



The Family Tree

Development Committee Meeting

Tuesday, September 8, 2020

Gary Marino & Tom Peltier, Co-Chairs

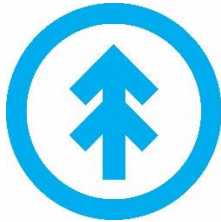
- I. Welcome & Approval of Minutes – Gary
- II. Mission Moment – Pat
- III. Review and Approve Committee Job Description – Tom
- IV. FY 2021 Annual Fundraising Plan – Development Staff
 - a. Annual Fund & Major Gifts – Connie & Mary
 - Review Plan
 - Success To-date
 - Fall Initiatives - United Way Campaign; Fall Appeals-Board Solicited; Giving Tuesday; E-Appeals
 - b. Foundations & Grants -- Yvette
 - Review Plan
 - Success To-date
 - c. Special Events -- Kelley
 - Review Plan
 - Update on Lace Up & Great Chefs'
 - Success To-date
- V. Communications Update, Engaging Our Supporters – Allie
 - a. Blog/Story telling
 - b. Social Media
 - c. Email series for online donors
- VI. Donor Recognition Event – Mary
- VII. Challenging Fundraising Environment – Mary
- VIII. Assignments – Sally
 - a. Board help cultivating supporters
 - b. Review your Fundraising Plan & Board Solicited Appeal List
- IX. Next Meeting: Tuesday, November 3, 2020

Important Dates

General Board Meeting Tuesday, October 20, 2020 – 5:30pm - TFT

Next Committee Meeting - Wednesday, November 3, 2020 – 8:00 am – The Family Tree

An Evening to Give Thanks – Thursday, November 19, 2020 – 6:30pm – Linwoods



The Family Tree

Development Committee Meeting

Tuesday, May 5, 2020

Minutes

Members Present: Tom Peltier, Gary Marino, Stephanie Adler, John Meyerhoff, Sarah Kahl, Josh Slater, Brian Weatherford, Elizabeth Wurster

Members excused: Jeanne Aarsand, Sally Bauer, Tom Hauser, Rachel Rubin, Sean Murphy,

Staff Present: Pat Cronin, Mary Francioli, Yvette Rose, Erik Weber, Connie Anderton, Kelley Harrison, Lindsay Jacks

Agenda

- I. Welcome & Approval of Minutes - Gary
- II. Mission Moment - Pat
- III. Fundraising Progress through April - Mary
- IV. Fundraising Plan Update - Development Staff
 - a. Completed Actions Through March
 - b. Priorities Now - June
- V. Special Events - Kelley
 - a. Best of Baltimore – Thursday, August
 - b. FamFest – Saturday, September
- VI. Communications Update – Erik & Allie
 - a. Content Marketing
 - b. Website
 - c. Flip the Script – May
- VII. Questions & Comments – Tom
- VIII. Next Meeting: TBD

Important Dates

Tuesday, June 2, 2020 TBD

Recorder: Allie Cook

ISSUE #1 – Welcome & Approval of Minutes

SUMMARY OF DISCUSSION: Gary Marino welcomed everyone to the meeting, thanked them for joining and asked to review the minutes. Gary motioned to approve, John Meyerhoff approved the minutes and Josh Slater seconded.

ISSUE #2 – Mission Moment

SUMMARY OF DISCUSSION: Pat Cronin spoke about all the creative ways staff have been doing to serve our families. Our home visitors are doing really well with tele-visits, having some of the highest completions rates we have seen. We have had a lot of our young moms really struggling. Going into isolation right after giving birth is difficult. We are doing our best to get information to our home visitors in order to be sure they are screening for mental health needs of the families they are serving. Healthy Families staff are also hosting a weekly story time on zoom and the families are really loving it.

ISSUE #3 – FY20 Annual Fundraising Plan Status

SUMMARY OF DISCUSSION: Mary gave an update on our fundraising progress through April. So far for contributions, we have raised \$888,139 with \$1,861 left to raise. Our contributions numbers took a big increase due to two really nice \$50,000 gifts from amazing supporters. One is from the O'Neil's who gave us their last installment of the three-year pledge early. Foundations have raised \$444,950 and we have \$67,500 left to raise. Our total income from events is \$587,882, we are short of our goal \$152,118. We have \$221,479 left to raise total.

Contributions: Connie has been reaching out to all new donors. One in particular gave a nice gift and when Connie asked how they found us; she was happy to hear that she saw us on a Maryland Charity Campaign information. We have sent an e-appeal and we are starting to get money in from that, we have also mailed an appeal to our smaller donors, under \$1,000. We worked with the Kappa Delta's at UMD to promote child abuse prevention month and ask for donations. Over the next three months we will be working on the next CITC application soon and participating in an additional Giving Tuesday. We won't be pushing that too much because of the Great Chefs Event.

