

BOARD DEVELOPMENT COMMITTEE

KEY TAKEAWAYS

- Board input into the development plan- there is a section for board strategy
- Need a co-chair for development team to ensure we have a succession plan
- Fall Appeal went out on October 29th. We would like the development committee to follow up with thank yous to those that donate between now and December 31st. We will provide talking points, thank you cards with stamps and phone numbers for board members to thank donors that gave over 100.00 during this campaign. Stay tuned. Packages will be sent to your home address.

PLEASE NOTE that this is a DRAFT that the development team pulled together in October. It is a DRAFT. Please disregard grammar, spelling but more focus on content and strategy.

DRAFT
Revenue Development Plan
2021-2024

Executive Summary

Hartford Area Habitat for Humanity (HAHfH) is part of a global, nonprofit housing organization operated on Christian principles that seeks to put God's love into action by building homes, communities, and hope. HAHfH is dedicated to eliminating substandard housing locally and worldwide through constructing, rehabilitating, and preserving homes; by advocating for fair and just housing policies; and by providing training and access to resources to help families improve their shelter conditions. Habitat for Humanity was founded on the conviction that every man, woman and child should have a simple, durable place to live in dignity and safety, and that decent shelter in decent communities should be a matter of conscience and action for all. This Revenue Development Plan is a collaborative effort of selected board members and staff that has formed an Impact Team. We have the ability to serve the community and achieve the organization's vision by successfully implementing this plan.

Covid-19

Even before the COVID-19 pandemic hit, the U.S. was facing extreme housing challenges. For decades, stagnant wages combined with insufficient supply to meet demand have pushed the cost of owning a home out of reach for millions of families. Now, with hours, wages and jobs cut as a result of the coronavirus, even more individuals are facing housing instability at a time when one's ability to be safely and affordably housed is integral to the health and safety of us all. HAHfH is in alignment with CDC guidelines for our construction, office and ReStore environments as we move forward and recover from this pandemic.

The Vision and Message

The organization will be financially stable and viable, with a more diversified funding stream. New sources of funding and earned income will make it possible for HAHfH to invest appropriately in its employees and infrastructure, so that the unique and critically important role it plays in lives and our community are more widely understood and appreciated.

Our goal is to serve 50 families on an annual basis starting in 2021 through 2024. Our revenue development is based on new construction, rehabs, repair projects, financial freedom center, and our ReStore. Internally we need to generate an additional \$200,000 per year to meet this goal. We currently serve between 20-25 families in terms of homeownership, repair projects and the Financial Freedom

Center (FFC) and the ReStore. It costs approximately **\$8,000-10,000** to serve a family in any of these capacities including staff time, resources, and follow up.

Recommended Revenue Development Strategy

Impact Drives Revenue. Building general public awareness of HAHfH accomplishments by reaching out on a very personal basis is the key to success. Recommendations in this report fall under the following four categories:

- Diversify sources of funding and grow unrestricted individual giving
- Expand earned and contributed income to support agency growth
- Develop and implement a comprehensive fundraising program
- Establish consistent funding streams to sustain increased staffing in mission-critical areas

The area for the most potential improvement with the greatest Return On Energy (ROE) is improving personal outreach to prospective individual, corporate, foundation, and civic group investors in the vision. With these goals in mind, the Impact Team has the tools and skills to initiate individual face-to-face visits with potential investors, including board members. They have been coached on using the tools and process and will begin to see the results of their initial efforts through potential investment commitments. A recommended practice of weekly check-ins and additional coaching will help maintain momentum.

Habitat for Humanity's Approach, and Overall Message

Approach

Hartford Area Habitat for Humanity has an open-door policy: All who believe that everyone needs a decent, affordable place to live are welcome to help with the work, regardless of race, religion, age, gender, political views, or any of the other distinctions that too often divide people. In short, Habitat welcomes volunteers and supporters from all backgrounds, and also serves people in need of decent housing regardless of race or religion. As a matter of policy, Habitat for Humanity International and its affiliated organizations do not proselytize. This means that Habitat will not offer assistance on the expressed or implied condition that people must either adhere to or convert to a particular faith, or listen and respond to messages designed to induce conversion to a particular faith.

