



Development Plan

2017-2020



2017-2020 Development Plan

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Summary and 2017-2020 Development Action Plan

The Coalition is supported by memberships, donations and grants from the DentaQuest Foundation, Missouri Foundation for Health, Health Care Foundation of Greater Kansas City, and the Missouri Department of Health and Senior Services. The Oral Health Policy Conference held by the Coalition may provide some operational funds.

Funds are also raised through membership fees and from donations/investments. Coalition membership is included in the conference registration fee.

For purposes of discussion in the Summary and 2017-2020 Development Action Plan:

A “member” is an individual or organization who has paid for an annual membership in the Coalition.

An “investor” is an individual or organization who has made a monetary investment in the Coalition through a donation. An investor automatically becomes a member of the Coalition.

- I. Prospect List Development
 - A. Build, maintain, and update prospect list of potential new members and investors.
 - B. Board members will identify prospective investors and make contacts.
 - C. Prospects will be contacted via the appeals outlined in Sections IIA and IIB.
- II. Appeals
 - A. Membership Appeals: To increase membership, prospective members, including non-renewing past members and individuals and organizations identified by the Coalition as potential members, will be contacted by e-mail and/or letter.
 1. Following the conference, a mailing will be done to past members who have not renewed by registering for the conference. Follow-up mailings will be done as needed.
 2. A membership appeal will take place in August of each year (2017-2020), in conjunction with the Missouri Oral Health Awareness month.
 3. Membership appeals will occur repeatedly each year (2017-2020) from December through early March and again each year in December, in conjunction with promotion of conference registration.



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4. In addition to a letter of thanks and welcome signed by the Executive Director, new members will be given an overview of the Coalition, a primer on being an effective advocate for oral health policy change, and a listing of policy goals and priorities. Members will be encouraged to participate in committees.
 - B. Investor Appeal: Prospective investors, including previous and potential investors identified by the Coalition, will be contacted in November and in May of each year (2017-2020).
 - C. Sponsors and exhibitors at previous oral health policy conferences will be contacted to become sponsors and exhibitors for the 2017, 2018, 2019 and 2020 conferences. Follow-up contacts will be made for those who have yet to secure their conference participation.
- III. Member and Investor Stewardship: Maintain prompt turnaround (within 2 weeks of gift receipt) of thank you letters signed by the Executive Director.
- IV. Member and Investor Cultivation
- A. Member and Investor Cultivation Events for new prospects: Will use promotion of oral health policy conference to solicit new members and investors.
 - B. Member and Investor Cultivation Events for current members and investors: The Coalition will encourage active participation by members through measures that can include the following or other measures deemed appropriate:
 1. Encouraging member attendance at Board meetings and oral health policy conference.
 2. Sharing information on activities of member organizations.
 3. Encouraging attendance by Coalition members of local meetings in regard to community water fluoridation.
 4. Suggesting letters to governor and legislators.
 5. Training regarding communicating with legislators.
- V. Board Giving: 100% board involvement through investments or other forms. Our goal is to achieve 100% participation in giving beyond annual membership and conference attendance.
- VI. Database: Maintain and update customized database of present and past members and investors, which includes
- A. Name
 - B. Title
 - C. Organizational affiliation
 - D. E-mail address
 - E. Mailing address
 - F. Phone number(s)
 - G. Date of payment
 - H. Date(s) of correspondence



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- VII. Mailing Lists: Maintain and update customized mailing lists for
 - A. Membership and investment appeals
 - B. Member and investor correspondence
- VIII. Special Events
 - A. The Oral Health Legislative Awareness Event will be held in conjunction with the Missouri Oral Health Policy Conference and will include advocacy training.
 - B. Missouri Oral Health Policy Conference
 - 1. Continue to grow attendance.
 - 2. Funds will be raised through registration fees, sponsorships, and exhibitor fees.
 - 3. Conference registration will be promoted through multiple vehicles, including
 - a. *The Coalition Blast*
 - b. social media including Facebook and Twitter
 - c. multiple e-mailings to membership, and
 - d. targeting members and partners through information-sharing.
- IX. Grants
 - A. Maintain current funding levels.
 - B. Identify potential new funding sources.
 - C. Submit grant proposals for opportunities that support Coalition mission.
- X. Public Relations
 - A. e-Newsletter
 - 1. Send out *The Coalition Blast!* at least 6 times per year to all members.
 - 2. Upcoming Meetings
 - 3. Upcoming Advocacy Webinars Hosted by the Coalition
 - 4. News from the Coalition
 - 5. Oral Health and Related News
 - 6. Upcoming Conferences and Workshops
 - 7. Coalition Partners
 - B. Website: Use sections Coalition website homepage to solicit memberships and investments.
 - 1. "Join Our Efforts"
 - 2. "Invest"
 - 3. Post recordings of advocacy webinars and resources hosted by the Coalition in "Resources" section
 - C. Conference Registration prior to conference date.
 - D. Distribute the Greater St. Louis Dental Hygienists' Association Consumer Scholarship application prior to conference date.
 - E. External Publications: Utilize partnerships to promote the Coalition, via sharing written materials
 - 1. News releases
 - 2. Articles from the website's "News" section
 - 3. Share with members and partners, including organizations such as
 - a. the Missouri Dental Association,



