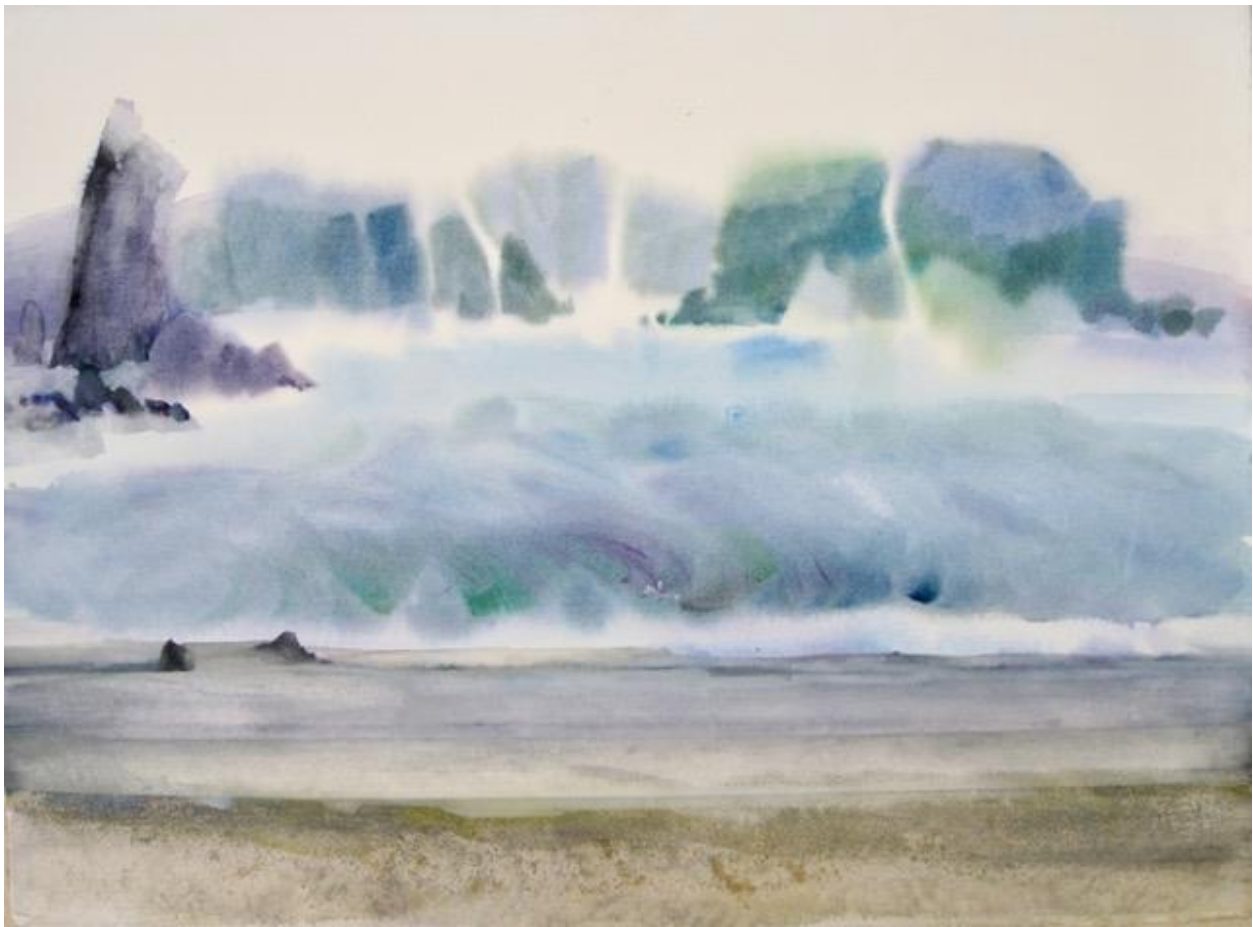




# MENDOCINO COAST HEALTHCARE FOUNDATION

## THREE-YEAR DEVELOPMENT & ENGAGEMENT PLAN 2022-2024





The Mendocino Coast Healthcare Foundation (MCHFoundation) is a stand-alone 501(c)(3) not-for-profit organization, working to ensure that people in the Mendocino Coast healthcare district, residents, and visitors alike, have access to essential healthcare services - including but not limited to - emergency and clinical services, preventative programs, and health-related community education. Its mission is to support and improve the health of our coastal community.