Purpose of Development and How it Funds the Mission

The purpose of the Development Department is to develop and implement the Revenue Development Plan in order to raise vital funds in a cost-effective and timely manner for Hartford Area Habitat for Humanity's programs and operational infrastructure. In working with leadership and the board, the development team is able to reach fundraising goals through long term relationship building, donor cultivation and retention, event sponsorship, cause marketing, appeal campaigns, crowdfunding, corporate and foundation grants, community engagement and youth advocacy.

How we budget and fund the mission?

The next section outlines the annual budget process which outlines the following:

- Construction Expenses
- Department Expenses
- Development Revenue
- ReStore Revenue
- In-Kind Donations
- Other Revenue

For each house built, the development team must raise \$180,000 to cover hard construction costs, construction and family services staff. If the affiliate wants to build 10 new construction homes, the affiliate must raise \$1,800,000.

For each rehab home, the construction team budgets \$100,000 which includes purchase and hard construction costs. For each repair, the construction team budgets for the repair not to exceed \$10,000 and uses in-kind donations to reduce the overall costs to the family (veteran, elderly or limited mobility).

The financial freedom center is powered primarily by volunteers so the overall costs is minimal but the impact is great for the affiliate. The family services budget is roughly \$150,000 per year which is the fundraising goal.

Current Year Construction Hard Costs

NEW HOMES SOLD

Budget FYE 6/30/2021		Projected FYE 6/30/2020		Budget FYE 6/30/2020	
	\$456,500		\$1,325,000		\$1,275,000
	Was \$1,336,500				
1 Bristol		1 Main Street		1 Main Street	
2 Bristol		2 Main Street		2 Main Street	
Was Bloomfield		3 Main Street		3 Main Street	
Was New Construction TBD		4 Main Street		4 Main Street	
Was New Construction TBD		5 Main Street		5 Main Street	
Was New Construction TBD		6 Main Street		6 Main Street	
Was New Construction TBD		7 67 Woodbridge		7 67 Woodbridge	

REHABS SOLD

1 61 Taylor	1 10 Beach	1 10 Beach
2 70 Vineland	2 40 Lyness	2 70 Vineland
3 TBD ADDED		

RECYCLES SOLD

1 Moore	1 108 Cleveland	1 108 Cleveland
2 Enfield	2 80 Great Hill	2 80 Great Hill
	3 2 West Clay	3 TBD
	4 170 South Marshall	4 TBD
		5 TBD

NEW HOMES IN PROGRESS

None	1 Haviland Bristol 50%	1 Main Street 67%
	2 Haviland Bristol 50%	2 Main Street 67%
	3 Morningside 50%	3 Main Street 67%
		4 Main Street 67%
		5 Main Street 67%
		6 Main Street 67%

REHABS IN PROGRESS

None	1 Vineland 67%
	2 61 Taylor 50%

	BUDGET FYE 6/30/2021	PROJECTED FYE 6/30/2020	BUDGET FYE 6/30/2020
Development & Operations Net Income Was 11,341	-104,323	-296,175	44,780
Restore Net Income Was 131,862	6,161	65,620	120,000
Non-Home & Mortgage Revenue	-98,162	-230,554	164,780
Current Year Construction Hard Costs	-456,500	-1,325,000	-1,275,000
Land & Rehab Acq. Cost & Other Capital Costs	-310,000	-94,000	-215,000
Mortgage Receipts from Homeowners	540,000	540,000	575,000
Loan Principal Payments	-100,000	-177,000	-157,000
Non-Cash Book Expenses (Depreciation)	104,000	104,000	104,000
	-222,500	-952,000	-968,000
Cash Flow from Operations Was -959,297	-320,662	-1,182,554	-803,220
Mortgage Sales to CHFA - Was 8 Homes 2021 \$1,008,000	756,000	950,000	812,000
Fiscal Year Cash Flow	435,338	-232,554	8,780
Cash Beginning of Year	1,183,776	1,416,330	1,301,865
Projected End of Fiscal Year Cash Balance	1,619,113	1,183,776	1,310,645