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- b. the Missouri Dental Hygienists' Association,
- c. the Missouri Primary Care Association,
- d. dental schools,
- e. state agencies,
- f. local public health,
- g. and other entities.
- F. Community Outreach Presentations: Provide education about the Coalition at venues such as
 - 1. the MDHA conference,
 - 2. public health conferences, and
 - 3. the National Oral Health Conference.
- G. Media: Contact local media to announce grants, press releases, new board members, and special events.
- H. Social Media:
 - 1. Use Facebook and Twitter to share news and the Coalition's message.
 - 2. Consider the use of other social media.

Report of 2016-2017 Development Action Plan

- I. Prospect List Development
 - A. List serve of new members and investors is developed and maintained including but not limited to the Missouri Departments of Mental Health and Health and Senior Services, and federally qualified health centers.
 - B. New investors are identified and contacted.
 - C. Prospects are contacted via appeal efforts.
- II. Appeals
 - A. Membership Appeals are executed as prescribed in the Development Action Plan.
 - B. Investor Appeals are executed as prescribed in the Development Action Plan.
 - C. Past conference sponsors and exhibitors are contacted to participate annually.
- III. Prompt turnaround for donations is maintained
- IV. Member and Investor Cultivation
 - A. Conference is promoted to solicit new members and investors.
 - B. Members are encouraged to actively participate in Coalition meetings, the conference, local meetings pertaining to community water fluoridation efforts, and advocacy trainings/webinars.
- V. Board giving is promoted and encouraged.
- VI. Customized database of present and past members and investors is maintained.
- VII. Mailing Lists
 - A. Mailing lists of membership and investment appeals is maintained.
 - B. Mailing lists of member and investor correspondence is maintained.
- VIII. Special Events
 - A. The Oral Health Legislative Awareness Event is held in conjunction with the conference each year and advocacy training is provided.
 - B. Attendance at the 2017 conference was consistent with 2016. Fees are raised which exceed the cost of the conference. Conference promotion occurs via multiple vehicles as prescribed in the Development Action Plan.



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IX. Grants

- A. Current funding levels maintained.
- B. New funding sources are identified.
- C. Grant/funding proposals were submitted to DentaQuest Foundation, Missouri Department of Health and Senior Services, Health Care Foundation of Greater Kansas City, and Missouri Foundation for Health. All four grants/funding proposals were approved and executed.

X. Public Relations

- A. *The Coalition Blast!* is sent to all members multiple times each year.
- B. Sections of website as prescribed in the Development Action Plan are utilized to solicit memberships and investments.
- C. Conference registration is promoted prior to conference date.
- D. Coalition materials and events are distributed by partners and members.
- E. Coalition information is exhibited at partners' conferences and the National Oral Health Conference.
- F. Media contacts are made to announce grants, press releases, new board members and special events.
- G. Social media is utilized to share Coalition news, messages and events regularly.



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Organization Introduction

The Mission of the Missouri Coalition for Oral Health (MCOH) is to improve oral health for all Missourians through sound public policy and public awareness. MCOH is supported by the Missouri Foundation for Health, the Health Care Foundation of Greater Kansas City and the REACH Healthcare Foundation. The Coalition was reorganized in 2011 to support strategic work on policy related to oral health. In 2014, the board voted to establish a development committee in an effort to meet the goal of the Coalition which is to attract and retain funding to support the Mission and Vision over the long-term. The development committee is made up of three members: the Executive Director who oversees the day to day operations, fundraising, marketing, grant writing, program evaluation, and public relations activities for the agency; an active board member who chairs the committee, currently the development committee chair is Shannon Woodcock, Executive Director of the Delta Dental Health Theatre; and committee member Jami Vandevort who is an RDH with Live Well Community Health Center in Waverly, MO.

