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# Fund Development Plan

FY 2020-2021

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Board Approved: XXXXX

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# About The GLOBE Academy

## Purpose of GLOBE's Fund Development Plan

With the participation of The GLOBE Academy's Board of Directors, Executive Director administration staff, faculty and volunteers, the following plan serves as a guide for development initiatives through June 30, 2021. It is intended that this plan is assessed, revised, and updated on an annual basis. This plan supports GLOBE's Strategic Plan and Charter, and as changes are made to those documents, this Fund Development Plan will also be updated to reflect those revisions.

## Vision

To develop globally minded citizens who have the knowledge, skills, and attitudes to effect positive change in our world.

## Mission

The GLOBE Academy fosters Global Learning Opportunities through Balanced Education for children of all backgrounds. With a focus on dual-language immersion, an experiential-learning model and a constructivist approach, GLOBE inspires students to be high-performing lifelong learners equipped to make a positive impact in the world.

## Core Values

The GLOBE Academy's core values are expressed in the acronym, **CREST: Community, Respect, Empathy, Sustainability and Trust**. These values are expected of the governing board, faculty, staff, parents, and students. They are woven into daily life at GLOBE and incorporated into the curriculum.

## Unique Value Proposition

Studies show that two-way language learning gives children a variety of economic, cultural, cognitive, and psychosocial advantages. Students of the Dual Language Immersion Model: (1) achieve higher proficiency in the second language than traditional foreign language instruction; (2) perform as well as or better than English-only students on standardized tests in English; and (3) are more aware of and generally show more positive attitudes towards other cultures.

## Multi-Year Fund Development Goals

1. Maintain a strong fundraising program through targeted cultivation and stewardship of donors, active recruitment and retention of volunteers, and better use of the Board committees and Parent Teacher Community Council (PTCC).
2. Embrace and celebrate philanthropy at GLOBE by educating all constituents about ways to give and the importance of annual giving and the school's fundraisers.
3. Explore creative, alternative methods to increase revenue in the era of COVID-19.

**Overall Fund Development Goal FY 20-21:****\$300,000****Components of the Fund Development Plan**

<b>1. Annual Fund</b>		<b>\$158,500</b>
Major Gifts/Individuals	\$26,000	
Board Giving	\$3,000	
One-time Donations	\$50,000	
Recurring Donations	\$45,000	
Corporate Giving/Sponsorships	\$20,000	
General Operating Support Grants	\$8,500	
Miscellaneous Donations/Income	\$6,000	
<b>2. School-led Fundraising Events</b>		<b>\$141,500</b>
GLOBE Trot Fun Run Event	\$130,000	
Square 1 Art	\$4,000	
GLOBE Rocks Charity Concert	\$6,500	

**Fundraising Expenses**

<b>Expense</b>	<b>Amount</b>	<b>Notes</b>
Services	\$2,000	Donor software/database management monthly subscription
Design	\$8,000	One-time fee to develop donor database
Printing	\$1,000	Donor solicitation/recognition letters, recognition banners, sponsorship packets
Postage	\$200	For donor and prospect relations
GLOBE Trot	\$6,900	Dojiggy annual subscription, raffle prizes, donor incentives, marketing materials, supplies, postage
GLOBE Rocks	\$4,000	Band, t-shirts, marketing materials, supplies, postage
<b>TOTAL:</b>	<b>\$22,100*</b>	

*\*Due to COVID-19 restrictions on in-person events, expenses related to fundraising events, such as food, security, and photo booths, etc., have not been included in these expense estimates since they will be virtual.*

# FY 2020-2021

## Fund Development Plan Components

**Annual Fund:**

**\$158,500**

**MAJOR GIFTS/INDIVIDUALS:** *Major gifts are defined as donations totaling \$1,000 or more during the school year.*

**Goal:** Cultivate a minimum of 26 major donors to give to the Annual Fund throughout the year.

**Revenue Target:** \$26,000

**Projected Expenses:** \$100 (printing and postage costs)

**Timing:** Solicitations in August, December, April & June

### **Methods/Activities:**

1. Research and implement cultivation methods that offer an opportunity to thank major donors for their commitment to the Annual Fund as well as to help them see the bigger picture of how the Annual Fund helps to meet GLOBE's operating budget goals and further the school's mission.
2. Ensure the Executive Director and/or Board Chair signs donor acknowledgements and thank you letters and calls to personally thank and check-in with major donors at least three times a year.
3. Continue to identify potential grandparents, extended family, or other community donors with the capacity to give a major gift.
4. Provide a donation acknowledgement immediately upon receipt of the donation (including donations not given online). Send donor thank you letters at the end of GLOBE's fiscal year (June 30) to thank donors for their total contribution(s) over the year.