Donation Revenue less all expenses except Hard

Cost to finish homes started in the previous fiscal year, and costs to start new homes/rehabs

Previous to CHFA mortgage sales, mortgages were assigned as collateral for

\$180,000 avg. per home at 70 cents on the dollar

April 7, 2020 Actual Cash Balance

1,450,000

2 New
Homes
3 Rehabs
2
Dancehall

reduced by 6/30/19 audit writedown
of WIP

HOME SALES & MORTGAGES

Home Sales	1,155,000
Cost of Homes Sold	-928,000
Cost of Land	-40,000
Gain/Loss on Home Sales	187,000
Est. Mtge. Discounting on Current Year Sales	-635,250
Est. Imputed Interest on All Mortgages Held	435,000
Loss on Home Sales and Mortgages	-13,250

BUDGET
FYE 6/30/2021

55% of NEW Mortgage because of no-interest
25-30 year term and risk

Accounting recognition of a portion of
mortgage collections as Interest Income

DEVELOPMENT & OPERATIONS

Development	1,648,000
Public Grant Revenue	50,000
Department Expenses See Payroll & Benefits tab	-1,802,323
Development & Operations Net Income	-104,323

RESTORE

Restore Revenue	906,160
Restore Expenses	-899,999
Restore Net Income	6,161

Income +/- Loss from Operations

CHFA, the purchaser of our mortgages
pays us 70 cents on the dollar. This is a
"return" of a portion of the heavier
discounting in Line 12 above. We hope
to sell 8 new mortgages

Gain on Sale of Mortgages	-111,412
NET BOOK INCOME \ -LOSS	151,200
	39,788
NET BOOK INCOME \ -LOSS	WAS - 317,697

PROJECTED

FYE 6/30/2020	2,005,400
	-1,552,400
	-151,000
	302,000
	-1,102,970
	435,000
	-365,970

BUDGET

FYE 6/30/2020	1,960,000
	-2,133,000
	-161,000
	-334,000
	-1,078,000
	435,000
	-977,000

	1,311,500
	0
	-1,607,675
	-296,175

	1,615,000
	165,000
	-1,735,220
	44,780

	838,720
	-773,100
	65,620

	1,030,000
	-910,000
	120,000

	-596,524
	190,000
	-406,524

	-812,220
	162,400
	-649,820

FUND DEVELOPMENT STRATEGY

Corporate Development Strategy:



House Sponsorship - House

Sponsorships allow for our corporate partners to invest in the community on a deeper level. By sponsoring a Habitat home, businesses are not only helping hard working families experience the dream and stability of homeownership they are also supporting the economic growth and vitality of the community. House Sponsorship levels range from \$10,000 partial house sponsorship to \$125,000 full house sponsorship.

Corporate Build Days - Corporate build days allow companies to offer their employees a private, hands on, team building experience that also gives back to the community. \$2,000 flat rate per team of 12 allows our affiliate to maximize our on-site fundraising potential throughout the year. By requiring sponsorship we are able to increase revenue by an estimated \$200,000

Build-A-Thon - Offered strictly to local corporations, this event bring the corporate community together for a three week building blitz with the goal of raising enough funds to sponsor a home for the upcoming year. This on-site team-building opportunity not only gives employees an opportunity to volunteer in their community, it also offers businesses additional marketing benefits. Sponsorship for this event ranges from \$3,000 to \$12,000 per team adding an estimated \$150,000 in revenue.