Major Gifts: At the beginning of the stay at home order, we sent an update about how our work continues with a personalized note to our major donors. We will be sending out a second update in April. We have been making calls and sending notes to Grand Oak Members to keep everyone updated. In June, we will be sending welcome letters to new Grand Oak members as well as having zoom meetings with some donors and family foundations to cultivate our relationships with them. We need to remind our donors that we are part of the urgent response to COVID although most people only think about food pantries and shelter, we are included and still need support. We need to be sure our donors know that. Mary spoke about her recent meeting with JP Morgan. They wanted to talk with us to see how they could support in a bigger way. They started with a Great Chefs' Sponsorship and wanted to do more. We laid out the full year to give them options. Normally, we target one event or way to support at a time, this was unique to us. We are looking to get more meetings like this set up and will evaluate if this is a strategy we should use going forward. We also received a gift from Exelon Foundation honoring Brian Weatherford's commitment to this cause

Events: All of our events for this fiscal year have been completed. Obviously, our virtual Great Chefs' was not what we wanted, but it did bring in some new bidders and donors. Our silent

auction made a little more than last year, with fewer items, but not having a live auction did hurt our bottom line. We also had more donors in fund a need than typically and we raised more than usual. The committee asked how much we spent this year compared to last and Kelley reported we spent significantly less, but did pay for the videos and paid a company to run the live stream for us. The committee also asked where the new donors came from, we think they are all friends of friends but we are contacting the new donors to thank them so we will try to find out how they connected with us. We have received a few calls from other nonprofits to see how we pulled off the virtual event. It is nice to be seen as a resource for other groups. Thanks again to Erik for his leadership with this. Over the next three months, we will need to see what happens with the pandemic to move forward with the planning for these events. We are not sure if we will be able to have any large groups together by that time of year. The Baltimore Sun says they are still hosting their Best of Baltimore event in late July. For FamFest, we know we cannot get a permit from the City or the school right now which is what we would need to have the event. We don't think we will have as much of turn out for a virtual Famfest. Mary and Kelley asked the committee to send idea's or examples they see. Pat also mentioned the BCCCRC conference on social and emotional wellness they typically have in the fall. We discussed trying to make this a fundraiser, but we do not think this is the year, we are not sure if we will be able to have it.

Foundations: Yvette reported that we have recognized \$444,950 in foundation revenue through April 2020. In the last three months, we have received \$95,000 in the last three months 7 government grants with \$85,000 of that being in the last three months. We received a government grant of \$19,000 for furniture and equipment needs. We have \$225,000 pending in 5 private foundation grants and \$42,000 pending for our ACE Interface program. We have had a few Zoom calls with prospective funders, United Healthcare and Arnie Richman from the Richman Family Foundation. We have sent our COVID-19 response to our funders and some prospective funders and submitted our various monthly and quarterly program reports. Some foundations have sent their gifts in early. Others unexpected gifts have also come in during this time. This does not make up for some of the foundations that have shifted priorities to fund only COVID immediate needs. We submitted a \$35,000 ask for BCCCRC. Over the next three months, we have a number of asks that will be submitted soon including the Henry and Ruth Blaustein Rosenberg Foundation for General Operating. Typically, we receive \$30,000 over two years, a grant we have received for multiple years in a row, but this year they asked us to send a report letting them know why we should receive these funds. We are also submitting a large ask to MSDE for Promoting Positive Outcomes for Infants and Toddlers Grant which will fund Family Connects Maryland. This would be a large amount of money of 2.5 years. A second ask will go out to the Department of Health and Infant & Early Childhood Mental Health Support Services to fund the BCCCRC. We received \$5,000 from Exelon for Brian Weatherford's involvement so thanks to Brian for that!

Liz Wurster asked how those who gave early will affect us for next year. Will those groups not give us money the next year? Mary said that she thinks it will actually give us an opportunity to go back and ask them again sooner.

ISSUE #5 – Communications Update

SUMMARY OF DISCUSSION: Allie and Erik updated on communications. We have been posting more blog posts which is exciting because it was a big part of our strategic plan. We also received a number of new followers through great chefs. We are adjusting our flip the script

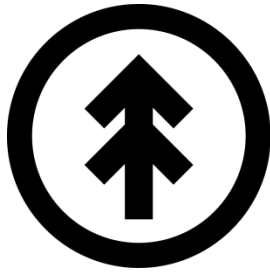
campaign to focus on this environment. We will also not be investing in print materials or online ads as we usually do, we will only promote this on social media. The media is finally starting to recognize the additional problems children are facing due to this environment, but they are not providing any solutions. We are trying to get in front of this and provide them references with our programs highlighted to remind people there are solutions.

