Engagement, Program Support, Project Support, Personnel Needs, Culture of Philanthropy, Collaborative Efforts, Donor Stewardship, Technology Tools

**Set SMART Goals: Specific, Measurable, Achievable, Relevant, and Time-Bound.**

Functional Areas to Consider - Grants, Planned Giving, Annual Fund, Campaigns, Direct Mail, Major Gifts, Corporate Giving, Marketing, Communications, Board Engagement, Events, Volunteer Engagement, Program Support, Project Support, Personnel

Key Activity to Achieve Goal	Functional Area	Assigned To / Will Assist	Month Value												Important Details about Task	Date Done	Notes	
			Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec				
Find and bring in new, passionate donors--could be individuals or businesses (monthly or yearly donors)	Individual Giving, Corporate Giving, Relationship Building	Eric Alley	X	X	X	X									1, 2, 3, 4	Possibly meet with similar organizations, or find new people passionate about EDS		
Contact past (and not recent) donors to see if they'd like to donate	Relationship Building/Donor Stewardship	Janae D. + Amelia R.	X	X											1, 2	Keep track of who is contact and how many people respond positively for statistics		
Host meet and greets with staff for donors/friends	Donor Stewardship, Building Annual Fund, Events	Stacey S. + Alan H.						X							7	Have donors/volunteers/board members bring friends not affiliated w/ org.		
Start a new elite club/perks for major gift donors (maybe like a yearly gala)	Relationship Building, Major Gifts, Events	Faye Moran									X	X			11, 12	Create a theme, and try and find a way to tie donations into the event		
Compile list of long-time donors who can afford making a bigger donation	Major Gifts, Annual Fund, Research/Program Support	financial volunteers, Eric A.	X	X											1, 2	Use the NPO's software to see who could give a bigger donation, get a handful of donors		
Build relationships with donors that have the resources to give a major gift	Major Gift, Donor Stewardship	Lara Bloom + Sam Lynch	X		X	X			X	X	X	X			1, 4, 5, 8, 10, 12	Build relationships with major donors slowly (but also steady)		
Find new stories/people with EDS that volunteer or are affiliated to highlight for social/newsletters	Marketing/Comm, Program Support, Volunteer Engagement	Mark M. + Scarlett E.	X	X											1, 2	Look for EDS influencers that have a following, can help bring in more viewers		
Create a new video series of said stories for visual media advertising	Marketing, Volunteer Engagement, Philanthropy	Scarlett Eagle + Eric Simons			X	X	X								4, 5, 6	Make sure camera equipment is up to date and used correctly, keep videos below 5 min		
Start up a TikTok account and gain traction	Areas of Growth Opportunity, Marketing	Scarlett Eagle + volunteers	X												1	Keep up with trends to find ways to go viral		
Start filming videos to show the benefits of ECHO + make graphics to provide bite-sized pieces of huge info for the public	Marketing, Program Support	Paul G. + Erin S. + Jack A.					X	X							5, 6	Video series is focused on who the information from ECHO helped and how		
Compile a sheet of statistics/analytics for how many people sign up for ECHO	Development Operations/Analytics	Charli Peck						X							7	make them kind of like a cliffhanger/making people want more		
Create a public hashtag and get people to share their ECHO stories on social	Marketing, Program Support	Erin Simons + marketing						X	X						7, 8	Make the # catchy, find influencers/hashtag accounts to gain traction		

