Beaverhead Trails Coalition Strategic Plan
Fundraising

Fundraising Goals

Long Term Sustainability and Growth – Develop diverse and reliable revenue sources to ensure that BTC remains sustainable and is able to grow as needed to continue to achieve its mission and goals over the long term. Funding sources should include government and foundation grants, large donors, business donors, in-kind donations, memberships, events, etc. BTC should not be overly dependent on any one funding source. In combination, all the funding sources need to reliably support the annual budget from year to year.

Staffing and Contractors – Ensure adequate operational funding to maintain the current half-time Executive Director position; expand the ED position beyond half-time if needed; fund additional staffing and contractors as needed.

Project Funding – Fund the top priority projects for BTC's four Programs, including meeting the capital funding goals for specific land acquisition, trail easement and trail construction projects.

Memberships – Increase the number and diversity of individuals, families and businesses that support BTC through annual financial and/or in-kind donations.

Fundraising History and Accomplishments

BTC has an impressive track record of securing significant funding for projects and programs. The organization also achieved a major milestone in 2016 when it funded a half-time Executive Director position.

Most of BTC's significant fundraising achievements have been grants from government and foundation sources including the Montana Fish and Wildlife Conservation Trust (MFWCT), The Kendeda Fund, The LOR Foundation, and the Montana Department of Transportation. BTC has also secured $250,000 in private donations for the High Trails land acquisitions. The United Way has been an important source for smaller grants supporting both projects and operations. Operations are also supported through smaller private donations. Several projects have been supported with in-kind donations from local contractors.

Accomplishments

- Since 2014, BTC has raised over $400,000 for the Dillon Town Overlook Trail and High Trails Project, and completed the purchase of Phase I & II lands, acquiring 781 acres of new public land.

- In Spring, 2017, BTC received a $100,000 grant from the LOR Foundation to help create a small public park on the Beaverhead River and plan important new trail connections at the north end of town.
- In 2014, BTC received a grant of $24,000 for construction of the Pigtail Trail, including $19,000 for a bridge over Owen Ditch.
- Between 2011 and 2014, BTC raised over $115,000 in Montana Department of Transportation grants for in-town sidewalk and intersection improvements, as well as bicycle/pedestrian education and awareness projects.

Current Program Status, Needs & Challenges

BTC is currently going through a phase of significant growth and transition. Major program achievements, ambitious goals, and the addition of a paid half-time Executive Director are creating significant fundraising challenges and opportunities. In the last several years the operating budget increased from $500 To $30,000.

Leadership and Volunteers

Decision-making about fundraising is done by the Board, the Fundraising Committee and the Executive Director. Volunteers from outside these two committees help to varying degrees with different fundraising efforts.

Fundraising Committee

A small Fundraising Committee is responsible for most of BTC's fundraising efforts. The committee is currently made up of two board members, who work closely with the Executive Director. The committee is open to new members that have an interest in fundraising.

Data Committee

BTC also has a Data Committee that is responsible for organizing and maintaining the organization's contact, membership and donor records. As of Fall 2016, approximately 300 records had been entered in BTC's database.

BTC is using Donor Perfect, an online database designed to help non-profit organizations track constituents' contact and fundraising information.

Fundraising Sources

BTC has a strong track record of fundraising for specific projects. The Phase III High Trails land acquisition is its most ambitious fundraising challenge yet. At the same time, as the organization matures and grows it faces an increasing challenge to sustainably fund its annual program and operating expenses. With a major capital campaign, in addition to a growing annual budget, BTC is entering a new phase of organizational development – taking on larger and more complex challenges as well as the opportunity for much greater accomplishments and positive impacts on the community.

Grants

BTC has been successful in securing large grants for big projects from government and private foundations, as well as small grants from funders such as the United Way. BTC will need to maintain this track record of success to achieve its goals over the next five years.

To build on this success, it would be valuable for the organization to continuously evaluate and seek ways to improve its efforts to track upcoming grant opportunities, research potential new grant opportunities, and keep on top of all the tasks necessary to develop successful applications and maintain positive relationships with grant funders.

BTC has a subscription to GrantStation.com (https://grantstation.com/) to help with identifying potential funders, planning and developing grant proposals.

BTC will continue to use contracts with grant writers to prepare all large grant applications.

Events

Fundraising events have included Pint Nights, High Trails Phase I & II purchase celebrations, and 3 Fund Runs. The Climb the M Fund Run is now teamed with UMW Cross Country to make a larger, more successful event.