Lindsay Jacks highlighted what is going on about the Volunteers, they are helping significantly with research for content and workshops. Lindsay is also already working on the Holiday Shop and how we are going to adjust that to meet the current environment.

ISSUE #6 – Questions

SUMMARY OF DISCUSSION: Mary spoke about the end of June and how they are working on our plan for next year. We are setting goals that we will present to you at our first meeting next year. We are still sending out appeals and having meetings. Tom Peltier thanked the staff for doing a great job and thanked Josh for his leadership on Great Chefs'. Pat spoke about the annual meeting and how we will most likely be meeting on Zoom.

The meeting adjourned at 9:12am.



The Family Tree

Development Committee Fiscal Year 2021

Chairs: Gary Marino & Tom Peltier
Staff Lead: Mary Francioli, Director of Development

Committee Members: Sally Bauer (Ex Oficio), Jeanne Aarsand, Stephanie Adler, Tom Hauser, Sean Murphy, John Meyerhoff, Sarah Kahl, Josh Slater, Brian Weatherford, Elizabeth Wurster

Development Committee Job Description:

As per Article III of the By-Laws:

- The Development Committee shall coordinate with the Development Office all advancement efforts of the Corporation. This will include the coordination of all fund-raising efforts to ensure that adequate funds are raised to support the Corporation's policies and programs.
- The committee shall plan and administer the annual Board of Directors appeal, special events, annual giving campaign and some corporate and foundation solicitations.
- In addition, the committee shall work with the Marketing Committee to enhance visibility of the Corporation, build awareness of and confidence in the Corporation among the volunteer, philanthropic, business and government communities.
- Also, the Committee shall assist with the development of policies as needed for accreditation or other best practices models.
- Provide oversight to required policy development activities, including the review of the organization's annual 990 prior to its file date.

FY 2021 Goals:

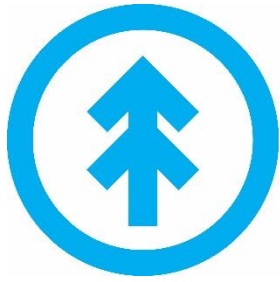
- Understand the financial needs of the agency's annual operations and Moving Families Forward strategic effort and assist in achieving fundraising goals.
- Along with other Board members, help the organization identify fund-raising prospects with the capacity and inclination to support TFT.
- Help educate Board members and familiarize them with fundraising skills and techniques to improve their comfort level in qualifying, cultivating, and soliciting prospects.
- Educate individuals and corporations on the work of The Family Tree through one-on-one meetings or larger cultivation events.
- Assist with the development of policies as needed for accreditation or best practice models.
- Develop and implement a donor cultivation strategy that allows TFT to maintain and grow its relationships with new and existing foundation partners.

Scheduled meetings:

Tuesday, September 18, 2020 8:00 AM
Tuesday, November 9, 2020 8:00 AM
Tuesday, February 9, 2021 8:00 AM
Tuesday, May 4, 2021 8:00 AM

Section 5, Article III Term of Office.

Each member of the committee shall continue in office at the pleasure of the Board of Directors



The Family Tree

ANNUAL FUNDRAISING PLAN FISCAL YEAR 2021

FY 21 Fundraising Goal - To grow sustainable, annual private fundraising by end of the fiscal year, raising a total of \$2,150,000. With the uncertainty of the pandemic recovery and its effect on charitable giving, this is a decrease of 4% from FY20's actual of \$2,232,000.

KEY OBJECTIVES

1. **Build and promote Online and Monthly Giving Program** to bring new donors to TFT through online gifts and increase giving levels by demonstrating the impact of monthly giving. Promote these ways of giving through increased promotion and marketing, resulting in additional loyal supporters to the organization.
2. **Expand Major Gift Program** by stewarding major donors and prospects who have the capacity to support the organization with gifts of \$1,000 or more.
3. **Continue to build out our Foundations Program** by seeking more opportunities to cultivate the local foundation community and new foundations while responding to funding interests and requests from different state departments and public agencies. Continue to expand our pool of prospects by researching new foundations and setting up a system for managing and tracking prospects by funder interests.
4. **Expand Special Events Portfolio** to include a broad reaching low dollar event – Lace Up to End Child Abuse 5K walk/run. The goal of this event is to involve a large cross section of supporters to gather for our child abuse prevention cause.
5. **Strengthen our donor recognition and cultivation program** by building on the momentum from last year and continue to evolve this program. Our third Evening to Give Thanks is scheduled for November 19. At that event we will also be celebrating the 30th Annual Great Chefs' Dinner by inviting and recognizing all past chairs.
6. **Enhance Board Involvement** in connecting TFT to supporters and helping us to cultivate new ones. This will be especially important during this phase of the pandemic.