Missouri Coalition for Oral Health is operating on an annual budget of \$202,000. Our 2015-2016 goals include: attract and retain funding; increase annual memberships, create and expand donor opportunities, and increase attendance to the Missouri Oral Health Policy Conference.

Donor is identified as any individual who contributes monetarily to MCOH whether by donation, event registration/sponsorship, or membership.



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Current Status

Strengths:

- MCOH has strong grant funding
- Missouri Oral Health Policy Conference was well received in its inaugural year and has great potential for continued growth and fundraising.

Weaknesses:

- There are currently minimal donations and no mandatory board contributions established.
- Planned giving program needs to be established and activity needs to be conducted throughout the year.
- Limited staff and staff time to accomplish events, grant writing, personal visits, etc needs to be very strategic.

Opportunities:

- The organization is in the process of creating a functioning Development Committee with a specific charge.
- MCOH recognizes the need for fund diversity and is actively working towards a diverse funding structure.
- MCOH is a relatively new organization and has a great opportunity to engage new members and donors.

Threats:

- MCOH lacks a donor database.
- MCOH board, although committed to the organization, are not a fundraising board and need to diversify as well as attract fundraisers to the development committee.
- Top three sources of funding are nearing the end of their commitment.

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Recommendations

MCOH has identified Shannon Woodcock as the development committee chair. Fundraising members must be recruited to the development committee. The committee will research funding opportunities to expand the grant prospect list and that research will be conducted on-going. The Executive Director should continue to research matching appropriate grant funders with appropriate grant requests. MCOH should consider hiring a part time grant writer to assist with proposal submissions.

Purchase and utilize a donor database It would greatly benefit MCOH to research and purchase a donor database suitable to track donor information, organize appeals, and with sufficient data mining capabilities.

Establish a defined mailing list for appeals MCOH needs to establish a defined mailing list with parameters within the capabilities of our current database. Then MCOH will begin researching current donors, then lapsed, then prospects and research the possibility of conducting an age overlay of our database to help us set more personalized defined parameters to make our mailing list stronger and more successful.

Increase mail appeals Currently Missouri Coalition for Oral Health conducts one year end mail appeal per year. MCOH should consider increasing that that number to two mail appeals. These appeals can be strategically placed during oral health awareness months (Feb, Aug, Oct) . The appeal will focus on raising awareness of the coalition's mission, policy, and awareness efforts. Research has proven that the more times you connect with individuals, the response rate

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and amount of donations increase. These appeals will also join a save the date conference mailing, thank you cards to donors, and membership donation opportunity.

Establish 100% board giving It is crucial to obtain 100% board giving. This is important because many donors, most foundations, and almost every major philanthropist will want to know that your board is fully invested in your mission before they themselves make a donation.

Increase Membership (Membership committee)

Utilize 3rd party fundraisers- Fundraising platforms such as Amazon Smile, eScript (Schnucks), dine out for a cause, etc. can be very successful especially for small organizations with larger donor reach.

Create a vendor prospect list- All dental product companies should be identified as a potential corporate sponsor. MCOH should reach out to current sponsors and ask about benefits.

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Additional Potential Future Development Goals

Individual Annual Giving

I. Appeals

- A. Regular Donor Appeals: MCOH has typically conducted a year end appeal that is mailed each year to the entire Coalition contact list totaling approximately 250 people. This year we will be implementing the appeal schedule below.
 - 1. In February MCOH will mail program enhancement piece. Tie in with Children's dental health month and include legislation information.
 - 2. The year-end/Fall appeal will be mailed around the end of October. This will include a 4 tier mailing process. The first tier (donors who have made a gift in the last 3 months) will receive a holiday card, the second tier (donors who have given in 2014 but not in the last 3 months) will receive a very polite letter letting them know what another gift this year will help us accomplish, the third tier (to donors who have not yet given this year but may be a lybunt (donor who gave precious year but not yet this year) or a sybunt (donor who gave in a previous year but not yet this year or last year)) will receive a year end solicitation, and the fourth and final tier will be similar to the third tier but will be sent to individuals who have no giving record with our organization.
- B. Major Donor Appeal: Major donor prospects will be mailed a special appeal letter asking for a larger gift than the regular donor or family appeal. Major donors will also receive a phone call from the Executive Director asking for a year-end gift.