MCHFoundation is the vehicle through which the community invests its money in the need for effective, affordable, and accessible healthcare along the Mendocino Coast. MCHFoundation accomplishes this by raising money to fund specific projects and equipment.

**Mission**

To support quality health and wellness services for people in the Healthcare District.

**Vision**

A healthy community on the Mendocino Coast.

**Development Team led by**

Mary Kate McKenna, CFRE—Executive Director

DawnMarie Kotsonis – Major Gifts Officer

**Development Committee Chair**

Paula Hudson, Member MCHFoundation Board of Directors

## DEVELOPMENT PROGRAM OVERVIEW

Mendocino Coast Healthcare Foundation has continued to build on the success of nearly 40 years of supporting the healthcare needs of the community and the Mendocino Coast District Hospital along our rural Mendocino coastline. The Foundation rebranded in 2019 and this change allows for an expansion of opportunities for the Foundation to respond to the healthcare needs of our constituents within our service region.

The Board of Director's and leadership's determination to invest in a more focused Development Team shows the evolution of the Board's growth to include a broader range of fundraising activities to meet the demands of our communities. This demands continued innovation, efficiency, effectiveness, and accessibility to all who need the services of our healthcare providers. Meeting these challenges means investing in the experience and skills of dedicated Development professionals and this Development Plan will articulate the ideas and goals for the Foundation to continue to be counted as a strategic partner in these healthcare initiatives.

Over the course of the next three years (2022, 2023, and 2024), the Development Team will work to ensure that the following key elements of the Development Program will be expanded, formalized, and solidified.

- Build a solid Team mentality that includes an inclusive, diverse, and accessible culture that rewards creativity, authenticity and deep engagement in the mission and vision of MCHFoundation. Ensure the Team articulates the Foundation's mission and vision with each engagement.
- Establish a close working relationship with the Board of Directors and Development Committee that clarifies how the Development Team can best serve the vision and goals set forth by both governing bodies.
- Provide input within the Strategic Plan process to ensure the Development Team is clear on MCHFoundation's current and long-term funding goals and ensure the development of specific funds that address **community needs**.
- Review of policies and procedures in the Development Program that mirror other successful healthcare foundations similar to our service region and size. Analyze community healthcare needs by deepening the partnerships with healthcare leaders, clinics, and physicians/healthcare providers to ensure the MCHFoundation has the information to create the appropriate narratives and stories for our donors to engage in impactful philanthropy.
- Analyze fundraising opportunities within our service region to identify program arcs that will create a steadier stream of funding for the MCHFoundation's resiliency and sustainability.
- Incorporate plans and initiatives that find solutions to the above goals, ensuring staff, board and volunteers all are clear, focused and empowered to implement.
- Evolve Winesong! strategy, processes, and procedures to ensure events are sustainable and that all processes are formalized and confirmed.
- Review of all aspects of fundraising to optimize opportunities that increase income and decrease expenses while ensuring events will be a quality staff, volunteer, and participant experience.

## **FISCAL YEAR 2022 IMMEDIATE GOALS**

MCHFoundation’s Development Program fundraising goal for FY 2022 is \$976,900. Leadership will be focusing on utilizing the highly skilled team to support the Development Program. See the attached Organizational Chart for 2022 that will include a Director of Philanthropy, and realignment of staff roles to better serve upcoming strategic plans.

Plans for this fiscal year include a full analysis of the identified opportunities within our service region that will result in sustainable funding streams for MCHFoundation with the focus on fine-tuning, broadening, implementing, and establishing the variety of funding opportunities for donor engagement and support. A determined focus on all aspects of fundraising by executive leadership, the Board, and the Development Committee led by the Executive Director and Director of Philanthropy will help reach these goals.