CONTRIBUTIONS/ANNUAL FUND

Goal

Modify annual fund support from \$1,002,000 in FY20 to **\$875,000 in FY21** (13% decrease to account for the uncertainty of the pandemic's impact on charitable giving) from individuals family foundations and companies by strengthening the agency's Annual Fund program, cultivating and soliciting a targeted pipeline of major and planned giving prospects. Of this goal, \$221,000 has been raised through multi-year gifts.

Objective 1: To increase slightly board leadership giving from \$203,000 in FY20 to **\$205,600 in FY21** from our Board of Directors. Of this goal, \$178,000 has been raised through multi-year gifts.

- *Action Step:* Solicit new Board Members who will be asked to make a one-year pledge during their introductory year by **September 30, 2020**.
- *Action Step:* Solicit board members who did not make a three-year MFF pledge by **October 31, 2020**.
- *Action Step:* Ensure that board members who made multi-year commitments are receiving pledge reminders in a timely manner (**ongoing**).

Objective 2: To increase general Annual Fund revenue (gifts < \$1000) from \$69,000 in FY20 to **\$80,000 in FY21** (16% increase) through a focus on increasing efficiencies, promoting online giving and monthly giving.

- *Action Step:* Develop and actively market donor-centric giving options – with a focus on monthly giving, Peer-2-Peer fundraising, planned giving, paver campaign, United Way designations, and other vehicles (**ongoing**).
- *Action Step:* Increase online giving through enhancements to the web page; cultivate supporters by initiating and maintaining a “New Donor Welcome Series” and “New Subscriber Welcome Series” of emails to convert newsletter subscribers into donors (**ongoing**).
- *Action Step:* Launch a Monthly Giving Campaign to increase the number of monthly donors. Industry-wide, monthly donors have shown to be more loyal than one-time donors. We will market and promote this effort in fall and spring appeals, e-appeals, newsletters, and on the website donation page. Including a special monthly stewardship email to go out to monthly donors to keep them engaged (**ongoing**).
- *Action Step:* Enhance Peer-2-Peer giving via updates to the website that will include opportunities and forms to hold P2P fundraisers (**ongoing**).
- *Action Step:* Use personalized strategies (i.e. include recipient name in the body of the letter – not just in the address and salutation, first name only signature, personalized reply card with targeted ask amounts) for donor groups sent to printer (**Fall and Spring**).
- *Action Step:* Increase the number of general Annual Fund mail appeals from two to three, each year with stronger thematic messaging and include primer postcards in mail plan and follow with e-appeals; segmentation of LYBUNT/SYBUNT, event attendee, and new donor audiences; and the use of electronic and social media vehicles (**ongoing**).
- *Action Step:* Work with the communications specialist to develop Annual Fund stewardship vehicles to strengthen connections between TFT and its donors, including but not limited to a regular annual report, e-newsletter, email welcome series and enhanced electronic and social media communications by **December 31, 2020**.
- *Action Step:* Continue to maximize contributions received through the United Way of Central Maryland and affiliated city, state, and federal giving campaigns by

participating in virtual kick-off events and marketing the campaign designation numbers in publications **(ongoing)**.

Objective 3: To deepen the agency's commitment to its individual, corporate, and organizational major donors – the Grand Oak Circle, including board program gifts – and raise **\$590,000** (a decrease of 19% from FY20 at \$729,000) through regular personal visits, new donor acquisition, and heightened stewardship work. This decrease accounts for special one-time gifts in FY20 for emergency pandemic funding. Of this, \$43,000 has been raised from multi-year gifts.

- *Action Step:* Implement moves management plan for “top 50” list of current and past major contributors; with assigned staff and volunteers, solicitation plans, and engagement strategies, including the prioritization of personal visits **(ongoing)**.
- *Action Step:* Implement moves management of new and prospective major donors through individual and corporate peer screening and assign/implement solicitation plans **(ongoing)**.
- *Action Step:* Continue to build prospect list by data mining, personal attendance at business networking associations, and targeted research in the health care, education, and legal sectors **(ongoing)**.
- *Action Step:* Identify and implement a strong major donor cultivation and stewardship program, deepening donor connections through initiatives such as monthly facility tours, house parties, donor recognition events, and other engagement vehicles **(ongoing)**.

Objective 4: To expand TFT Legacy Society planned gifts program, providing Directors, long-time supporters, and other friends with the opportunity to provide significant support to the agency through their assets rather than their incomes.