## ANNUAL DEVELOPMENT PLAN

Key Metrics & Goals				
Your Key Indicators (Complete this section)	Actuals - 2 Years Ago (Complete this section. Estimate if needed)	Last Year's Actuals (Complete this section. Estimate if needed)	This Year's Goals (Complete this section)	This Year's Actuals (Leave blank - Fill in at year-end)
Active Donors	5,167	5,235	5,450	
New Donors	830	856	900	
Total # Facebook Followers on @ehlers.danlos	115,000	120,000	125,000	
Total \$ Amount Raised (not estimated)	\$4,237,967.00	\$4,825,754.00	\$5,549,617.00	
Total # of Grants Awarded by EDS Society for Research	18	23	26	
Total \$ of Donations Given to Research (not estimated)	\$1,265,000.00	\$1,577,582.00	\$1,735,340.00	
# of People Joining the Global Registry	10,000	13,000	15,000	
EDS ECHO Participants (not estimated)	980	1,700	1,900	
End of Year Campaign \$ Total (not estimated)	didn't exist	\$323,119.39	\$330,500.00	
Total \$ Corporate Donations	\$220,782	\$227,591.00	\$232,600.00	
Total \$ Individual Donations	\$3,752,891.00	\$3,997,948.00	\$4,597,640.00	
Total \$ of Grant Donations awarded to the Ehlers-Danlos Society	\$15,700.00	\$17,094.00	\$19,658.00	

<b>Total \$ Raised from Events</b>	\$495,653.00	\$583,121.00	\$670,589.00	
<b>Total # of guests at ECHO Summit Events</b>	didn't exist	2,023	2,400	
<b>Total Fundraising Expenses</b>	\$313,803.00	\$343,383.00	\$340,000.00	

<b>Year End Evaluation Key:</b>	Green	Target met or exceeded
	Yellow	Target not met, improved since baseline
	Red	Target not met, declined since baseline
	<i>No Color</i>	N/A; TBD; or new outcome



### Donor Stewardship Calendar - SAMPLE

Donors	Receipt Mailed	Receipt Emailed	Direct Mail Appeal	Year End IRS letter	Enews	Thank You Note	Call from Staff	Call from Board	Email Update Personalized	Holiday card	Printed Event Invitation	Event Email Invitation	Video Email	Sponsor Social Media Tagged Post	Total Touches Per Year
<b>Donors (Single Gifts)</b>															
<b>\$1-99</b>	when gift received	when gift received	December & April	January	Quarterly							Yearly x 3			<b>12</b>
<b>\$100-299</b>	when gift received	when gift received	December & April	January	Quarterly							Yearly x 3			<b>12</b>
<b>\$300-499</b>	when gift received	when gift received	December & April	January	Quarterly	when \$300 donation received OR at least once per year						Yearly x 3			<b>13+</b>
<b>\$501-999</b>	when gift received	when gift received	December & April	January	Quarterly	when \$300 donation received OR at least once per year	when donation received (at least yearly)				Yearly	Yearly x 3		During Event Season	<b>16+</b>
<b>\$1,000-4,999</b>	when gift received	when gift received	December & April	January	Quarterly	when donation received	when donation received (at least yearly)	July	December	Yearly	Yearly x 3	November (Thankful for you)	During Event Season		<b>19+</b>
<b>\$5,000-9,999</b>	when gift received	when gift received	December & April	January	Quarterly	when donation received	when donation received	July	December	Yearly	Yearly x 3	November (Thankful for you)	During Event Season		<b>19+</b>
<b>Major Donors (Total Giving)</b>															

Donors	Receipt Mailed	Receipt Emailed	Direct Mail Appeal	Year End IRS letter	Enews	Thank You Note	Call from Staff	Call from Board	Email Update Personalized	Holiday card	Printed Event Invitation	Event Email Invitation	Video Email	Sponsor Social Media Tagged Post	Total Touches Per Year
\$10,000-24,999	when gift received	when gift received	December & April	January	Quarterly	when donation received		when donation received	July	December	Yearly	Yearly x 3	November (Thankful for you)	During Event Season	19+
\$25,000-49,999	when gift received	when gift received	December & April	January	Quarterly	when donation received		when donation received	July	December	Yearly	Yearly x 3	November (Thankful for you)		
\$50,000-99,000	when gift received	when gift received	December & April	January	Quarterly	when donation received		when donation received	July	December	Yearly	Yearly x 3	November (Thankful for you)		
\$100,000-249,999	when gift received	when gift received	December & April	January	Quarterly	when donation received		when donation received	July	December	Yearly	Yearly x 3	November (Thankful for you)		
\$250,000+	when gift received	when gift received	December & April	January	Quarterly	when donation received		when donation received	July	December	Yearly	Yearly x 3	November (Thankful for you)		