Major Donors

BTC has a small number of individual members who have made significant donations. Building a larger pool of major donors would be very valuable to the organization's long term stability and sustainability. However, achieving this goal may be challenging due to the community's demographics.

Membership

BTC currently has four types of annual donation memberships:

- $10 student membership
- $20 individual membership
- $30 family membership
- $50 membership which includes a BTC t-shirt
- $100 business partner.

Local fundraising has been challenging for BTC because of the community's small size and limited economic resources.

BTC communicates directly with members through periodic emails and hard copy mailings.

BTC has identified to diversify its membership as an important goal for the next five years.

Sponsor an Acre

BTC has begun a plan selling acre sponsorship for $550. Donors can break up the amount in payments or in full, and the price reflects the same amount that an acre costs BTC. Donors can also identify the specific acre of land they want to sponsor on the grid map, which will continue to update as sponsorships come.

Five Year Plan Strategies

Specific, high-priority fundraising objectives and challenges that BTC has identified for the next five years include:

- Raising $180,000 by August 2019 for the High Trails Phase III land acquisition.
- Funding several high-profile in-town projects. Most of the projects the In-Town Trails Program is exploring would require securing significant funding. However, these projects would likely take several years of planning and permitting before implementation funding is needed.
- Relaunching and expanding the Bicycle Recycling Program. If this program is expanded, it will need a larger budget than in the past and specific funding sources.
- Funding management and improvement of the High Trails area. As the owner of nearly 800 acres of public land (High Trails Phases I & II), BTC will need to fund a variety of management expenses as well as the cost of projects such as trail improvements, signage, fencing, a vault toilet, etc.
- Continuing to sustain the ED position.

Leadership and Volunteers

Integrating Fundraising Committee with Program Committees and Board

The Fundraising Committee should play a critical role in the organization's priority setting, helping to ensure that BTC's four program committees and the Board are communicating clearly about fundraising needs and are not overcommitting the organization.

The Fundraising Committee should participate actively in ensuring that proposed projects are adequately reviewed and assessed to determine:

- **Projected Expenses** – Try to be thorough, realistic, and conservative about the likely costs of proposed projects.
- **Timing** – Try to identify the likely timing of expenses.
- **Achievability** – Achievability will depend on two factors:
    1) Can BTC and partner organizations identify funding sources that could realistically provide the funding necessary within the proposed timeframe?
    2) How much staff and volunteer time will be required to meet the funding goal? Even if raising the target amount is potentially achievable, does BTC have the staff and volunteer capacity available within the proposed timeframe?

Ideas for integrating the Fundraising Committee with the program committees and the board could include:

- **Fundraising Calendar and Work Plan**– An important role of the Fundraising Committee should be to maintain and regularly update a comprehensive fundraising calendar and work plan that includes all planned fundraising activities and deadlines – grants, events, mailings, etc. The work plan should identify specific tasks and who will be responsible for them.

- **Program Budgets** – Work with the program committees to develop annual budgets for each program. Review each budget at least once during the year and update the fundraising calendar and work plan with any changes.
- **Participate on all Program Committees** – Each program committee to have one member who is also a member of the Fundraising Committee to ensure good communication and coordinated planning.
- **Proposals and Presentations** – Create a process for program committees to regularly review the fundraising calendar, flag anything that is missing or inaccurate, and give written and/or in-person proposals to the Fundraising Committee any time they want to take on a significant new fundraising commitment.
- **Fundraising Plans** – The Fundraising Committee could create a standardized template for drafting project fundraising plans. Fundraising Committee members could work with program committee members to develop written plans for specific projects, including deciding who will take the lead for different actions and how the work will be divided between program committee members and the Fundraising Committee.

BTC Annual Budget

The Fundraising Committee should be closely involved in the budgeting process to ensure that BTC's fundraising goals are realistic and achievable.

Multi-Step Process – One approach may be to work with each program committee to develop program budgets, then combine them into an annual budget for the organization. This could become a multi-step process, where the Board reviews the initial combined budget, recommends changes to the program budgets, then the program committees submit revised budgets.

- **Record Keeping** – the Fundraising Committee will maintain well-organized, accurate, easily searchable records of past projects, budgeting for proposed projects.

Staff and Volunteer Roles

It will be important to have clear agreement about the roles of different committee members and the ED to ensure workloads do not become unrealistic, and that each team member is comfortable and motivated about the roles they are asked to play.