- *Action Step:* Launch a simple but consistent marketing program for gift planning, including but not limited to promotion in newsletters, on the agency's website, and in targeted mailings by **(ongoing)**.
- *Action Step:* Interview all current planned giving donors and write up their stories to highlight in publications **(ongoing)**.
- *Action Step:* Identify a select pool of at least 20 planned giving prospects, focusing on Board members, and other long-time supporters, and approach these individuals for initial discussions by **January 31, 2021**.
- *Action Step:* Explore the possibility of meeting with estate attorneys, tax professionals, and other advocates who can help expand the agency's gift planning market by **February 15, 2021**.

FOUNDATIONS & GRANTS

Goal

Modify the recognized revenue foundation stream from \$487,000 in FY 20 to **\$425,000 in FY21** (12% decrease). Due to the pandemic, many foundations who have supported us in the past are revisiting their grantmaking and have either temporarily suspended or changed their giving priorities.

The strategy is to: 1) focus on multi-year, challenge, emergency and/or program investment grants, 2) increase the number of submittals to new foundations or to foundations who have been dormant supporters, and 3) increase the number of submittals made. Of this goal, \$45,000 has been raised in multi-year/carry over gifts.

Objective 1: To further build and refine TFT's pool of foundation prospects for immediate and future support. This will be done by conducting additional research, strengthening relationships with local foundations and grant-making associations, and conducting periodic prospect review sessions with members of the Board and/or leadership staff.

- Action Step: Continue to build on the system for maintaining and managing foundation prospects through the development and use of a comprehensive foundation development plan. This includes developing action steps for all current funders and new foundation prospects/suspects **(ongoing)**.
- Action Step: Identify new foundation and government agency prospects through a variety of research activities, including searching free and fee-based online resources, canvassing directories, and reviewing the annual reports of similar area nonprofits **(ongoing)**.

Objective 2: To develop "moves management" and cultivation plans for our funders/prospects.

- Action Step: Engage TFT's Executive Director, leadership staff and Board members in visits, phone calls, and personal communications with prospective foundations and existing foundation supporters **(ongoing)**.
- Action Step: Enter and regularly maintain all foundation relations strategies in Raiser's Edge, including but not limited to proposal tracking, action steps and reminders, and relationships with foundation staff **(ongoing)**.

Objective 3: To write and submit high-quality foundation and government grant proposals, reports, acknowledgement letters, and introductory/cultivation letters.

- Action Step: Utilize departmental staff and interns to research new or dormant foundation prospects **(ongoing)**.
- Action Step: Submit an average of 30 to 40 grants per year, including small-dollar grant applications (written by program staff) that focus on general operating support, program support, and capital or emergency needs **(ongoing)**.
- Action Step: Develop and implement creative grant acknowledgement or funder engagement cultivation ideas (e.g. "thank you videos" or "experiential meetings"), as appropriate **(ongoing)**.

SPECIAL EVENTS

Goal

To increase event support from \$742,000 in FY20, to **\$850,000 in FY21 (increase of 15%)** through TFT's special events program, including the Great Chefs' Dinner, Lace up to End Child Abuse 5K, and FamFest. Of this goal, \$296,000 has been raised through multi-year gifts.

Objective 1: To increase annual net revenue for Great Chefs from \$664,000 in FY20 to **\$800,000** (20% increase) through support for the 30th Great Chefs' Dinner, cultivating new support received at the 29th annual dinner while working to sustain increased support from consistent event donors through implementation of a moves management program to improve stewardship. Of this goal, \$274,000 has been raised through multi-year gifts.

- Action Step: Confirm honorary chairs and event chairs by **September 2020**.

- Strategize with the Board and co-chairs to identify new sponsors, send sponsor asks by **Fall 2020**.
- *Action Step:* Involve Past Chairs on the committee and host kick off in **Fall 2020**.
- *Action Step:* Expand the committee to include additional volunteers by first committee meeting in **December 2020**.
- *Action Step:* Identify potential Live Auction packages in **Fall 2020** and divide Auction committee into categories to help solicit items.
- *Action Step:* Continue to cultivate our sponsors in between events to bring them closer to the organization and our child abuse prevention work (**ongoing**).

Objective 2: To successfully launch a new low dollar event for TFT – Lace Up to End Child Abuse 5K. In our first year, we hope to net **\$40,000** through sponsorships and peer to peer fundraising.

- *Action Step:* Create event logo, sponsor documents, and one pager in **August 2020**.
- *Action Step:* Launch event web site, market peer to peer fundraising teams in **September 2020**.
- *Action Step:* Solicit sponsors, media sponsors and identify new sponsors by **September 2020**.
- *Action Step:* Plan virtual program and post event celebration in **October 2020**.

Objective 3: To raise net revenue of **\$10,000** (gross \$30K) from the FamFest (decrease of \$57K from FY19, due to support transitioned to Lace Up) through sponsorships. Of this goal, \$22,000 has been raised through multi-year gifts.