Playhouse Build - Playhouse build offers a unique opportunity for teams to work together to build and decorate a children's playhouse which is then donated to a local family or community group serving children in Greater Hartford. The pre-planning of this event allows employees to begin the team building process prior to the build day. On the day of the event they are engaged

in an activity that comes full circle with the recipient coming to pick up the playhouse at the end of the day. This one week building blitz event with each playhouse requiring a \$2,5000 sponsorship adds an estimated \$100,000 in revenue.



Golf Tournament - For over 25 years, with the help of our golf committee, Hartford Habitat has been hosting an annual charity golf tournament at Wampanoag Country Club in West Hartford. This event brings together over 30 corporate partners and over 100 golfers to join us on the green for the day. With an estimated revenue of \$70,000 this day on the course, helps to sponsor a home.

Corporate Grants - To help diversify our corporate funding, corporate foundation grants allow us to apply for much needed program support which is not necessarily linked to volunteerism. Larger foundation grants allow us to garner partial house sponsorships, operational funding, and any additional initiatives (i.e. data analysis) for which we need grant support.

Fund Development: Women Build

Hartford Area Habitat for Humanity knows that safe, decent and affordable shelter plays a critical role in helping families to create lives filled with possibility and progress. Women are disproportionately affected by the severe cost-burden of paying half or more of their income on their home. They make up a larger share of U.S. households living in poverty and as well as receiving government-subsidized housing. Women still earn, on average, 80 percent of what the average male does.

In May, HAHfH holds our fundraising event Women Build to increase individual support of the mission. This build event has the potential to bring in over \$100,000 with each participant donating a \$150 minimum to build. Habitat's Women Build volunteers come together from all walks of life to build stronger, safer communities by creating teams and building for a day. Since women and children make up the majority of people populating Habitat neighborhoods, as they are the most likely to be affected by poor living conditions. Our Women Build event provides the opportunity for women to take a proactive step in serving their communities while fundraising through teams.

Fund Development: Faith Engagement

Interfaith groups joining together can provide a vital witness to the community. HAHfH works in helping religious faiths come together toward ending poverty & blight in the Greater Hartford & Tolland area. Establishing strong relationships with churches has strengthened our affiliate and has helped us serve more families. Decent housing for all is a core issue.

Habitat for Humanity has a longstanding, extensive partnership with Thrivent Financial to continue our faith-based experience - Building on Faith or a Thrivent Build. HAHfH and Thrivent bring members and volunteers together to increase Faith engagement that allows for participation in Thrivent's grant programs. These programs can vary from full or partial sponsorship of a house funding. The affiliate must be in good standing with Habitat for Humanity International as well as meet minimum standards as detailed in the HFHI Quality Assurance Checklist.

Civic & Youth Revenue Development

Beginning in 2017, Hartford Area Habitat for Humanity expanded capacity to host more Youth and Civic volunteer teams, activities and fundraising events; specifically designed to engage volunteers as Ambassadors and Fundraisers for our Mission. Centered around build day sponsorship, these models have raised over \$50K through previously untapped donors, and have brought hundreds of Ambassadors to our affiliate:

Civic Revenue Development:

In 2017, we implemented a new build day sponsorship model called “Partner Build Days”. This fundraising model offers a team of individuals an opportunity to reserve a build day on our calendar and requires a commitment to raise a minimum of \$50 per volunteer, per build day to help fund our construction projects and drive our Mission. This model focuses on engaging new individual donors through the use of our online crowdfunding platform, MobileCause. Our goal for this model is to create a base of recurring fundraising teams through exceptional build site experience. These opportunities are typically available November – April.

Hartford Habitat has also seen an increase in civic team utilization of third-party fundraising events to generate build day sponsorship, or as independent fundraisers. Events such as; Restaurant Nights, Paint Nights, Color Runs, and Wine Tastings have helped us to reach another untapped donor demographic.

Youth Revenue Development:

In 2018, we launched our Youth Advocacy & Engagement Program that focuses on engaging our future leaders through advocacy, engagement, fundraising and build activities. Through this program, we engage students from Middle Schools to Masters Programs to share our Mission and inspire a lifelong passion for public service.