- **Making "Asks"** – Many people are uncomfortable asking for money, and some people are much better at it than others, so it is particularly important to have clear agreement about who will play this role. When BTC is recruiting new members for the Fundraising Committee, it will also be very important to make sure that potential volunteers are not scared away because they assume they will be expected to ask donors for money. There are many other valuable skills that committee members could contribute such as organizing events, developing budgets, writing fundraising appeals, etc.
- **Engaging All Active Members** – All active BTC members should be encouraged to engage in the organization's fundraising efforts whether or not they are comfortable asking for money. They are all able to help the organization think creatively about effective fundraising strategies, or simply take small steps to help.

Committee Capacity, Structure and Approach

Over the next five years, BTC may need to increase the size of the Fundraising Committee and/or restructure the committee to meet changing organizational needs and challenges.

Important questions to address would include:

● Are there enough committee members to handle the workload?
● What are the roles that need to be filled on the committee?
● Which roles are the highest priorities?
● Do the existing committee members have the right combination of skill sets to fill the needed roles?
● If members are added, what roles/skill sets are most needed?
● What structure/approach makes the most sense? Should the Fundraising Committee lead all fundraising efforts, or should program committees lead some efforts with some degree of oversight/coordination by the Fundraising Committee and the Board?

Data Committee

Members of the Board, Fundraising Committee and Data Committee should meet annually with the ED to evaluate what is working well and what could be improved with maintaining BTC's data; the Donor Perfect database; and whether BTC is maintaining effective and efficient communication and allocation of workload between these four key players.

Fundraising Strategies

Fundraising in a small community with limited resources will require creativity as well as smart, focused strategies to ensure that BTC maximizes the return on the time and money it invests to generate revenue.

Website

BTC's website plays several important roles in the organization's fundraising efforts. All types of donors, from a large foundation considering a $100,000 grant to an individual considering a $10 contribution, are likely to look at the website to get an overview of BTC's work and/or the latest updates and details about specific projects.

First Impressions

The website should convey action, accomplishment, professionalism and the importance and impact of BTC's work. It should be free of typos and out-of-date information; the writing and images should be engaging; and navigation should be easy to follow.

Images

Images should be chosen to help tell the story(s) that are the focus of each web page. An image with high emotional impact is a higher priority than one that is a closer fit with the page's subject matter.

Developing Sales Pitches

Identify the most compelling benefits for the community, how the project fits BTC's big picture vision and builds on past achievements; and what types of images will most effectively sell the project. This information must be condensed and packaged into an effective sales pitch that will grab a viewer's attention and communicate the key points in a matter of seconds. Web content should be consistent with how BTC is selling its work in these other contexts.

Donate Button

It is standard practice for non-profit organizations to include a prominent "Donate" button in the top-level navigation throughout their websites. BTC's website includes this key feature as well as a "Donate Today" link at the bottom of every page. Regardless of any future changes to the website, the donate buttons should remain on every page.

Additionally, if BTC sends out periodic e-news, these emails should always include a "donate" link.

Proof Reading Teamwork

For important fundraising appeals such as the short paragraph on the Donate page, it is important to have a team of at least two people working on the content to ensure that there is a proofreader for all text.

Brochure

The brochure is a valuable tool for introducing and selling the organization to donors and supporters of all types. When updating the brochure, use compelling, engaging language and images, small text blocks and bullet points, etc. The brochure should convey the organization's professionalism and the importance of its work. It should provide a new contact with a snapshot of the organization that they could quickly scan to gain an understanding of BTC's most important goals and accomplishments.

Grants

Because of the key role grants have played in BTC's success, they should remain central to the organization's fundraising strategy over the next five years. Grants are particularly important because other funding sources are more likely to be limited by the community's small size and its modest economic and demographic resources.

BTC also has distinct competitive advantages over other non-profits when competing for grant funding. BTC has a compelling story that combines several key elements:

- **Success** – BTC's past success sends a powerful message to funders that investing in BTC will produce results.
- **Vision and Mission** – BTC's vision and mission are important and inspiring.
- **Opportunity for Impact** – BTC has tremendous opportunities for future accomplishments. BTC's in-town programs, as well as its public lands access work outside town all have large numbers of potential projects that are exciting and ambitious and would provide great public benefits. Most of BTC's competitors are likely based in larger communities that already have far more opportunities

for walking and biking, and access to parks and public lands. A funder can arguably have a much greater impact by giving to BTC.