### **Key Performance Indicators:**

- Achieve budgeted goal of \$26,000
- Cultivate/steward a minimum of 25 major donors
- Conduct a minimum of three donor touchpoints throughout the year
- Track new major donors
- Track year-to-year change in giving by current major donors

**Accountability Assignments:** Development Committee Chair, Development Committee, Board Chair, Executive Director, and CFO

**BOARD OF DIRECTORS GIVING:** *Board gifts are defined as donations from current Board of Directors members.*

**Goal: Steward the Board of Directors to ensure 100% participation to the Annual Fund during the school year.**

**Revenue Target:** \$3,000

**Projected Expenses:** \$0 (none anticipated)

**Timing:** Solicitations in August, November, February & May

**Methods/Activities:**

1. Set the annual giving expectations/goals with the Board of Directors at the beginning of the school year.
2. Send out quarterly targeted appeals reminding Board members of the goals and progress throughout the school year.
3. Follow-up with targeted solicitations to Board members who have not given to the fund to reach 100% participation goal.
4. Work with the Board to identify donor/sponsor prospects and/or matching gift opportunities throughout the year.
5. Ensure the Executive Director and/or Board Chair signs donor acknowledgement and thank you letters and calls to personally thank board members for their donations.
6. Provide a donation acknowledgement immediately upon receipt of the donation (including donations not given online). Send donor thank you letters at the end of the GLOBE's fiscal year (June 30) to thank donors for their total contribution(s) over the year.

**Key Performance Indicators:**

- Achieve budgeted goal of \$3,000
- Achieve 100% participation from the Board of Directors (any amount)
- Conduct a minimum of four donor touchpoints throughout the year
- Track year-to-year change in giving by current Board members

**Accountability Assignments:** Development Committee Chair, Board Chair, and Executive Director

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**ONE-TIME DONATIONS:** *One-time donations are defined as a single gift received from a donor either online, via mail, or given in-person during the school year.*

**Goal: Become more proactive in Annual Fund donor solicitations to increase participation and gift amounts with current families and GLOBE staff members.**

**Revenue Target:** \$50,000

**Projected Expenses:** \$300 (printing, postage and donor recognition banners)

**Timing:** Solicitations in July to October, January & April to June

**Methods/Activities:**

1. For the 2020-2021 school year, revise the Annual Fund Donor Recognition Levels to include donors who give \$100 or more.
2. Develop two new donor circles that recognize major donors who give two or more consecutive years and sustaining donors who give any amount for three or more consecutive years to encourage yearly giving to the fund.
3. Encourage company match opportunities to increase giving to the fund over the entire school year.
4. Send out targeted appeals reminding families of the goals and progress throughout the school year. Reiterate the goal to achieve 100% participation by all families (any amount).
5. Send out targeted appeals to teachers and staff with a goal of achieving 100% participation.
6. Implement new donor benefits to motivate and recognize donors throughout the year.

**Key Performance Indicators:**

- Achieve budgeted goal of \$50,000
- Achieve 100% family participation (any amount)
- Achieve 100% teachers/staff participation (any amount)
- Conduct a minimum of eight donor touchpoints throughout the year
- Track the number of online gifts
- Track the number of increased gifts
- Track the year-to-year change in giving by families and staff

**Accountability Assignments:** Development Committee Chair, Development Committee, Board of Directors, Board Chair, Executive Director, and CFO

**RECURRING DONATIONS:** *Recurring donations are defined as multiple gifts received on a defined schedule from a donor either online, via mail, or given in-person during the school year.*

**Goal: Steward current recurring donors and actively seek new recurring donors to increase participation and gift amounts with GLOBE families and staff members.**

**Revenue Target:** \$45,000

**Projected Expenses:** \$300 (printing, postage and donor recognition banners)

**Timing:** July - October

**Methods/Activities:**

1. For the 2020-2021 school year, revise the Annual Fund Donor Recognition Levels to include donors who give \$100 or more.
2. Develop two new donor circles that recognize major donors who give two or more consecutive years and sustaining donors who give any amount for three or more consecutive years to encourage yearly giving to the fund.
3. Encourage monthly giving and company match opportunities to increase giving to the fund over the entire school year. Follow-up with recurring donors who have inactive credit cards linked to their monthly payments.
4. Send out a minimum of four targeted appeals reminding families and board members of the goals and progress throughout the school year.
5. Follow-up with targeted appeals to families, Board members and staff who have not given to the fund to reach 100% participation goal.
6. Implement all the new donor benefits to motivate and recognize donors throughout the year.