We recognize that the rapid growth of expenses related to adding programming staff means the Team must focus on meeting or exceeding the budget goals determined by MCHFoundation. To do so the Development Team will utilize the following ideas to help ensure MCHFoundation’s income streams show the benefit of the increased investment.

- Canvas other organizations to mirror successful efforts without overloading our service region with similar initiatives.
- Network with Association of Fundraising Professionals (AFP) and Association of Healthcare Philanthropy (AHP) to find new pools of support and advice for efficiencies and best practices for our proposed indicatives and in solidifying the Development Program itself.
- Ensure all staff have clearly identified roles, duties and focus areas and that lines of authority and paths for communication are outlined.
- Create efficient reporting to promptly analyze and adjust in a nimble fashion.
- Successfully transition duties and responsibilities to the Development Team that are related to fundraising and event production ensuring leadership and the Board are confident that the Development Team is ready to accept all responsibility for future implementation.

### **DEVELOPMENT PROGRAM BUDGET**

<b>2022 BUDGET GOALS</b>				
	<b>Foundation Fundraising for Operations</b>	<b>Winesong! Branded Events</b>	<b>Restricted Funds</b>	<b>Total</b>
<b>Unrestricted Donation</b>				
Monthly Giving	12,000			12,000
Major Gifts	245,000			245,000
Planned Giving	20,000			20,000
Annual Appeal	100,000			100,000
Corporate Partners		2,500		2,500
<b>Restricted Donations</b>		200,000	60,000	260,000
<b>Event Revenue</b>				
Sponsorships		54,500		54,500
Ticket/Other Revenue		174,700		174,700
Auction/Raffle Income		137,000		137,000
<b>Total Program Revenue</b>				<b>976,900</b>

---

## **DONOR CULTIVATION OF UNRESTRICTED CONTRIBUTIONS: \$377,000**

The goal is to raise a portion of MCHFoundation's operating budget from individual, corporate and **foundation donors**. The Director of Philanthropy, in close collaboration with the Executive Director and Development Committee, will coordinate and implement donor outreach programming.

**NOTE: Suggested new initiatives or program arcs are *italicized***

- Conduct the following donor analysis and create appropriate retention and engagement action plans:
  - Lapsed Major Donors
  - Potential New Major Donors
  - Major Donors with higher capacity potential
  - Goal: Actively manage top 100 donors (: e.g., pay constituent extra attention and look for opportunities to increase the next ask (phone call, card, invitations to lunch)
- Create and launch *action plans for the following community partners*:
  - Healthcare
  - Conservation/Outdoor
  - Tribal
  - Community Foundations

### **RENEW, REVISIT, REINITIATE**

- Plan, schedule and promote exclusive events for major donors and prospects:
  - June Major Donor Reception
  - Winesong! VIP Reception, and *adding a*
  - *Holiday Open House*
  - *Board and Advisory Council Social (late Winter/Early Spring)*
  - Promote *the* Monthly Recurring Gifts Program.
- *Review Board giving requirement*, discuss and formalize an expectation that includes and accommodates all levels of capacity but extends beyond direct cash donations e.g., influence giving, affluence giving, volunteer work, in-kind donations.
- Review and revitalize Employee Giving Program and Matched Giving Program through employers in the area.
- Reconnect with and increase *physician* sponsors and major donors. Plan *Executive Director's Circle Dinner* (hosted by the Executive Director and staffed by the Development Team). **This dinner will provide an opportunity to deepen awareness and engagement with our service region healthcare providers who have influence and affluence.** The Executive Director will review current projects and staff will be positioned to gain insight and provide an opportunity for healthcare provider input into how MCHFoundation can best serve their department and or clinic needs.
- Create a list of foundation/funding organizations for healthcare grants where MCHFoundation can become a funding pass-through agency where unrestricted funds can be allocated through indirect or administrative cost allocations within the grant award.