- **Obvious Need** – BTC's competitors in larger communities have access to significantly greater resources. While a funder may be able to benefit a larger number of people by giving to a group in a larger community, one of those organizations is likely to find ways to fund its project regardless of whether it gets a particular grant. In comparison, BTC's need is obvious as a small organization in a rural community with limited resources. In the Dillon community, a single grant can make all the difference between whether a project succeeds or fails.
- **Uniqueness** – It is widely recognized that communities like Dillon need improved opportunities for walking and biking and access to public lands. However, most such communities do not have organizations like BTC that are successfully achieving this vision. Funders are likely to be excited to support BTC as a rare success story and a potential model for other communities.

BTC's Story

To reinforce the competitive advantages listed above, and to streamline the grant-writing process, BTC should maintain a library of text and images for each piece of its story. Each text piece should be very brief, well written and ready to plug into a grant application.

- **Past Successes** – List all past successes. In a few sentences, describe each one, including why it was important to BTC's big picture vision and any specific positive impacts and benefits. Include measurable benefits whenever possible – miles of trails, acres of land, number of bicycles recycled, etc. Also, always include at least one good image.
- **Vision and Mission** – Consider reworking the mission statement to incorporate "creating new public lands / access to public lands". This would highlight BTC's most significant accomplishment, and it is one of the most powerful and exciting messages any Montana outdoor organization can include in their mission.
- **Opportunity for Impact** – As with BTC's successes, create a short list of community needs that BTC is working to address, and for each need develop a few compelling sentences and at least one image.
- **Need and Uniqueness** – Funders want to know their money is going to have a big impact, but at the same time, they don't want local groups to become totally dependent on outside grant funding. They want to see strong local support and matching funding from the community. As a result, community need and BTC's unique grassroots strengths are themes that need to be carefully communicated by tying together two key messages:
  1) BTC is a unique, strong, inclusive and broad-based grassroots organization. We are continuing to broaden our membership and our network of supporters and partners in the community. As a result, our local fundraising is steadily improving, and this financial support from the community is helping us become sustainable for the long term. However…
  2) Grant funding is essential to our continued success because of our community's economic and demographic limitations. Grant funding makes big achievements possible, and these achievements help us continue to grow as a unique, dynamic grassroots organization.
  To help communicate these messages, it could be valuable to:

  o   Maintain tallies and lists of all the organizations and businesses that have supported BTC.

- o Maintain statistics about numbers of members, business supporters, and dollars raised locally, etc.
- o Document any positive trends such as increases in membership, local dollars raised, etc.

Grant Planning and Tracking

Grant Writers

BTC should evaluate their grant writing approach annually. Key questions to discuss could include:

- What worked well with our contract grant writer(s) on recent grant applications?
- What could have been improved in working with our contract grant writer(s) on recent grant applications?
- Do we have access to reliable and skilled grant writers for upcoming grants? If the grant writer we plan to work with on an important upcoming grant application(s) cancelled on short notice, would we have access to other grant writers who could do the job competently?
- BTC will continue to work with grant writers to prepare all large grant applications. Smaller grant applications are usually written internally using a collaboration of members, board members and employees.

Projects Lists and Budgets

Work with the program committees to keep project lists up-to-date, so that when grant opportunities arise there is always an accurate list of projects that are shovel-ready or close to shovel-ready. Developing detailed budgets for smaller "shovel ready" projects, such as trail improvements for the High Trails Phase I and II land, is important for ensuring that these projects can be quickly and easily included in grant applications.

Events

Before planning and committing to an event, BTC needs to visit these ~~five~~ four essential components:

1) **Planning** – Have clear agreement on the goals and objectives the event will be designed to accomplish, and take the time to develop a detailed written plan to accomplish those goals. The plan should include a detailed agenda with a clear timeline (the level of detail needed will vary greatly depending on the event); numbers of volunteers and leaders needed; who will be responsible for different tasks; who will speak on behalf of BTC and the key points they should cover; project factsheets, sign-up sheets, tools, food and drink, etc., that will be needed; parking logistics, etc.
2) **Marketing** – The marketing plan can be developed at the same meeting as the event plan, or in a separate meeting. It is often wise to have an initial discussion about marketing very early in the overall planning process as a reality-check for the event. If the event concept and/or the proposed timeline will not allow for adequate promotion, it probably does not make sense to proceed. Once a set of strategies has been chosen, they should be written down along with specific notes about when they need to be completed and who is responsible for each one.

3) **Evaluation** – Evaluations should include several people who were closely involved in organizing and executing the event. Ideally, the evaluation meeting should be done within a week of the event so that participants' memories are fresh.