**Key Performance Indicators:**

- Achieve budgeted goal of \$45,000
- Achieve 100% family participation (any amount)
- Achieve 100% staff participation (any amount)
- Conduct a minimum of four donor touchpoints throughout the year
- Track the number of online gifts
- Track the number of increased gifts
- Track the year-to-year change in giving by families and staff

**Accountability Assignments:** Development Committee Chair, Development Committee, Board of Directors, Board Chair, Executive Director, and CFO

**CORPORATE GIVING/SPONSORSHIPS:** *Corporate giving is defined as donations received from businesses/organizations through one-time, recurring, or matching gift donations or sponsorships. Sponsorships are gifts made by an individual, business, or organization to further GLOBE's mission and are generally recognized by GLOBE with an acknowledgment that the sponsor has supported the school's Annual Fund by displaying the sponsor's logo and/or name and providing applicable sponsor benefits.*

**Goal: Cultivate a minimum of 12 sponsors and/or corporate match partners to give to the Annual Fund throughout the year.**

**Revenue Target:** \$20,000

**Projected Expenses:** \$500 (printing and postage costs)

**Timing:** Solicitations in July-December

**Methods/Activities:**

1. Develop sponsorship packet and prospect list to solicit local businesses and organizations who are aligned with GLOBE's mission.
2. For the 2020-2021 school year, revise the Annual Fund Donor Recognition Levels to be more attractive to potential sponsors.
3. Send out a minimum of four targeted appeals reminding families, Board members and staff about the potential for matching donations with their companies/ organizations.
4. Ensure the Executive Director and/or Board Chair are signing sponsorship acknowledgement and thank you letters and calling to personally thank and check-in with sponsors at least three times a year.
5. Provide a donation acknowledgement immediately upon receipt of the donation (including donations not given online). Send donor thank you letters at the end of the GLOBE's fiscal year (June 30) to thank donors for their total contribution(s) over the year.

**Key Performance Indicators:**

- Achieve budgeted goal of \$20,000
- Cultivate/steward a minimum of 12 sponsors/corporate partners
- Conduct a minimum of three sponsor/partner touch points throughout the year
- Track new sponsors and corporate match businesses/organizations
- Track year-to-year change in giving by current corporate/organizational funders/sponsors

**Accountability Assignments:** Development Committee Chair, Development Committee, Board of Directors, Board Chair, Executive Director, and CFO

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**GENERAL OPERATING SUPPORT GRANTS:** *General operating support grants are defined as an unrestricted sum of money given to the GLOBE Academy to specifically support the Annual Fund. Grants for restricted projects are not counted as part of this goal.*

**Goal: Research, write, and submit a minimum of five grant proposals requesting support for the Annual Fund.**

**Revenue Target:** \$8,500

**Projected Expenses:** \$0 (none anticipated)

**Timing:** Solicitations primarily from July - March

**Methods/Activities:**

1. Develop a grant calendar and prospect list of grant funders that supports GLOBE's Annual Fund.
2. Draft grant proposals requesting unrestricted support for the school.
3. Provide a donation acknowledgement and thank you letter immediately upon receipt of the donation.
4. Manage grant awards by maintaining a grant management calendar and process to ensure all funders are receiving updates and grant reports in a timely manner.