- II. Prospect List Development: Build, maintain, and update prospect list of potential new donors. All board members should review list to identify prospects they already have an established relationship with.

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- III. Donor Stewardship: Maintain prompt turnaround (within 2 weeks of gift receipt) of thank you notes signed by the ED.
 - A. Board Members: 2-4 board members will make monthly “Thank you” calls for gifts received of \$250 and over in a given month. (Need to appoint members to do this and create a short thank you script)
 - B. Executive Director: Thank \$100+ donors year-round.
 - C. Dental Educators and Volunteers: Handle smaller donations including Annual Giving and “Thank you” calls and letters for donations below \$1 or more.
 - D. Potentially add in Year End thank you with accomplishments.
- IV. Donor Cultivation
 - A Donor Cultivation Events for new prospects: Annual conference is a good example.
 - B. Donor Cultivation Events for current donors: Lobbying to grassroots. Sending a letter for example to the governor and requesting other do the same. Inviting people to a rally for fluoridation, etc. Board meetings are open to members and training around how to talk to a legislator.
 - C. Utilize Moves Management for 2015
Action Plan
 - 1. Identify top 10 and 25 prospects within 90 days of plan approval by board
 - 2. Review list with select board members
 - 3. Research prospects
 - 4. Identify natural partners
 - 5. Plan moves
 - 6. Continue discovery process with prospects who may not be top prospects
 - 7. Continuously record and update moves and plan in donor database
 - D. Donor Cultivation:
Action Plan
 - 1. Develop high priority list of major donors that Executive Director
 - 2. Send out VIP letters 1-2 times per year to major donors.
 - 3. Deliver holiday “gift” to sponsors and major donors if desired. (Ex. Pen)
- V. Board Giving: Develop plan to coordinate giving by board members. There must be 100% board giving. (Optional for representative of the State of Missouri)

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VI. Annual Giving Club/ Donor Board

- A. Set goals for Annual Giving Club with assistance of Board Members/ Finance & development Committees.
- B. Place articles about Annual Giving in newsletters
- C. Report # of new donors/renewals at every board meeting.

VII. Database

- A. Purchase donor software (ED and development committee can research)
- B. Add past and current donors to database
- C. Record all donations in software and utilize for yearend tiered giving.

VIII. Mailing List- Establish a defined mailing list and increase mail appeals.

- A. Analyze responses from 2014 year end appeal by the last day of May-.

Responsibility: ED

Action Plan

- 1. Have staff run lists of responses.
- 2. Track year-end appeal response rate and amount contributed of:
 - a. Lapsed donors
 - b. Current donors
 - c. Board members

- B. Analyze giving history of appeal donors from 2014 – 2015 by December 1st, 2015.

Responsibility: ED

Action Plan

- 1. Run list of appeal donors from 2014 – 2015
- 2. Identify the following donor segments
 - a. Current donors
 - b. Lapsed donors - lapsed one year, two years, three years or longer
 - c. Board members
 - d. Donors who have given annually for 3+ years
- 3. Identify giving patterns among the segments.

- C. Mail an additional mail appeal to generate \$2,000 by February 2016. Responsibility: MCOH Staff. Possibly tie into children's oral health month. What will the funds be used for?

Action Plan

- 1. Finalize the creative execution by January 5th, 2016.
- 2. Finalize the mailing list and segments by January 5th, 2016.

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3. Produce the mail appeal by January 15th, 2016.
 - a. Have appeal printed or designed for email by Feb 1st, 2016.
 - b. Prepare the mailing by February 5th, 2016.
 - c. Mail on February 9th, 2016.
4. Conduct all follow-up calls the week of Feb 23rd, 2016.
 - a. Record all gifts.
 - b. Send acknowledgements to donors within five working days.
 - c. Analyze mailing response.
 - d. Develop recommendations for 2017.

- D. Identify additional prospects through local organizations
- E. Establish prospect list and solicitors.
- F. Solicit prospects.

- IX. Gift Acceptance Policy: Design by December 2015. To guide activities of fundraising staff and volunteers.

Special Events

- I. Missouri Oral Health Policy Conference: Continue to grow and increase attendance. (Conference Committee)
- II. Advocacy Training/Legislative Awareness- in conjunction with the conference.