- *Action Step:* Pick a date and location for the event by **September 2020**.
- Engage Community Leaders in planning process for FamFest **by January 2021**.
- *Action Step:* Simplify registration process by using more familiar event package such as Eventbrite **March 2021**.
- *Action Step:* Identify new sponsors and in-kind donors to increase event revenue by **January 2021**.

INTERNAL CAPACITY BUILDING

Goal

To refine and support the staffing and volunteer resources necessary to advance TFT’s fund development program while strengthening the agency’s use of data to achieve fundraising success.

Objective 1: Ensure appropriate resources are being allocated to successfully implement its fundraising work.

- *Action Step:* Development Director will continue to channel a larger percentage of her time toward the major gifts portfolio of 25-50 prospects; ensure that she commits a minimum of 25% of her time to cultivating, soliciting, and stewarding this prospect pool. Goal is to have at least 6 visits a month (**ongoing**).
- *Action Step:* Regularly assess training needs and provide regular professional development opportunities to fundraising staff (**ongoing**).

Objective 2: To fully engage members of the Board of Directors in fundraising activities, providing them with the tools, knowledge and motivation to serve as partners of the development team.

- *Action Step:* Develop, refresh and support annual fundraising plans for each Board Member, identifying specific ways in which they can contribute time and talent to the fundraising effort by **September 30, 2020**.

- *Action Step:* Meet with each Board Member to review their FY21 fundraising plan, major gift prospects and other individuals and corporations assigned through the peer screenings, including setting strategies for each prospect to be implemented during the fiscal year, by **September 30, 2020**.
- *Action Step:* Provide periodic training and workshop sessions for Board Members to acclimate them to their fundraising roles, with a strong focus on assisting in the development of cultivation and solicitation strategies for leadership prospects **(ongoing)**.

Objective 3: Host TFT's 3rd Annual Evening to Give Thanks donor recognition and cultivation designed to keep donors connected to our cause and strengthen their commitment to our work.

- *Action Step:* Confirm Award recipients for FY21 by **September 2020**.
- *Action Step:* Create volunteer plan for TFT supporters to advance our work to strengthen all families by **October 20, 2020**.

Objective 4: To strengthen the Next Generation Network and achieve goals of raising awareness and funds for the organization and the network. Establish a self-sufficient membership.

- *Action Step:* Engage the Next Gen Network in Peer to Peer fundraising surrounding the Lace Up to End Child Abuse 5K in **September 2020**.
- *Action Step:* After they learn the power of Peer to Peer fundraising and strategies to use, develop a campaign to replace the Oktoberfest revenue in **October 2020**.
- *Action Step:* Engage the Next Gen Network in brainstorming ways to replace the Jingle and Mingle Happy hour. Staff tables at community stops or bars and restaurants doing take out for collection of toys. **December 2020**
- *Action Step:* Host a spring event either Strike out or an Oktoberfest-like event if CDC guidelines allow in **April/May 2020**.
- *Action Step:* Friend-raise for The Family Tree through our events as well as gaining new members **(ongoing)**.
- *Action Step:* Implement recruiting happy hours, (when allowed). These will take place at local Baltimore bars where we can tell people about what Next Gen Network does and how they can be involved. This will not only help us gain more members, but it will help spread awareness about Next Gen and TFT.

Objective 5: To strengthen the agency's use of data to achieve fundraising success while ensuring that the development database is populated with accurate and integrated contact information.

- *Action Step:* Continue improving the donation page on the website, add multiple "call outs" to other areas to help drive traffic to that page. Promote monthly giving on the donation page. Add quotes throughout the website from monthly donors about why they donate each month. (ongoing)
- *Action Step:* Continue to improve the way we pull data out of Raiser's Edge for mailings. Keep better records of how we are doing this so in the future we can stay consistent.
- *Action Step:* Improve record keeping when we meet with an organization/constituent. Enter this in RE so we can all be on the same page about each constituent.
- *Action Step:* Adjust the way we enter gifts in order to make queries and exports easier.
- *Action Step:* Connect Raiser's Edge to HubSpot and implement the use of the new CRM to improve cultivation of donors.

Objective 6: Build our email list in order to keep our supporters and friends engaged in our work.