**Key Performance Indicators:**

- Achieve budgeted goal of \$8,500
- Submit a minimum of five general operating support grant proposals
- Create an annual grant calendar for the school
- Track new grant funders
- Ensure grant funders receive grant reports on time

**Accountability Assignments:** Development Committee Chair, Development Committee, Director of Communications

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**THIRD PARTY FUNDRAISING/MISCELLANEOUS UNRESTRICTED DONATIONS:** *Third party fundraising and miscellaneous donations are defined as unrestricted donations that do not fall into any of the previous categories listed above. They also are typically unsolicited and can be recurring and expected each year.*

**Goal: Ensure that all unrestricted miscellaneous donations are categorized correctly.**

**Revenue Target:** \$6,000

**Projected Expenses:** \$0 (none anticipated)

**Timing:** Year-round

**Methods/Activities:**

1. Work with the CFO to get monthly reports on miscellaneous donations to ensure they are categorized correctly.
2. Review supporters giving miscellaneous donations and see if they can be considered to solicit as a sponsor or major donor.

**Key Performance Indicators:**

- Achieve budgeted goal of \$6,000
- Track and review all miscellaneous donations

**Accountability Assignments:** Development Committee Chair and CFO

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## School-led Fundraising Events:

**\$141,500**

GLOBE volunteers, Board members, and staff spend a significant amount of time planning and executing fundraising events throughout the school year to further GLOBE's mission and raise funds for specific departments. Three annual school-led fundraising events, GLOBE Trot, Square 1 Art, and GLOBE Rocks, traditionally bring in significant revenue for The GLOBE Academy. GLOBE Trot raises unrestricted funds for the school that are separate from the Annual Fund goal and include fun and motivating incentives for donors. Square 1 Art proceeds directly benefit the art department and GLOBE Rocks proceeds directly benefit the music department. Restrictions due to the COVID-19 pandemic are forcing the school to adjust the traditional in-person fundraising event structures to be held virtually this school year. There will be improved communication about how these events are separate from the Annual Fund and how they benefit GLOBE. Each event will have a planning committee made up of volunteers, board members, and staff to increase outreach to potential participants and maximize revenue. Each fundraising event planning committee will develop its own goals and evaluation plan.

### Overall Fundraising Event Goals:

- To highlight the students, staff, and programs throughout GLOBE to gain financial and volunteer support for GLOBE.
- To plan events purposefully to ensure good attendance and success, highlight the accomplishments of GLOBE, and effectively use the Board of Directors, Executive Director, and Development Committee time and efforts.
- To celebrate philanthropy, donors, and the impact of successful fundraising on GLOBE.

**EVENT 1: GLOBE TROT FUN RUN:** Typically, GLOBE students run, walk, skip, race, and exercise their way around the track while parents and supporters line the course to cheer them on. This year will look different in that the event will be 100% virtual but will still have an exercise theme with prizes and goodies for students, families and staff who help to raise funds during the event. There has been some concern in the past over the way students were recognized for raising funds and some parents voiced they felt it singled out the students who were unable to raise as much as their classmates. The planning committee will review these concerns and see how to restructure the donor recognition this year to be more inclusive of the entire GLOBE community. *Please note that GLOBE Trot donations come with fun incentives for the students and they do count towards the school's overall \$300,000 unrestricted fundraising goal. However, GLOBE Trot donations do not count towards a family's Annual Fund donation and donor recognition/benefits.*

**Revenue Target:** \$130,000

**Projected Expenses:** \$6,900

**Timing:** Solicitations primarily in October/November

**EVENT 2: SQUARE 1 ART:** Square 1 Art is an annual fundraiser for the art department, and it puts 100% of the proceeds into the hands of GLOBE’s young artists. GLOBE’s partner, Square 1 Art focuses on the accomplishments of the student, creates conversations between parent and child, as well as memorable keepsakes family members cannot resist. When all is said and done, the child’s creativity is affirmed, the parents have a lasting memory, and the GLOBE raises valuable funds for our art classes. While this fundraiser portion of this event is typically held exclusively online in the past, the art teachers at GLOBE created the art projects while students were in class in the months prior to the event. This will be more difficult this year since students are starting school with virtual learning only. The Development Committee is working with the planning committee to see how we can streamline the process to maximize success and convenience for families during these unusual times.

**Revenue Target:** \$4,000  
**Projected Expenses:** \$0  
**Timing:** Solicitations primarily in November/December

**EVENT 3: GLOBE ROCKS BENEFIT CONCERT:** Typically, GLOBE Rocks is a 21+ benefit concert for the music department at The GLOBE Academy and it puts 100% of the proceeds into the hands of our young musicians. This fun concert features awesome raffle prizes, a free photo booth to enjoy with friends, a cash bar throughout the night, and a chance to make new friends and listen to amazing music, all rolled into one unforgettable night. Due to the pandemic, this event will be virtual this school year and the planning committee is considering a live streaming event, drive-in option, and other online or socially distanced opportunities to raise funds during this event. While the event raised more than this year’s goal in the year prior, the Development Committee is expecting to raise less money this year due to the changed event format due to COVID-19.

