Strategies to broaden awareness and engage support for Ronald McDonald House of Durham & Wake

Approved by Resource Development Committee on [INSERT DATE]
Approved by the RMHD Board of Trustees on [INSERT DATE]

Keeping Families Close

www.RMHDurhamWake.org
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2017 Resource Development Plan

1. Purpose + Structure of the Plan

Plain and simple, our goal is to secure the community involvement and financial support needed to operate the Ronald McDonald House of Durham & Wake and its programs both now and in the future.

This document serves as a blueprint of the vision for how we will meet the goals set forth in the 2017 Operational Plan.

2. Volunteer + Staff Leadership

Board of Trustees – Laura Gorry, President

The purpose of the Board of Trustees is to support the Ronald McDonald House, its operations, staff and ongoing activities. The Board is responsible for the overall financial well-being of RMH through fiscal oversight, as well as through support of fund-raising efforts. The Board is also responsible for maintaining relationships with key partners, including Duke University, Duke University Health System, WakeMed Hospital, RMH charities, and the community at large.

Advisory Council – Ric Richards, Chair

Advisory Council Members work with the Board of Trustees to provide leadership, assist with fundraising, and add expertise as needed by RMH.

Resource Development Committee – Diane McIntee, Chair

The role of the Resource Development Committee is to assist in the construction of fund-raising policies and plans that support the vision and goals of RMH. The Committee recommends the annual fund-raising plan to the Board for approval and works to educate and engage the full board, as well as other volunteers, in fundraising. Members provide direct support, helping implement fund-raising strategies including: special events, major gifts (individual, corporate, foundation, etc.), direct mail and planned giving.

Heart of Gold Gala Committee

The Heart of Gold Gala Committee, made up of subcommittee chairs, meets seasonally to implement the event plan and support the success of the annual Hearts of Gold Gala. Subcommittees support key functions of the event, including registration, silent auction, Wall of Wine and decorations, event preparation and night-of activities.
External Relations Staff

Oie Osterkamp, Executive Director
Nancy Arne Jones, CFRE – Senior Director, Development & Communications
Mitzi Viola – Director of Development
Traci Cortez – Director of Special Events
Patricia Hume – Development & Accounting Manager
Clay Ragan – Volunteer Services Manager
Teresa Tate – Development & Accounting Coordinator
3. 2016 Giving Results

Campaign Comparison
The RMH fundraising program has experienced significant growth since we expanded the Durham House in 2012 and added a House program at WakeMed in 2016. Growth has occurred across the board:

- **Unrestricted gifts** have increased by nearly 67% in four years, to meet the organization’s growing operational needs. This average growth of 14.4% is significantly higher than industry averages.
- **Capital campaign** pledge payments are still coming in. Staff are also soliciting new capital sponsorships for rooms in the original House to offset uncollectible pledges.
- In 2015, we defined and launched new opportunities for donors to establish **endowments**. In the two years since the endowment policies were established, we have increased our total endowments by $150,000 and funding has begun on three new named endowments:
  - Wells McRae Cain Room Endowment
  - Norman & Bettina Roberts Suite Endowment
  - Mark & Vicki Laport Endowment

<table>
<thead>
<tr>
<th>Campaign</th>
<th>2012</th>
<th>% +/-</th>
<th>2013</th>
<th>% +/-</th>
<th>2014</th>
<th>% +/-</th>
<th>2015</th>
<th>% +/-</th>
<th>2016</th>
<th>4-year growth</th>
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<tbody>
<tr>
<td>Unrestricted</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Annual, Operating</td>
<td>$1,041,618</td>
<td>35.3%</td>
<td>$1,409,141</td>
<td>1.6%</td>
<td>$1,431,042</td>
<td>13.0%</td>
<td>$1,617,446</td>
<td>7.4%</td>
<td>$1,737,200</td>
<td>66.8%</td>
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<td>Temporarily Restricted</td>
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<td></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WakeMed</td>
<td>$150,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>Endowment - Quasi</td>
<td>$49,553</td>
<td></td>
<td>$10,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Permanently Restricted</td>
<td></td>
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<td></td>
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<td></td>
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<td>Capital</td>
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<td>$559,413</td>
<td></td>
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<td>$95,855</td>
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<td>$78,128</td>
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<td>Endowment - True</td>
<td>$5,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$20,000</td>
<td></td>
<td>$70,000</td>
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<tr>
<td>TOTAL</td>
<td>$4,079,969</td>
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<td>$1,973,554</td>
<td></td>
<td>$1,742,128</td>
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<td>$1,932,854</td>
<td></td>
<td>$1,895,328</td>
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</table>

*Report shows total received (gifts + pledge payments)

Adjustments:
- moved Laport $49,552.62 from Annual to Quasi-Endowment
- moved Lye estate $10,000 from True Endowment to Quasi-Endowment

Annual Giving: The Big Picture
Our generous community contributed $1,737,200 in annual giving in 2016. This was a 7.4% increase over annual giving in 2015 while also maintaining the strong 13% growth of the prior year.

