

Development Report – March 2021

Submitted by Shari Thomas, Director of Development

At the December 2020 meeting, we discussed the goal of putting systems in place to build a major gift program. I described the initial steps that would be taken - targeting a new pool of high net-worth individuals and laying out a pathway to grant funding opportunities. So far, we have been able to do the following:

- Purchased a new wealth screening tool for donor acquisition and cultivation planning.
- Christian Nunes received her first portfolio of high-net worth individual prospects; we are cultivating those relationships with event invitations and other forms of outreach.
- 1-2 strategic fundraising initiatives are being formulated to bolster eligibility for grant funding.
- 300 new prospects with 5, 6, and 7 figure giving capacities were identified and engagement plans are being developed.

Also, stemming from December 2020's report, there is still outlook for laying out an enhanced plan for planned-giving and diversifying the grassroots and annual donor pool.