## BUDGET BENCHMARKS:

Campaigns	2021 Stats		2022 Goals	
Board Giving	80%	\$30,000	100%	\$30,000
Monthly Giving	14	\$6,000	30	\$12,000
Annual Appeal		87,000		\$ 100,000
Major Gifts:		\$94,000		\$215,000
Over \$1,000	23		30	
Over \$2,500	9		10	
Over \$5,000	8		10	
Over \$10,000	3		5	
Over \$20,000	3		5	
Over \$50,000	0		1	
Planned Giving	1	\$15,000	1	\$20,000
<b>Total Unrestricted Giving Goal</b>				<b>\$377,000</b>

## TANGIBLE PROGRAM BENCHMARKS:

- Finalize all process, procedure, and policy documents to ensure programmatic efficiency.
- Clarify terminology for what specifically is considered the donation/sponsorship levels with tiered benefits to encourage next level contributions.
- Identify and have giving analysis for all donors and development program arcs.
- Ensure 100% Board **giving**.
- Determine feasibility and host an *Executive Director Circle Dinner* to increase donations from our healthcare community of physicians.
- Schedule and promote four exclusive events for major donors and major donor prospects (currently hosting two events).
- Increase Monthly Recurring Gifts Program members to ten households (currently at two households), with five of those at the annual major donor level.
- Create 2021 benchmarks for increasing the number of donors, the average gift and overall unrestricted contribution goal for 2021 budget purposes.
- Work with Development Committee to include *contingency funding plans* for all budget line items when faced with disruptions in traditional fundraising methods.
- Meet or exceed budget benchmarks.

## YEAR-END APPEAL GOAL: \$100,000

Each year, a specific year-end ask is made of existing members and contacts. These funds make up the gap portion of the budgeted individual donor contributions. Historically, this campaign launches in October and the intent is to capitalize on the end of the year donor cycle. Review and consider annual appeal, versus specifically a “year-end” appeal as part of a larger donor cultivation plan is a critical element of MCHFoundation’s fundraising plan.



Due to the ever-increasing number of non-profit organizations that launch year-end appeals, the focus for the 2022 fiscal year will be to:

- Analyze historical year-end campaign success and determine if a shift in implementation might be beneficial, both from a timing standpoint and for appeal efficacy.
- Establish an annual theme that runs through each campaign and communication focus that is responsive to a prevailing concern in the community that the Foundation has become aware of – thinking of an annual “tag line” that highlights the Foundation as a solution to a problem. This would then become the focus of our grants program, our annual appeal, and other targeted Asks. *Example: Go All In for coastal nurses.*

**BUDGET BENCHMARKS:**

Goal of \$100,000 with a stretch goal if determined by an **Unrestricted Contributions Budget** gap.

**TANGIBLE BENCHMARKS:**

- Create a calendar for implementation no later than June 1, 2022.
- Lead appeal letter development: including a multi-dimensional targeted appeal that includes new, lapsed, and increased giving focuses.
- Find a large, matched funding opportunity through a foundation or individual to motivate contributors.
- Meet or exceed budget benchmarks.

---

**RESTRICTED CONTRIBUTIONS: \$60,000 FOUNDATION, \$200,000 WINESONG!**

**Events**

**RESTRICTED FUNDS FOR FOUNDATION USE: \$60,000**

**COVID-19 Mendocino Coast Response Fund:**

In response to the current public health crisis, MCHFoundation has established the COVID-19 Mendocino Coast Response Fund. Launched in March of 2020 with \$25,000 in Board designated funds, the goal is to reach out to the community and to donors to solicit funding to directly help the healthcare needs of our partner health practitioners as they respond to the rapidly changing needs of the pandemic.

**Other Restricted Funds:**

Review balances, fund descriptions and analyze community needs that meet the restrictions of fund release and craft plans for other targeted funds that may need bolstering:

- **Ambulance Fund** – 911 Raffle (see Events portion of the plan) to bolster this restricted fund in preparation for an ambulance request in the future.
- **Elwin Cox Memorial Cancer Fund** – continued fundraising through the Cox Family.

**FUND-A-NEED: \$200,000 THROUGH WINESONG! Series of Events**

Through a series of events (see schedule Attachment **XX**) fundraise for restricted funds through the events as ongoing Fund-A-Need campaigns. The Development Committee has identified the Fund-A-Need focus for 2022 as the Excellence in Nursing initiative, expanding on current information and opportunities.