Below are charts showing total annual gifts by donor type, including individuals, companies, organizations, foundations and organizations (nonprofits, churches, civic
The most significant growth was by companies whose giving increased by 26.7% ($70,859) over the prior year.
Giving by Geography

Not surprisingly, 86.3% of our total annual giving was received from within North Carolina. Below are charts showing giving by county (top counties only). As in years past and as expected, more than 55% of the total annual gifts come from Wake and Durham counties.

Giving from supporters in Wake and Durham Counties grew by 6.6% and 6.9% respectively where our programs are located and our fundraising strategies are centered. More than $100,000 of the Wake County giving came from two sources: RMHC of NC and the MAC, Inc. Co-Op.

There is some correlation between counties where significant numbers of guest families live, such as Cumberland, Johnston, Robeson and Wake.

(See Addendum 1: Guest Stays by NC County – 2016)

Cumberland County support grew by 17.8% due primarily to McDonald’s owner/operators and former guest families.
## 2016 Giving by NC County

<table>
<thead>
<tr>
<th>Rank</th>
<th>County</th>
<th>Amount Given</th>
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<tbody>
<tr>
<td>1</td>
<td>Wake</td>
<td>$615,895</td>
</tr>
<tr>
<td>2</td>
<td>Durham</td>
<td>$363,058</td>
</tr>
<tr>
<td>3</td>
<td>Orange</td>
<td>$61,962</td>
</tr>
<tr>
<td>4</td>
<td>Cumberland</td>
<td>$46,387</td>
</tr>
<tr>
<td>5</td>
<td>Johnston</td>
<td>$33,184</td>
</tr>
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<td>6</td>
<td>Mecklenburg</td>
<td>$32,266</td>
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<tr>
<td>7</td>
<td>Carteret</td>
<td>$23,875</td>
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<td>8</td>
<td>New Hanover</td>
<td>$20,917</td>
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<tr>
<td>9</td>
<td>Guilford</td>
<td>$18,720</td>
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<td>10</td>
<td>Brunswick</td>
<td>$18,684</td>
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<td>11</td>
<td>Forsyth</td>
<td>$17,470</td>
</tr>
<tr>
<td>12</td>
<td>Robeson</td>
<td>$14,596</td>
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## 2015 Giving by NC County

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<th>Rank</th>
<th>County</th>
<th>Amount Given</th>
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<tbody>
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<td>2</td>
<td>Durham</td>
<td>339,663</td>
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<tr>
<td>3</td>
<td>Orange</td>
<td>63,045</td>
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<td>4</td>
<td>Cumberland</td>
<td>39,368</td>
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<tr>
<td>5</td>
<td>Johnston</td>
<td>23,803</td>
</tr>
<tr>
<td>6</td>
<td>Craven</td>
<td>22,527</td>
</tr>
<tr>
<td>7</td>
<td>Mecklenburg</td>
<td>21,186</td>
</tr>
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<td>8</td>
<td>New Hanover</td>
<td>17,929</td>
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<tr>
<td>9</td>
<td>Brunswick</td>
<td>17,222</td>
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<tr>
<td>10</td>
<td>Robeson</td>
<td>13,769</td>
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## 2014 Giving by NC County

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<th>Rank</th>
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<tr>
<td>1</td>
<td>Wake</td>
<td>533,459</td>
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<tr>
<td>2</td>
<td>Durham</td>
<td>314,887</td>
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<td>3</td>
<td>Cumberland</td>
<td>46,992</td>
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<tr>
<td>4</td>
<td>New Hanover</td>
<td>41,445</td>
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<tr>
<td>5</td>
<td>Orange</td>
<td>41,072</td>
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<tr>
<td>6</td>
<td>Craven</td>
<td>32,937</td>
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<td>7</td>
<td>Mecklenburg</td>
<td>25,681</td>
</tr>
<tr>
<td>8</td>
<td>Johnston</td>
<td>21,737</td>
</tr>
<tr>
<td>9</td>
<td>Granville</td>
<td>16,615</td>
</tr>
<tr>
<td>10</td>
<td>Guilford</td>
<td>13,275</td>
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</table>
4. 2017 Strategic Goals for Development

The tactics in this plan tie directly to the goals and objectives in the RMH Strategic Plan and the Operational Plan for 2017. The primary Operational Plan objectives that relate to development & communications are the following:

Goal 1: To provide high quality programs of comfort and support for seriously ill children and their families.

1.2 Provide a volunteer experience that inspires long-term connections.

1.2.1 Develop & implement a stewardship roadmap for new and returning volunteers. Create a process for identifying and soliciting major gift prospects.

Q.1 Volunteer services & development staff meet to create the ideal flow chart of touchpoints for both new and recurring volunteers, identifying staff responsible, timelines & resources needed.

Q.2 Implement the plan

Q.3 Assess process and adjust the strategy as needed

1.3 Steadfastly ensure long-term financial resources required to carry out our mission.

1.3.2 Launch a planned giving program.

Q.2 Develop launch plan for a planned giving program. Complete planned giving collateral (brochure, website).