Revenue development through this program also follows the build day sponsorship model established with “Partner Build Days”. Habitat recognizes certain youth demographics have different fundraising capacities, so we have structured our “Education Build Day” fundraising requirements differently. Higher Education teams (typically students over the age of 18) must meet a minimum fundraising requirement of \$50 per volunteer per build day. High school and community youth teams (typically students between 16-18 years of age) must meet a minimum

fundraising requirement of \$25 per volunteer, per build day. These opportunities are typically available November – April.

During our annual Youth Month (April), participants also engage in affiliate sponsored fundraising events hosted at local supermarket locations. During these Supermarket advocacy events; students join affiliate staff at pop up booths outside of these locations to share Habitat Mission and highlight youth advocacy in the community. Donation boxes are provided at each booth, and Habitat staff also has the ability to process credit cards. Through the month, we will typically see revenue of \$500 cash from these events.

Each year, our Youth Month ends with a culmination “Youth Advocacy & Engagement Conference” event. This conference provides an opportunity to celebrate and educate our future leaders ages 11-18. This event is currently funded through contributions from “Education Build Days”, Supermarket Advocacy Dates, and In-kind donations of food, beverage, and service. We believe that this event has the capacity to continue to grow in attendance and as a youth driven fundraising event.

Public Sector Revenue Development

Kate will add description and revenue

Major Gift Cultivation

Major Investor Approach, Process, and Tools

When it comes to generating revenue, the greatest return on energy comes from face-to-face visits with key prospects whether they are decision makers in government and foundations or high potential individual investors in the strategic vision. The Suddes “For Impact” method, an innovative approach that has helped organizations across the country dramatically increase their revenue, was implemented at Habitat for Humanity. This method actively engages board members in their most important role as champions of the organization. During the last 35 years, the “For Impact” method has generated \$2 billion in revenue. The key to success is maximizing gains from the best prospects, which means carefully selecting prospects and keeping up a disciplined approach to scheduling visits on a weekly basis. The more visits with qualified prospects, the more opportunities to raise revenue.

The first step in this process was to create a clear, concise message and produce an Engagement Tool (ET - see page 9) to use with prospects to share the message and stories of Habitat. The next step was to create a Master Prospect List (MPL) composed with the names of potential funders who have the greatest potential to be major investors. The MPL provides a means for tracking progress and follow up action steps which will help in generating greater results.

The strategy for major investors is as follows:

1. **Identified current top supporters:** People who have already invested in Habitat’s impact want to continue to help. They will welcome a visit to gain a better understanding of the organization’s vision for the future and a discussion of how they fit in the funding plan. In some cases, this may be the first time they have really been asked to invest.
2. **Identified other top priority prospects:** The team used the following criteria:
 - **Capacity:** This is the prospect’s capacity to make a major investment
 - **Relationship:** This is an indication of the prospect’s relationship to Habitat or to similar causes
 - **Timing:** If a prospect has just given a gift, it may be better to wait. Is there some info. about the individual that the timing is right – just sold their company, finished their pledge to another campaign, etc.?
 - **Gift History:** What is this prospect’s giving history to the organization?
 - **Philanthropic History:** This is a measure of the prospect’s general willingness to give philanthropically. Have they supported other like organizations? Do they have a family foundation?

Prospects were prioritized and staff and board roles were defined.

Relationship Manager: This is a Habitat board or staff member who manages the relationship by regularly reaching out via email, telephone calls, and visits (at builds, programs, and/or over coffee). With frequent involvement, when the time is right for “the ask”, the relationship has flourished.

Door Opener: This is a person, internal or external to the organization, who has the closest relationship to the prospect and is willing to approach them about a visit. An introductory email template was crafted to make the process simple.

Visitors: This is a team of two to three board members and/or staff who will participate in the visit. It will be determined prior to the visit who will make “the ask”.