- **Action Step:** Work with staff in all departments to gather email addresses for contacts and partners by **September 2020**.
- **Action Step:** Make capturing emails prominent in mailings and on our web site. Create strategies for building a broader network **(ongoing)**

Objective 7: Establish a set of evaluative tools and metrics to measure the impact of its fundraising activity. This will be achieved with standard reports, queries, and exports in Raiser's Edge that can be shared with fundraising staff, the Development Committee, and the Board of Directors. These metrics may include, but should not be limited to, the following:

- Total dollars raised
- Number of foundation, corporate, and individual giving prospects
- Total number of grant and gift proposals submitted
- Average grant and gift amount
- Grant and gift proposal success rate
- Total number of letters of inquiry and concept papers
- Number of personal visits
- Number of new donors
- Number of Online Gifts
- Total number of planned giving donors
- Number of Grand Oak Society donors
- Number of new Grand Oak Society donors
- Donor retention rate
- Direct mail and online campaign success rates
- Board giving numbers

A young man with short dark hair, wearing a blue patterned shirt, is sitting on a grey couch and smiling broadly. He has his right arm around the shoulder of an elderly man with white hair and a beard, wearing glasses and a blue shirt. The elderly man is also smiling and looking towards the young man. To the left, an elderly woman with short white hair, wearing a light blue sweater, is also smiling and looking towards the young man. She is holding a white mug. The young man is holding a tablet computer in his left hand. The background is a blurred indoor setting, possibly a living room, with warm lighting.

If you are age **70½ OR OLDER, OR KNOW SOMEONE WHO IS**, you can **LOWER YOUR TAXES** by making an IRA gift to charity.





**The
Family
Tree**

Raising families up.

2108 North Charles Street
Baltimore, MD 21218

There's still time to make an IRA rollover gift!

If you are age **70½ or older and have an IRA, or you know someone who is**, each year you have to make the required minimum distributions. You can lower your taxes by making a rollover gift to charity. This is because direct transfers from your traditional IRA to charity can usually be excluded from your taxable income.

It's easy to do. Just contact your IRA custodian and ask that [an amount of your choosing] be transferred to The Family Tree. You will be helping to prevent child abuse and neglect while saving on taxes: what could be better?

GO TO → familytreemd.org/ira



The Family Tree is hosting the inaugural Brent A. Rosenberg Lace Up to End Child Abuse 5K on Saturday, October 24th and Sunday, November 1. This year will be a virtual event, but in future years we look forward to a live run/walk.

We recognize these are challenging times for all of us, but the families we serve are struggling now more than ever. Research demonstrates that due to social isolation, the economic downturn, a sharp rise in unemployment, and high stress, our communities are experiencing an increased risk of child abuse and neglect.

All proceeds from this race will support our child abuse prevention services and programs. Though our offices remain closed, our work continues, as we transitioned our programs to online platforms providing parenting classes, home tele-visits, workshops, professional training, one-on-one tele-counseling, and more. Plus, our 24-hour Parenting HelpLine and online chat continue to provide help and vital information to parents in need.

This is also a time that we can gather our closest friends and safely run/walk in support of Maryland's families. Lace up your tennis shoes, choose your course, and cross the finish line in support of families and children.

LOGISTICS

- Run or walk anytime on Saturday, October 31st and Sunday, November 1, 2020.
- Location: You choose the route
- Distance: 5K Run or 1 Mile Walk

GET INVOLVED!

- Sponsor the event
- Create a team
- Share your results on social media
- Tell your friends and family to donate!



familytreemd.org/laceup



Sprint Sponsor \$5,000

This sponsorship provides free 24-hour Parenting HelpLine support to 150 families in crisis.

- Logo and link featured on The Family Tree website & event registration website
- Recognition during Virtual Opening Ceremony
- Logo on Run/Walk T-shirts
- Recognized in social media, e-blasts, promotional flyers, and press releases
- Opportunity to provide promotional item in Thank You Packet for participants
- Recognition in The Family Tree's FY 2021 Annual Report

Jog Sponsor \$2,000

This sponsorship provides 6 months of weekly support groups to families at-risk for child abuse.

- Logo and link featured on The Family Tree website and event registration website
- Logo on Run/Walk T-shirts
- Recognized in social media, e-blasts, promotional flyers, and press releases
- Opportunity to provide promotional item in Thank You Packet for participants
- Recognition in The Family Tree's FY 2021 Annual Report

Walk Sponsor \$500

This sponsorship provides 5 classes to a new parent in need of support and education.

- Recognition on The Family Tree website & Registration website
- Name on Walk T-shirts
- Recognized in social media, e-blasts, and promotional flyers
- Recognition in The Family Tree's FY 2021 Annual Report





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Lace Up to End Child Abuse 5K Sponsor List

#	Sponsors	Amount
1	The Henry and Ruth Blaustein Rosenberg Foun	\$15,000
1	McCormick & Company, Inc.	\$2,500
1	Fundamental	\$2,000
1	H.G. Roebuck & Sons	\$1,500
1	CGA Capital/W. Kyle Gore	\$1,000
	TOTAL RAISED Gross	\$22,000
		\$0
	TOTAL	\$22,000



The Family Tree

**30th Annual Great Chefs' Dinner
April 26, 2020 featuring Chef Linwood Dame**



Growing up, Linwood Dame never lived in the same place for more than five years, so it is with some surprise and delight that he has found himself in Baltimore for 34 years. He arrived in the city in 1987, with his wife Ellen, to explore the idea of opening his own restaurant, and the dream materialized in 1988 when Linwoods officially opened its doors. This decade was a turning point in American cuisine, and there was an explosion in creativity with an emphasis on regional cooking, fresh ingredients, and new techniques based on classic skills. Linwood was ready to bring this to the area, and showcase it all behind an open kitchen, one of the first of its kind in Baltimore.