4) **Follow-up** – Depending on the type of event, follow-up may simply consist of thanking everyone who participated and helped, and publicizing what happened. However, some events may offer opportunities for follow-up strategies that result in contributions and new memberships.

Five-Year Goals for Events

Over the next five years, it would be valuable for BTC to track the success of different types of events and continuously refine and improve its approach to events.

Repeat Events – Work to create several events of different sizes that are worth repeating every year. Seek to continuously improve these events from year to year. By the end of five years, try to have at least one event that has evolved into a productive and reliable fundraiser with a significant level of community participation. A more ambitious goal, if the group determines that it is achievable and is a good investment of resources, would be for each of BTC's four programs to develop one successful annual fundraising event by the end of five years.

New Events – Try a few new events every year. Evaluate each event to determine which ones may be worth repeating.

Approval and Planning Processes – By the end of five years, have clear and efficient processes in place for deciding whether to proceed with events, and for planning events.

Organizational Capacity and Allocation of Resources – Over the course of each year carefully evaluate how much time and resources events are requiring from staff and volunteers. Critically evaluate the costs, benefits and tradeoffs. As BTC's events calendar is refined from year to year, develop a fairly strict time-investment budget based on past years' experiences to ensure that the organization keeps its commitments manageable.

Growing Membership

Selling BTC's Work

BTC should carefully craft its local fundraising messages to highlight qualities of its work that will get people most excited to donate. Safety, fun, healthy exercise and quality of life are selling points. Additionally, BTC has an advantage over many other worthy causes because the trails and public lands it helps to create are tangible, long-term accomplishments.

Image and Perception

BTC can likely broaden its appeal through an increased emphasis on in-town projects, combined with targeted messaging, outreach and partnerships with other community organizations.

Partner Organizations

One of the most effective strategies for BTC to expand its membership may be to partner with other community organizations that have access to large numbers of people. If these organizations are willing to invite their members to joint events, guided hikes, presentations, etc. this could be a great way for interested community members to get to know BTC better. Ideally, the donations would be sent directly to BTC, allowing BTC to add the donor names to its list. Organizations with access to large numbers of people include the YMCA, and wellness programs at UMW and the Hospital.

Provide a Monthly Giving Option

Give donors the opportunity to donate on a monthly, regular basis. Work with Donor Perfect software to set up automatic withdrawals.

Add Student Membership Option and Adjust Giving Levels

BTC could consider setting its lowest membership level at $10 for students. Individual Supporting Memberships could be bumped up to $15.

Collect Information Along With Donations

BTC's hard copy and web-based donation forms could provide a key opportunity for the organization to collect important information about its donors.

"Bring them in, then move them up"

Many existing donors may be capable of increasing their giving level, and the organization should make sure they provide opportunities and encourage them to do so. BTC should periodically review its donor list to identify individuals who may be particularly good candidates for personal attention to invite them to increase their level of support. There may even be a few $10 or $20 donors who could become major donors.

Major Donors

BTC should set realistic goals for building a larger group of major donors. However, even if the potential is limited, recruiting major donors could still be a high priority strategy as this revenue could be a key source of operating funds and local match funding for grants. Major donors strategies could include:

Maintaining and Strengthening Existing Relationships – Continue to cultivate current major donors with periodic updates about projects they are interested in. Updates could be through one-on-one meetings, phone calls, emails or whatever means is the best fit with each donor. Some donors might be interested in a personal tour of current or upcoming projects.

Business Memberships

Business memberships could be particularly valuable to BTC because of the many ways local businesses could help:

- **In-Kind Donations** – Businesses are probably far more likely to make in-kind donations rather than cash donations. There are likely a great variety of opportunities for in-kind donations including food and drink for events; artwork; materials, machines and labor for trail building; or donated space for an event.
- **Marketing** – BTC may be able to partner with businesses to develop events or other outreach strategies that provide a marketing win-win for both partners. An example would be a promotion, where a business offers a discount to anyone who donates toward an exciting BTC project such as the High Trails.
- **Cash Donations** – As with individuals, businesses are probably also much more likely to donate cash to a project rather than making a general donation to become a BTC member. Businesses may value the opportunity to advertise to the community that they helped support an exciting, high profile project.

BTC should look for ways to publicly acknowledge business donors. Acknowledgement could include:

- **Window Stickers** – Businesses that make cash or in-kind donations could be given a colorful "Beaverhead Trails Coalition" window sticker to put on their storefront.
- **Member Communications** – Businesses can be thanked when BTC sends project updates to its membership.