Table of Contents

2 Fiscal Year Considerations
3 Staffing
4 Communications
5 Giving Goal by Constituent
5 Individual Engagement
6 Board Engagement
6 Corporate Engagement
7 Foundation/Nonprofit Engagement
8 Philanthropy Day
9 2019-2020 Pipeline Chart
10 Communications & Philanthropy Calendar
Fiscal Year Considerations

This is our second year of a July 1–June 30 fiscal year which should be less complex than last FY when we had a short fiscal year (Jan.–June 2018) and our first new fiscal year (July 1, 2018–June 30, 2019).

The new fiscal year now splits our Philanthropy Day fundraising into two fiscal years. This year, due to the delay in securing our speaker and a new philanthropy staff team, we’ll receive most of our Philanthropy Day revenue for 2019 as well as whatever revenue we’re able to raise next spring for Philanthropy Day 2020. We’ll need to continue to pay attention to how Philanthropy Day revenue is solicited and counted year by year.

In calendar year 2017, we described an overall goal of $314,000. There were philanthropic gifts that were not counted toward the goal when received as they were not budget relieving ($25,000 from Wells Fargo for DEI-related programming and $15,000 from the Perry Foundation for enhancing infrastructure). With these in consideration, we raised nearly $355,000 in philanthropic support in 2017.

Our overall goal for the 2018/2019 fiscal year was $394,310. Our actual donated revenue for the year was $381,050. Counting $20,000 in individual and board pledges also received and booked in FY 2018/2019, our total donated revenue was $401,050. However, $20,000 of the funds received in FY 2018/2019 were raised to cover the cost of hiring Nonprofit Finance Fund consultants. These consultants are partnering with us to refine our business model and explore new earned revenue lines to help us manage our strategic growth, which means the $20,000 raised was not budget-relieving.

For the FY 2019/2020 fiscal year here are some key considerations:

- We’ve completed our second, two-year, $35,000/year Grant Foundation round of funding and won’t be eligible to reapply for three years.
- We’ll likely be in our final year of the CFA Institute partnership which has brought in approximately $100,000 donated revenue (in the NP/Foundation/Government category) for each of the past 3 years.
- We will complete our NFF Investor Case for Support work out of which we expect to recommend a major donor/foundation campaign to seek bridge (1-3 year) funding to grow organizational capacity so that we can provide additional earned revenue service lines to enhance our mission and our bottom line.
- Most of our major donors have given to CNE for a number of years – how do we best continue to steward them so they stay with us as we continue to evolve as an organization?
- Two key major donors will be rotating off the CNE board in December and their support will likely diminish. Two of our new board member class are philanthropy practitioners. How can we actively engage board members old and new in supporting all aspects of this philanthropy plan?
- Another key consideration is the size of CNE – exceeding $1 million due to strategic partnerships with funders across the state – and local donor and member perceptions around that growth. There is a continuing need to articulate how the regional partnerships are funded, and the value they bring to the Charlottesville region.
- There continues to be a lot of attention – including from some of our key donors – to issues of diversity, equity, and inclusion and how CNE is responding – both as something garnering attention nationally, and also with the considerations around how Summer 2017 impacted our local community and the nonprofits we serve.
Staffing

Following the departure of our Director of Philanthropy, Sarah Gaines, we decided to restructure and create two new positions: a Deputy Director of Operations and Advancement and a Senior Manager of Philanthropy and Communications. Our new philanthropy team now consists of four staff members, two of whom were hired at the first of the year, and one of whom was hired in May. We are still working out how this team will best function, but following is a guide:

<table>
<thead>
<tr>
<th>TITLE</th>
<th>Executive Director</th>
<th>Deputy Director of Operations &amp; Advancement</th>
<th>Senior Manager of Philanthropy &amp; Communications</th>
<th>Administrative Coordinator</th>
</tr>
</thead>
<tbody>
<tr>
<td>NAME</td>
<td>Cristine Nardi</td>
<td>Ryan Jacoby</td>
<td>Aleen Carey</td>
<td>Ian Coppage</td>
</tr>
<tr>
<td>AREAS OF RESPONSIBILITY</td>
<td>Philanthropy &amp; communications strategist</td>
<td>Develops philanthropy &amp; communications plans &amp; manages plans + calendars</td>
<td>Manages PDAY Host Committee, sponsorships &amp; event planning</td>
<td>Develops &amp; manages philanthropy systems, including Bloomerang, our donor management software</td>
</tr>
<tr>
<td></td>
<td>Institutional history</td>
<td>Tracks philanthropy #'s and manages pipeline</td>
<td>Staff liaison to Philanthropy Advisors</td>
<td>Thank you notes, donor e-newsletter updates</td>
</tr>
<tr>
<td></td>
<td>Major donor relationship manager</td>
<td>Project manager for annual impact reports</td>
<td>Stewards corporate partners</td>
<td>Pipeline maintenance</td>
</tr>
<tr>
<td></td>
<td>Quality control</td>
<td>Manages foundation grants</td>
<td>Community ambassador for CNE</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Manages Administrative Coordinator &amp; Senior Manager</td>
<td>Executes communications plan</td>
<td></td>
</tr>
</tbody>
</table>

NOTE that with this structure we don't have any one person managing philanthropy or focusing only on philanthropy. We consider this a short-term solution. Ideally, we'd be able to hire a Director of Philanthropy to provide more dedicated support and round out our philanthropy team.
Communications

Telling our story well and to a variety of constituents is an important part of building the success of the organization and our philanthropic efforts. To that end, here are the communications tools we use:

**Newsletter:** Sent weekly and a valuable community resource. Aleen serves as point for content preparation. Goal: continue to provide strong community content with targeted use around Philanthropy Day and other strategic initiatives. Our Program Manager, Andrew Robinson, additionally oversees a weekly program blast, the content for which he manages.

**Impact Report:** We created a one-page spring Impact Update that we included in our end of FY 2018/2019 fiscal year ask to LYBUNT/SYBUNT donors and have been sharing with our current donors over the past few months. Spearheaded by Ryan, we will develop our FY 2018/2019 full impact report to be distributed this fall in concert with Philanthropy Day 2019, and will aim to complete a new Impact Report each year by October 1st.

**Programmatic Offerings:** In 2019, our nonprofit survey included requests for services that we already provide! We recognize the opportunity to enhance communication around our programmatic offerings to ensure that the sector has maximum awareness of upcoming opportunities.

**Video:** The continued use and development of video content is under consideration. CNE was able to utilize the relationship with CFA Institute to develop a Finance Academy video in early 2018. Additional opportunities to partner and to develop video stories with media partners should be explored whenever time and capacity allow.

**Media:** We will use opportunities like WNRN’s “Hear Together” and Newsplex’s “Community Counts” to broaden the community’s awareness of CNE and the full scope of membership. We will additionally build our role as an expert resource on nonprofit issues for the media – offering additional stories about our programming as well as commentary on public events. We will maintain our relationship with Albemarle Magazine and other media, including Cville Weekly.

We are in the process of developing a separate Communications Plan for FY 2019/2020.
Giving Goals by Constituent

The FY 2019/2020 goals below are ambitious but based on past donor history.

<table>
<thead>
<tr>
<th></th>
<th>18-19 Budget</th>
<th>18-19 Actual</th>
<th>19-20 Budget</th>
<th>% Change *</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual</td>
<td>145,000</td>
<td>151,720</td>
<td>191,115**</td>
<td>26%</td>
</tr>
<tr>
<td>Board</td>
<td>59,000</td>
<td>45,984</td>
<td>36,800</td>
<td>-20%</td>
</tr>
<tr>
<td>Corporate</td>
<td>55,000</td>
<td>25,607</td>
<td>71,300***</td>
<td>278%</td>
</tr>
<tr>
<td>Foundation</td>
<td>28,000</td>
<td>38,387</td>
<td>33,275</td>
<td>-13%</td>
</tr>
<tr>
<td>NPs/ Gov.</td>
<td>107,310</td>
<td>117,907</td>
<td>112,310</td>
<td>-5%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>394,310</td>
<td>379,605</td>
<td>448,000</td>
<td>117%</td>
</tr>
</tbody>
</table>

*Percentage change between FY 2018/2019 Actuals and FY 2019/2020 Budget

**This total includes (1) an additional $15,000 projected raise to cover the last invoice for our NFF case for support and (2) a majority of PDAY 2019 sponsorships coming in later than normal due to when we secured our speaker.

***This total reflects (1) delayed recruitment of corporate PDAY sponsorships due to when we secured our speaker, (2) $5,000 for ancillary PDAY programming, and (3) revamped Corporate Partner program.