**Revenue Target:** \$6,500  
**Projected Expenses:** \$4,000  
**Timing:** Solicitations primarily in January

## **Fund Development Goals with No Fiscal Objectives:**

**Goal 1: Increase volunteer involvement in GLOBE’s fundraising activities.**

**Strategies:**

1. Assure that volunteer training is effective, well-conceived, and uses volunteers’ time wisely.
2. Keep volunteers and solicitors “in the know” with financial updates and status reports during

monthly Development Committee meetings.

3. Take the time to attend and participate in school-wide events, such as Open House and orientation, to talk about the Annual Fund, its significance and importance to GLOBE, and how parents can get involved.
4. Look at ways to work together with the PTCC to meet the ultimate goal of providing the necessary resources for GLOBE and its students, staff, and families.
5. Define the roles of the Development Committee and present them to the PTCC to recruit volunteers.

**Goal 2: Improve prospect research and donor stewardship by switching to a more efficient, cost effective, and comprehensive donor database and fundraising platform.**

### **Strategies**

1. Maintain a clean, updated database containing all available constituent information for accurate and timely reports, receipts, and to execute the acknowledgement and recognition process.
2. Ensure all database changes are directed to the Development Committee Chair or CFO for consistency and to maintain the database integrity.
3. Create and distribute standard monthly fundraising reports to the Development Committee, Board of Directors, Executive Director, and PTCC as needed.
4. Develop a process for successful gift reporting of and crediting to foundations and the donors connected to the school's charitable giving vehicles.
5. Ensure there are no fundraising-associated red flags in GLOBE's annual audit.
6. Maintain good relations with the CFO and Business Office.
7. Review the database protocol and areas of improvement on a quarterly basis.
8. Create a protocol sheet for all involved in the database process.
9. Advise the Board Chair and Executive Director when a major gift is received and have them send the donor a personal note or conduct a personal phone call to thank them.
10. Continue database cleanup as time allows.

**Goal 3: To recognize, acknowledge, and thank those who give GLOBE their time, in-kind and/or financial resources.**

## Strategies

1. Develop an acknowledgement plan, specifically designed to more personally thank current family donors who give \$1,000 or more to the Annual Fund.
2. Acknowledge and thank volunteers, especially those who have continually given throughout the year, including Development Committee members and volunteers from other Board committees.
3. Work with the Communications Director to write quarterly donor spotlights and/or donor articles.
4. Send occasional VIP letters from the Executive Director to all donors in the leadership circles to encourage their ongoing participation.
5. Continually review and discuss the program, evaluate new ideas, and best practices.
6. Discuss fundraising goals and achievements in staff meetings, board meetings, and during monthly Development Committee meetings.

## Communications Strategies

1. **Website:** The website is updated monthly, ensuring current information is always available. Updates include new donor recognition and links to appropriate locations to encourage online giving and fundraiser participation.
2. **Weekly Updates:** The Development Committee provides weekly fundraising updates highlighting accomplishments and upcoming activities. Donors are highlighted on a quarterly basis. The content in the newsletter links back to the website and fundraising platform.
3. **Public presentations:** Both the Executive Director and members of the Board of Directors increase the number of presentations about GLOBE to target key communities to solicit donations, partnerships, and/or sponsorships.
4. **Major Donor Communications:** All major donors (those who give \$1,000 or more per year) are asked their communications preferences (email updates, phone calls, personal meetings). Staff provide timely information to all major donors according to their preferences. Regardless of other communications methods, the Executive Director or Board Chair calls each major donor to check in at least three times a year.

It is imperative that the entire GLOBE community becomes advocates and raises funds for GLOBE. It is the job of every board and staff member to be involved in the fundraising process. This Development Plan was created in support the goals of the GLOBE Academy's Strategic Plan that is available on GLOBE's website (<https://theglobeacademy.org/Board-Of-Directors>) under the Board of Directors section that leads to the full document stored on Board on Track.