Grants

Increase grant requests and in turn grant revenue.

- I. Conduct grant research to identify 3 grant funding prospects by January 1st, 2016.
Responsibility: Executive Director (ED), grant writer, development committee.

Action Plan

1. Identify current needs for support by brainstorming with Executive Director and board members.
 - a. Document "Need".
 - b. Get approval from Board of Directors.
2. Identify an initial list of 3 prospective grant funders by November 1st, 2015
 - a. Use on-line Foundation Finder and other resources to identify possible matches.

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- II. Conduct additional research to identify 2 new grant funders to submit proposals to by March 31, 2016. Responsibility: ED

Action Plan

1. Visit grant funder websites for current guidelines and applications.
2. If websites are not available, then request guidelines/application from grant funders.
3. Determine from information received if grant funders are still a prospect.

- III. Identify grant requests and submittal dates by January 1st, 2016. Responsibility: ED

Action Plan

1. Based on information received, determine best possible grant requests.
2. Contact the grant funders to discuss possible grant request.
3. Finalize the grant request for each funder.
4. Develop a 2016 grant submittal calendar.

Public Relations

- I. e-Newsletter: This is our main communication piece with constituents. Send out monthly to approximately 130 emails. Includes articles on:
- ✓ Current Events
 - ✓ Upcoming Meetings
 - ✓ Oral Health and Related News
 - ✓ Upcoming Conferences and Workshops
 - ✓ Coalition Partners
- II. Website: Needs constant review of copy. Opportunities around committee postings.
- III. Publications: Do we have any articles we publish in monthly bulletins, papers, etc? What publications can MCOH advertise or put an article in such as ADA, MDA, GSLDS, etc? Create partnerships to provide ongoing promotion.
- IV. Community Outreach Presentations: Provide education across Missouri about initiatives regarding oral health. (Membership committee) Head Start, MOMOM, MDHA Winter Session.
- V. Promotional Materials: Develop an annual report for 2014...What have we accomplished.

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- VI. Media: Contact local media to announce grants, press releases, new board members, and special events.
- VII. Social Media: Create larger social media presence through Facebook, LinkedIn, and Twitter. Look at possible intern to develop messages.

Memberships

- I. (Membership Committee)
- II. Add a donation option to every membership application

Coalition Sponsors

- I. Continue to recruit new sponsorships.
- II. Cultivate and maintain current sponsor relationships
- III. Use Sponsors as volunteers for events.
- IV. Establish payroll deduction or volunteer program for employees of business sponsors.

Grants/Foundations

- I. Grants: Maintain current funding levels (\$175,000+ annually) by maintaining strong relationships. Call contacts regularly to keep current on the focus of each foundation, which MCOH initiatives are most appropriate for each foundation, and appropriate funding request levels.
- II. New Foundations: Continually investigate new corporations and foundations to apply for grants. Prospects include: Deaconess, Proctor and Gamble, and ACT, etc.
- III. Talk to other coalitions about possible collaborative efforts and available grant opportunities.

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Conclusion

Missouri Coalition for Oral Health, (MCOH) is an established organization with a good reputation. Even though the fundraising efforts are still relatively new to the organization, the strides we have made are impressive. The recommendations in this plan are to help us build on what has been done and continue to help us grow and diversify our contributed income.

Increasing grant revenue by increasing the grant requests submitted is a good way to secure funding for one-time or short-term needs while building new relationships. MCOH has been sending mail appeals for the past three years; the things we have not been doing with mail appeals is segmenting our mailing lists, analyzing the results, and establishing our mailing list by parameters. The donor database will make data mining and segmenting mailings possible. Also, increasing the number of mailings will increase the response rate and amount of donations.

MCOH is blessed with actively involved Board Members who are expected to participate in the annual conference. Our goal is to also create a culture of giving in which donations outside of annual membership/conference attendance will reach 100% participation from board members. As the organization continues to grow it is valuable to be able to say with confidence and accuracy that 100% of the board members made an individual contribution to the coalition.

By growing our community education and awareness activities we will be able to introduce the Coalition to larger numbers of individuals and establish a prospect pool of future volunteers and donors. Also by putting in place strategic efforts we will be greatly increasing the awareness of the Coalition. If the development committee and staff of MCOH are able to

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accomplish all the stated goals, they will assist the agency in raising awareness, becoming more financially sound, and will build relationships that are mutually beneficial for years to come.

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