Individual Engagement

In 2017, the Individual Giving Goal was $172,500 and $199,260 was raised. In FY 2018-19, the Individual Giving Goal was $145,000, and $150,745 was raised.

Individual giving represents our largest opportunity for support – both in building a more robust ongoing annual fund program of donors in the $1,000-$5,000 range, and also in approaching major donors for transformational giving as we bridge our growth. Increased emphasis on regular and varied communication and expanded strategic solicitations will help build the $1,000 to $5,000 donors.

This will continue to require full board participation – both in personal giving and in engaging community members. The ongoing goal of growing the CNE board will impact this goal and represents an opportunity. CNE will need to engage at least one (but likely more than one) new donor to fund CNE at the $10,000 or above level to replace some of the funding we have lost from key major donors since 2017. The development of an Investor Case for Support is a major variable and two financial goals reflect this variance.
Goals for Individual Engagement for 2019/2020:

- Financial: Without Investors in our Case for Support, $191,615 which includes an additional $15K raise to cover phase II of our Nonprofit Finance Fund strategic growth project. With development of the Investor Case and robust outreach and engagement: $220,000 to $300,000.
- Engagement: One new or significantly increased donor at the $10,000 or above level. At least 5 new donors at the $1,000 level and above.

**Board Engagement**

In FY 2018/2019, the Board Giving Goal was $59,000 and $45,984 was raised, $10,000 of which was for the NFF project so not budget-relieving.

Goals around Board Engagement for FY 2019/2020:

- Financial: $36,800. This represents a slight reduction in the board giving goal that tracks actual unrestricted board giving in the 2018/19 fiscal year, and anticipates a loss of two major donors on the board.
- Engagement: 100% participation. CNE historically has no difficulty achieving this goal. Every board member philanthropically supports CNE with a personal and meaningful gift.
- The philanthropy team, with support from the Philanthropy Advisors, will continue to try to engage each board member on a one on one basis to best utilize their connections and willingness to engage philanthropic support from the broader community.

**Corporate Engagement**

In FY 2018/2019, the Corporate Giving Goal was $55,000. We raised only $25,000 towards that goal due primarily to the fact that we were delayed in spring sponsorship outreach for Philanthropy Day because it took a while this year to secure our Philanthropy Day speaker.

At this year’s annual board retreat, we reviewed the evolution of our Corporate Partner program and took up the strategic question of how to more fully engage the corporate community in the work of CNE. From that retreat, we formed a working group to re-envision our Corporate Partner program. The working group established two goals: 1) to reframe the program to include all of our corporate partner relationships and update the benefits of membership; and 2) to explore how best to make the case for a CNE role in regional economic development. We expect to have recommendations for revising the program in August, and anticipate reaching out to lead economic development staffers at UVA, the City and County, and Central Virginia Partnership for Economic Development in early September after we've created our economic development pitch.

Key considerations around corporate engagement include:

- Successful administration of the program, depending on the level, can demand more staff time than stewarding an individual gift.

- CNE board member Carolyn Burnett has identified a desire to help cultivate developing professionals; people who are early- or mid-career, for active community engagement with CNE as a resource. To kick-off the initiative, we hosted a panel in 2018 at CNE on Developing Leadership Skills via Nonprofit Service. Stay tuned for more developments in this area now that Carolyn is back from maternity leave.
Goals for Corporate Engagement for 2019/2020:

- Financial: $71,300
- To include sponsorship for PDAY 2019 and some for PDAY 2020 as well. And additional $5K projected income included that we’d raise to defray expenses should we host additional PDAY-related programming.
- Engagement: Welcome 5 new corporate partners in the course of FY 2019/2020 at the $1,000 or higher level.
- Action: Focus on reintroducing the Corporate Partner program; supporting more Developing Professionals engagement; and facilitating follow up with corporate participants from the corporate benchmarking conversations that CNE hosted in June 2018 as part of the Finance Academy and in partnership with CFA and Wells Fargo.

Foundation and Nonprofit Engagement

This section combines foundation and nonprofit giving (we don’t currently receive any government funding). Nonprofits and foundations that support Philanthropy Day (such as UVA Advancement, STAB, PVCC, CACF, and PATH) are included in this goal and amount raised. Also included are general operating and programmatic grants from foundations. Our annual grant from CFA Institute to fund the Finance Academy shows up in this category as well. This will likely be the final year of the CFA Institute grant.