## RENEW, REVISIT, REINITIATE

- *Solicit “grateful patient” stories and opportunities to donate to a “pay it forward” fund.* Craft monthly stories and send along with the Eblast to educate, outreach, and resonate with donors who have been affected by these healthcare crises but have recovered and want to provide funds for continued care of others in need. Revisit planning documents from the Development Committee Research on this issue previously and determine if viable.
- Research and outline *focused “days” for a push toward.* Restricted contributions for those with a connection to the disease or health issue, National Wear Red Day, Breast Cancer Awareness Month, etc.
- Path of Friends and Legacy Board at AHMC: research and review for Development Committee Meeting discussion.

---

## EVENTS:

### EVENTS: *New or Existing Initiatives to Revisit*

Add consistent revenue streams by investigating a series of smaller events that engage donors, stakeholders, and partners to provide more intimate opportunities to donate for participation. Use caution and careful planning to ensure these events do not overrun the Development Team – coordination with donor hosts can offset the workload. Ideas for these types of events:

- *VIP / Major Donor Reception* – Annually at Ledford House. A hosted event to show acknowledgment and appreciation of our major donors for both the Foundation and Winesong! Held annually in June, the invite list is to include any major donors of over \$1,000 total giving in the last 365 days, monthly giving members, and identified estate plan households.
- *911 Raffle for Ambulance Fund* – revisit this small event to bolster the ambulance fund. Recommendation is for this to become an annual event during the week of National First Responders Day of October 28<sup>th</sup>
- *Small scale crafted experiences pairing donor interests* (i.e., art and wine music and wine, paired food and wine, art and nature, local food, themed dinners, etc.)
- Collaborate with non-profit partners to create events that fund both organizations that target healthcare initiatives such as: *health and wellness (races, walks, etc.), health and nature or mental health and nature.*



---

**SPONSORSHIP GOAL: FOUNDATION \$2,500; WINESONG! \$55,000**

*3 Year Focus –  
Shift Sponsorship Programs from just Winesong!  
to consistent, higher donation level, Foundation Support*

*Analyze current corporate culture* along the Mendocino Coast by reviewing major employers in the area, working with the Mendocino Chamber of Commerce on potential new businesses that are looking for collaborative partners.

*Revisit Pharmaceutical and Medical Technology Companies* to create opportunities to sponsor the Foundation's work, careful to ensure conflicts of interests are thoroughly discussed along with public perception and optics of the connections.

- Mendocino Coast Healthcare Foundation Annual Sponsorship program is a way to engage corporations and businesses in a consistent and higher donation to our Foundation while benefitting their marketing and environmental values.
- MCHF Sponsors can choose from a tiered sponsorship level program ranging from \$1,000 to \$20,000 with corresponding benefits.
- MCHF has successfully continued the annual corporate sponsorship program through Winesong! and has a goal to increase the number of sponsors and increase the level of sponsorship donation for current sponsors of Winesong!

**Statistics for 2021**

**12 Cash Sponsors (total value: \$47,400)**

**6 In-Kind Winesong! Production Sponsors (total value: \$50,000)**

**TANGIBLE BENCHMARKS:**

Identify and engage a total of three new cash sponsors and three new in-kind sponsors for a \$15,000 increase in the Winesong! Cash Sponsorship Program and a 5% reduction in production expenses with in-kind donations.

**Focus for Future Programming**

- Review and update annual sponsorship program to include:
- Review sponsor levels and what is provided per level
- Confirm details about cash and in-kind giving and ensure clarity in communication and presentation.

Plan monthly meetings with specific sponsor donors to create a deeper relationship and ensure their business needs are met by the Sponsorship Program.

- Meet or exceed budget benchmarks.

---

## **PLANNED GIVING PROGRAM: BUDGET NOT SPECIFIC**

**The Planned Giving Program** has not been a focus in prior fiscal years, this year we will take steps to educate local financial advisors and identify donors that have included MCHF in their estate planning.