Q.3 Identify and flag existing planned giving prospects in Exceed. Begin communicating with prospective planned giving donors.

Goal 2: Be a charity of choice.

2.1 Build, nurture and grow donor-centered relationships with community partners and honor supporters with exceptional stewardship of the resources entrusted to our care.

2.1.1 Seek ways to grow our culture of philanthropy.

Q.2 Develop training plan for board, staff & volunteers

Q.3 Implement plan

Q.4 Implement plan
2.1.2 Develop a stewardship roadmap which honors supporters with exceptional stewardship.

Q.1 Development team maps current stewardship practices and identifies opportunities for deepening relationships with supporters of all types.

Q.2 Implement plan

Q.3 Implement plan

Q.4 Implement plan

2.1.3 Create & launch a PR campaign designed to grow awareness in Wake County

Q.1 Assemble a small team to work on this project & create plans

Q.2 Prepare

Q.3 Launch PR campaign

2.2 Steadfastly ensure short-term financial resources required to carry out our mission.

2.2.1 Develop and implement a comprehensive development plan to exceed our annual, operating goal.

Q.1 – Q.4 Development plan & implement

2.3 Grow our relationship with the McDonald’s family.

2.3.1 Continue McDonald’s-specific communications and fundraising strategies.

Q.1 Include McDonald’s-specific strategies in Development Plan
5. Board + Committee Leadership in Fundraising
Board of Trustees leadership in is critical to our fundraising success. In addition to making personal and corporate gifts, outreach by our leadership will be instrumental in meeting our goals. Following are the 2017 giving opportunities that will make the biggest impact on the organization.

Serve as “Champ-Bassadors”

As champions of our mission and ambassadors to the community, we rely on our volunteer leaders to make connections to natural partners – whether a neighbor who cares about children, professionals in the medical industry, companies which support employee volunteering, etc.

Our 2017 plan provides opportunities to 1) make new connections, 2) encourage financial commitments and 3) provide stewardship for gifts already given to RMH.

1) Connections / Introductions
   • Pancake Breakfast & Tours @ Durham House – Friday, March 10, 2017
   • Holiday Open House Durham House – December 2017
      WakeMed House – December 2017
   • Program Tours may be scheduled at any time
   • Especially good times for House tours include:
      ▪ Durham House – dinner (6 pm), activities (7pm) or during the work week
      ▪ WakeMed House – Wednesdays at lunch, during the meal in the units

2) Financial Commitments
   • Recruit hosts for HOPE events
   • Solicit Gala sponsorships or make introductions for staff to solicit
   • Assist in making connections for other sponsorships or financial gifts, such as:
      ▪ Adopt-a-Room sponsors
      ▪ Designating RMH as a beneficiary of an event

3) Stewardship
   • Be a summer ambassador for adopt-a-room donors
   • Be an ambassador for our gala sponsors
   • Participate in the annual Thank-a-Thon in November
6. 2015 & 2016 Annual Giving + 2017 Appeal Goals

[See Addendum 2: 2017 Appeal Goals]

7. Fundraising Calendar
In order to simplify the presentation, attached is our 2017 operational plan showing fundraising strategies by activity type, month and staff leadership. In establishing this plan, the development team reviewed our fundraising program in a variety of ways, including by constituent type, geography, giving behavior, gift type and by appeal.

As in prior years, the plan emphasizes not only bringing in new donors (acquisition) but also minimizing the loss (renewals) of existing donors. To support this analysis, the team is utilizing AFP’s (Association of Fund Raising Professionals) new Growth-in-Giving measurement tools. We expect this will help identify opportunities to further strengthen the results of our fundraising program.

[See Addendum 3: 2017 Development Plan by Month]

8. Stewardship
ALL donors receive a minimum level of communication and stewarding of their gifts, including:

- Gift acknowledgment letters which are written to convey gift impact
- An Annual Report to the Community, which acknowledges gifts, highlights accomplishments and shares goals for the coming year.
- Love Notes, a donor-focused newsletter emphasizing the impact of giving
- Hand-written thank you note for donors of $250 - $999
- Thank you call and special invitations for donors of $1,000+
- eNews, if email address is available

In 2017, a formal donor stewardship plan will be developed. Plans will build on the stewardship activities in the past and involve the board of trustees, committee members and other volunteers, as well as RMH staff.

9. Planned Giving
The groundwork for a planned giving program was laid in 2015 with the creation of Endowment Policies. In 2016, a list of planned giving donors (past and current) were identified and coded in Exceed. Planned giving was promoted via our newsletters and “I have included RMH in my estate plans” was added to the majority of our reply
devices. In addition, website promotion was drafted for the new site which will be launched in early 2017.

This year, we will continue to promote the Security Blanket Society through targeted mailings. Some of this year’s activities will include:

- Finalize printed brochure about Security Blanket Society, as well as letter templates for new members
- Develop signage/recognition at the Durham House
- Begin sharing materials with individual donors
- Identify and code planned giving prospects from our existing donor base so a direct mail program can be started in late 2017.

❤❤❤