Linwood inherited his love of food from his Southern mother, who is a wonderful cook, and learned her skills in Norlina, North Carolina. Linwood joined the Coast Guard in 1976, and hoped to enter the Culinary Institute of America, when he completed his four year commitment. In order for him to qualify for admission, he had to have a year's experience in the kitchen, so he convinced the captain of his ship to allow him to transfer from search and rescue duties to the galley where he flourished.

Linwood entered the Culinary Institute in 1980 and graduated in 1982. He then became executive chef and partner at the Butlery, a country french restaurant in Richmond, Virginia. There he was involved in the opening of two additional restaurants and a catering business.

When an opportunity arose, Linwood and Ellen returned to Baltimore, and began the search for a location for the new venture. Linwoods has grown to include a catering division, for events both at Linwoods, and at many venues in the area. Linwoods is always included in Baltimore Magazine's Best Restaurants issue, and the restaurant has become a special place for the community.

Linwood is very connected to his new home town, and supports many of the non-profit organizations and their events, that are so very important to the future of our city.



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30th Annual Great Chefs' Dinner Sponsor Totals	
Sponsors	Amount
Aarsand, Jeanne & Kurt	\$15,000
Bauer, Sally & Woods, Sarah	\$2,500
Brinkley, Doug & Ellen	\$7,500
DeCosta, Eric & Lacie	\$2,500
Gore, Paula & Kyle/CGA Capital	\$15,000
Graul, Dennis/Graul's Market	\$5,000
Hayes, Charlene & Floyd	\$2,500
Kirk Family Foundation	\$50,000
Macks, Larry & Ellen	\$7,500
McDonald, Tom & Jamie	\$2,500
McIntyre, Hunter	\$2,500
Meyerhoff, John and Lenel	\$25,000
Murphy, Sean/T-Rex Solutions, LLC	\$7,500
Nachbahr, Erik	\$10,000
Peltier, Laurel & Tom	\$5,000
Roebuck, Charles and Lee	\$2,500
Shaw, Susan and Steve	\$5,000
Sherman, Betsy & George	\$100,000
Waesche, Xandy & Roger	\$2,500
Abbot Downing	\$2,500
Cowie, B.J. & Bill	\$50,000
TOTAL	\$322,500



The Family Tree

Raising families up.

FY21 Communications Update

Important Metrics to Note:

- Audience is continuing to grow
 - Facebook – 2,309, 74% to goal of increasing by 25%
 - Instagram – 701, 22% to goal of increasing by 25%
 - Twitter – 1,357, 0% to goal of increasing by 25%
 - LinkedIn – 402, 1% to goal of increasing by 25%
- Number of “impressions” (people who saw our posts in the last 30 days):
 - Facebook: 12,759
 - Instagram: 2,377
 - LinkedIn: 638

Blog Updates:

Check out our blog: www.familytreemd.org/blog

- Published 13 Blogs from May 18 – September 3
 - 5/18: Coping with Stress as a Parent – 398 people reached
 - 5/27: Understanding Children’s Emotional Wellbeing – 238 people reached
 - 6/5: Our Family is Mourning – 408 people reached
 - 6/8: Single Parenting in an Unprecedented Time – 363 people reached
 - 6/18: Communicating with Teens - 144 people reached
 - 6/26: How to get Children Comfortable wearing masks – 386 people reached
 - 7/7: Talking to Your Kids About Race – 419 people reached
 - 7/16: Getting Young Children to Nap – 167 people reached
 - 7/23: Cyberbullying – 177 people reached
 - 7/31: When you teen is hanging out with the wrong crowd – 290 people reached
 - 8/13: Together, we can prevent child abuse – 229 people reached
 - 8/20: Talking to your kids about sex – 144 people reached
 - 8/31: Back to school – 124 people reached

Friday Parenting Break:

- 7/17: Lindsay Jacks, 958 people reached
- 7/24: STEMcx,
- 7/31: Odeja Hall – OneLove, 484 reached
- 8/7: Irvine Nature Center, 1,056 people reached
- 8/14: Dani Emerson, TFT mental health, 436 people reached
- 8/21: Wendy Lee, Baltimore Visitation Center, 557 people reached
- 8/28: Monica Boddie, Transformation Health, 656 people reached