### **Focus for FY 2022-2024**

- Review policies related to **gift** acceptance, acknowledgement, and fund restrictions to ensure compliance with current GAAP (Generally Accepted Accounting Principles) and Development best practices.
- Review and revise materials, marketing and branding of this planned giving program.
- Define and clarify benefits for Planned Giving Program members.
- Re-engage with existing legacy donors. Identify and confirm who should still be listed as part of this program and outline a plan for consistent and focused messaging on the benefits of belonging to this program.
- Curate a referral list of regional professional advisors for planned to give that will be provided to prospective donors upon request, as it is critical for donors to have competent assistance in charitable, legal, and tax planning in this specialized area.
- Host a workshop, seminar or a “planned “giving happy hour” for legal and financial professionals who understand charitable and planned giving techniques. Presentation to be given at Event to educate attendees on the Foundation’s work and inclusion in their estate planning tool kit to increase planned giving referrals for existing clients.
- Educate staff on the Foundation’s bequest.

## **DEVELOPMENT PLANS OF ACTION**

**See attached Community Partner Action Plans  
(and “tangible benchmarks” throughout document)**

### **DEVELOPMENT TEAM ROLES AND FOCUSED GOALS**

#### **Board of Directors**

The Board of Directors serves as the guiding and governing body of the organization, the Board provides oversight and leadership. With support from the Executive Director and Development Director, the Board helps envision, directly solicit, and approve fundraising strategies to increase funding for the Foundations’ initiatives.

#### **Executive Director**

The Executive Director works cooperatively with Board of Directors in developing and implementing the financial plan; provides leadership, vision, and strategic direction for the Foundation. The Executive Director implements policy approved by the Board, manages the Foundation fundraising and outreach operations, manages staff, is responsible for the day-to-day operations of the Foundation, and represents the Foundation in the community.

#### **Development Director**

In partnership with the ED, the Development Director is responsible for fundraising, development and event activities and operations, including primary responsibility overseeing Winesong! the annual wine tasting and a charity auction event. The Development Director will help forge new relationships to build the organization’s visibility, impact, and financial resources. The Development Director also spends time personally soliciting donors, partners, and sponsors.

#### **Development Assistant**

The Development Assistant provides a wide range of administrative, project and event support with duties ranging from data entry and clerical support to project and event assistance, to marketing and volunteer assistance under the direction and in support of the Development Director.

#### **Marketing & Communications Director**

Working in partnership with the Executive Director and Development Director, the Marketing & Communications Director develops, executes, and implements communications and marketing strategies for the Foundation and all events and campaigns it produces

#### **Production Coordinator**

Under the supervision and direction of the Development Director, the Production Coordinator assumes primary responsibility for the logistical coordination of Winesong! Works as part of a team of staff, consultants, outside contractors and volunteers dedicated to the successful outcome of Winesong! The Production Coordinator will assist with additional events and projects as available and at the request of the Development Director.

## DEVELOPMENT COMMITTEE ROLES AND FOCUSED GOALS

- The Development Committee will meet six times a year (or every other month) to review the progress of the plan and, with Development Team, will identify problems and solutions.
- Committee and Development Team work together to identify and cultivate highest capacity new and existing donors (includes foundations).
- Committee members receive donor cultivation assignments with a regimen of 4-6 contacts per year, per donor.
- Committee and Development Team will organize donor assignments for Board with regular reporting at board meetings.

## DEVELOPMENT COMMUNICATION KEY ITEMS

- *Annual Report:* Include a return donation envelope in each mailed report and a donation button with ASK on each pdf/mailed Annual Report.
- Eblasts: Include Donate links, Planned Giving Circle, and Specific Focus Ask language.
- *Thanksgiving Card: A thank you card to all donors that have given in the past 365 days. Arrives before Thanksgiving; this is not a donation ask. Simple, elegant card from board and staff. Hand addressed and mailed first class.*
- Annual Appeal: Sent to full database. Includes a letter from the Executive Director detailing successes over the last year and outlook for upcoming year.
- Social Media
- Special Event Invitations/Brochures
- Winesong! Invite and other updates as prescribed in the separate **Winesong! Event Timeline.**
- VIP/Major Donor Reception Invite
- Winesong! VIP Friday Night Party Reception Invite