In FY 2018/2019, we had a goal of $28,000 for philanthropic support from foundations, not including the $32,000 Grant Foundation pledge booked in 2017. We realized $38,387 in gifts due to an unexpected December 2018 grant from the Perry Foundation. We had a goal of $7,000 from nonprofits, excluding CFA Institute, and we received approximately $10,500.

Goals for Foundation/Nonprofit Engagement for FY 2019/2020 track actuals for FY 2018/2019:

- Financial: $145,585. Excluding the $107,000 to be received by CFA Institute which is for the Finance Academy, this is a combined goal of $38,585. $5,000 projected from nonprofits, and $33,000 from foundations. This breaks down into $10K from foundations for general operating support (Wells Fargo, Bama Works, Perry, and potential new) and $28K for PDAY.
- Engagement: To develop one new funding relationship at the $10-20,000 or above range, and ideally as a multi-year gift. We are in early stage discussion about a potential collaborative funding relationship with United Way. (Which could represent the “new” funding goal!)

There continues to be a special opportunity to garner foundational interest in CNE efforts related to diversity, equity and inclusion based on the national profile Charlottesville realized as a result of the events of August 11 and 12.
Philanthropy Day FY 2019/2020

Philanthropy Day, CNE’s community celebration of giving and only annual fundraiser, is a cornerstone of CNE’s fundraising, community building, and branding efforts. The goal for any Philanthropy Day is to celebrate and honor the importance of this event – utilizing it to engage volunteers, provide opportunities for cultivation and engagement, raise money, and invite community participation.

Building off last year’s very successful event, this year our top priority will still be to achieve our fundraising goal while ensuring that we have a diverse and inclusive celebration. We will offer fewer tables for sponsorship so as to have additional tables available for ticket sales and to facilitate diversifying the celebration. The budget goals, including historical goals and the number of sponsorship tables made available, are:

<table>
<thead>
<tr>
<th>Philanthropy Day Sponsorship Levels &amp; Quantities</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>$10,000</td>
</tr>
<tr>
<td>$5,000</td>
</tr>
<tr>
<td>$2,500</td>
</tr>
<tr>
<td>$1,500</td>
</tr>
<tr>
<td>Total Amount Raised</td>
</tr>
<tr>
<td>Total # of Tables Sponsored</td>
</tr>
</tbody>
</table>

Planning for Philanthropy Day 2019 begins early in the year, and donations for the event will always span fiscal years.
FY 2019-2020 Pipeline Chart as of July 1, 2019

Summary

REV 7.29.19

CNE Pipeline Metrics FY 2019-2020

<table>
<thead>
<tr>
<th></th>
<th>Goal</th>
<th>Weighted</th>
<th>10%</th>
<th>45%</th>
<th>05%</th>
<th>100%</th>
<th>Pledge</th>
<th>% to goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate</td>
<td>$71,300 0.00</td>
<td>$58,075.00</td>
<td>$3.59/0.00</td>
<td>#/##</td>
<td>$40,800.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>0.00%</td>
</tr>
<tr>
<td>Foundation</td>
<td>$33,275.00</td>
<td>$33,210.00</td>
<td>$1.70/0.00</td>
<td>$7,050.00</td>
<td>$23,800.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>0.00%</td>
</tr>
<tr>
<td>Individual</td>
<td>$101,125.00</td>
<td>$161,383.00</td>
<td>$5.83/0.00</td>
<td>$5,393.00</td>
<td>$152,175.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>0.00%</td>
</tr>
<tr>
<td>Board</td>
<td>$36,600.00</td>
<td>$33,110.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$33,110.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>0.00%</td>
</tr>
<tr>
<td>Organization</td>
<td>$112,310.00</td>
<td>$91,205.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$91,205.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>0.00%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$444,850.00</td>
<td>$376,933.00</td>
<td>#/##</td>
<td>#/##</td>
<td>$339,090.50</td>
<td>$5.00</td>
<td>$0.30</td>
<td>0.00%</td>
</tr>
</tbody>
</table>

---

*Pledge amounts are reflected within the total weighted amounts as "funds received" (or 100%).

**Pledge amounts are NOT reflected within "% to goal".*