## DEVELOPMENT COMMUNICATION CALENDAR

January	<p>Prepare Annual Report DRAFT for Development Committee Review            Develop Quarterly Development Dashboard for Board Meeting  <i>Prepare Executive Directors Circle Invite and Mail</i></p>
February	<p>Development Committee Meeting  <i>Executive Directors Circle Dinner for Physicians and Partners</i></p>
March	<p>Develop Quarterly Development Dashboard for Board Meeting            Development tasks per Winesong! Timeline</p>
April	<p>Development Committee Meeting            Present Development Plan DRAFT &amp; Review            Communication items per Winesong! Timeline</p>
May	<p>Develop Quarterly Development Dashboard for Board Meeting  <i>Annual Appeal Planning Meeting</i>  <i>Determine print materials for annual appeal communications</i>  <i>Design and personalize annual appeal mailer before Board retreat</i>            Communication items per Winesong! Timeline</p>
June	<p>Development Committee Meeting            VIP/Major Donor Reception  <i>Mail Annual Appeal</i>            Communication items per Winesong! Timeline</p>
July	<p>Develop Quarterly Development Dashboard for Board Meeting            Communication items per Winesong! Timeline</p>
August	<p>Development Committee Meeting            Communication items per Winesong! Timeline</p>
September	<p>Pinot Noir Celebration            VIP Friday Night Party            Winesong! (September each year)            Develop Quarterly Development Dashboard for Board Meeting</p>
October	<p>Development Committee Meeting            Draft FY Development Program Budget  <i>Meet to plan Annual Sponsorship strategy</i>  <i>Design/Send Thanksgiving Card</i>            Analysis and Reporting on Winesong!</p>
November	<p>Develop Quarterly Development Dashboard for Board Meeting            Review 2021 Development Plan of Action with Development Team/Committee  <i>Prepare Calendar of Small Events (12)</i>  <i>Prepare Holiday Open House Invitations</i>  <i>Mail and distribute Annual Sponsorship appeal emails</i></p>
December	<p>Development Committee Meeting  <i>Mail Calendar of Small Events Brochure – Launch Online</i>  <i>Holiday Open House</i></p>

## APPENDIX A

### Proposed Acknowledgment Plans

FOUNDATION ACKNOWLEDGMENT PLAN		
Donation Level	Acknowledgement Action	Staff Lead
Online donations < \$250	Automatic acknowledgment generated by Greater Giving	Monitored by Development Assistant
Mailed donations < \$250	Signed, hand-addressed personalized acknowledgment letter	Development Director
Over \$250	Handwritten note on MCHF note card	Development Director
Over \$500	Handwritten note on MCHF note card Phone Call	Development Director Executive Director
New Donor	Handwritten note on MCHF note card with package about the Foundation	Development Director
Over \$1,000	Handwritten note on MCHF Note Card Phone Call	MCHF Board Member Executive Director
Specific Campaign Donations – any size	Handwritten note on MCHF Card Acknowledgment list (per <b>Campaign Plan</b> )	Development Director Monitored by Development Assistant
Major Life Events (death, birth, birthdays, anniversaries, moves)	Handwritten note on MCHF Note Card Related card signed by Board	Development Director Facilitated by Executive Director
WINESONG! ACKNOWLEDGEMENT PLAN		
Donation Level	Acknowledgement Action	Staff Lead
Fund A Need (any level)	Auto generated thank you letter after Event	Development Assistant
In Kind Donation	Personally, signed letter	Development Director, facilitated by Development Assistant
Auction Winners	Auto generated IRS tax compliant letter Handwritten thank you note on Winesong! Note Card	Development Assistant Development Director
Auction Item Donors	Auto generated thank you letter after Event	Development Assistant
Winesong! Sponsors	Auto generated thank you letter that is IRS tax compliant after Event Handwritten thank you note on Winesong! note card All sponsor tiered marketing	Development Assistant Development Director Marketing & Comms Director