Coaching is provided prior to, during, and after the visits to build board and staff skills and confidence and to secure the intended investment. Dialogue talking points are used as background for the visits, not as a script. Each visitor draws from their own experience and passion using stories and a style that is authentic for them. Follow up for every visit with a thank you within 48 hours is critical to the process.

Habitat Engagement Tool (ET) Dialogue Guide

The ET is in three sections and flows top to bottom and left to right. Let the ET guide the dialogue to get the prospect engaged and sharing their stories so they are compelled to help/support. Be authentic and ask lots of questions, remember two ears and one mouth – *listen twice as much as you talk*. You might have several goals on a visit – financial support/investment, get referrals, serve on the board, volunteer, door opener, etc. Ask how much time you have to make sure you get to “the ask”. Use a pen/marker to write on it, diagram, make notes – get the prospect engaged!

Set your intent at the start of a visit. In conjunction with strong predisposition, an INTENT will help you TRANSITION throughout the conversation and DRIVE toward an ask. Stating intent could be as simple as outlining the FLOW for the visit, “Thanks for taking time to visit with us today. We’re hoping to connect with people that really have a similar passion for helping Habitat. What we would like to do is take a few minutes to get to know you [the OPEN]. We would like to share a little bit about what we’re doing [the STORY]. And, then, if it’s okay, we would love to talk about ways to help [the ASK / Presenting the Opportunity].” When they’re not able to navigate the ‘flow-of-the-visit’, it’s hard transitioning to the ask. It’s as though they are waiting to be invited to have a discussion about how they can help.

Top Section:

WHY Habitat exists, your WOW factor, what makes Habitat unique! Use the timeline to share your story. Ask when they became aware and/or involved with Habitat. Get them to share their story and listen to what they say. Ask lots of questions and engage the individual – be authentic around your own story.

Did You Know? section: Ask them if any of these resonant? Why? Listen!

- Habitat has built 231 homes with 13 more in 2017
- Over 4,000 volunteers are hosted annually
- \$8 million+ has been added to the Greater Hartford Region’s tax base

Use the photos to share your story:

Habitat Volunteers: Legrand came to us initially for employee team building and then as the relationship prospered they designated Habitat as their beneficiary with in-kind and financial donations, volunteering on site 3-4 builds per year, etc. They see Habitat as a “full stop” - all their time, talent, and treasure is imbedded in one stop. Habitat is not a hand out - it’s a partnership and fits with the culture of their company as a family – a close knit that mimics their own shop.

A Brush With Kindness: A Brush with Kindness (ABWK) is a program that assists low-income families in repairing and renovating their homes so they can continue to live in safe, decent homes. We focus on assisting elderly, veteran families and those with limited mobility. A Brush with Kindness projects include painting, landscaping, weatherization and minor repair services.

150 hours of sweat equity = homeowners: Annette Velez is so grateful to Habitat and now has a sense of empowerment as a homeowner and the belief that she can achieve anything. She went back to school and is now a para legal. Annette is a role model for her daughter Kala who was four when they got their house and is in college now - she is motivated by her mother’s achievements and credits Annette with her success.

ReStore Home Improvement and Donation Center: sells new and gently used furniture, home accessories, building materials, and appliances to the public at a fraction of the retail price. All proceeds are used to build homes, community, and hope in the Hartford area and around the world.

Middle Section:

WHAT Habitat does:

- Build Community Impact
- Build Sector Impact



Through Partnership... ...We Empower

DRAFT

1976	1989	2006	2008	2014	2019
Founded in GA, Global Housing	Hartford Area Habitat Founded	100th House Built	Swift Village Completed; First Community Build	ReStore Opened	30th Anniversary

Did You Know?

- Habitat has built 231 homes with 13 more in 2017
- Over 4,000 volunteers are hosted annually
- \$8 million+ has been added to the Greater Hartford Region's tax base
- 82% of our homeowners' children graduate from high school

Strengthening Communities Through Homeownership!



Habitat Volunteers



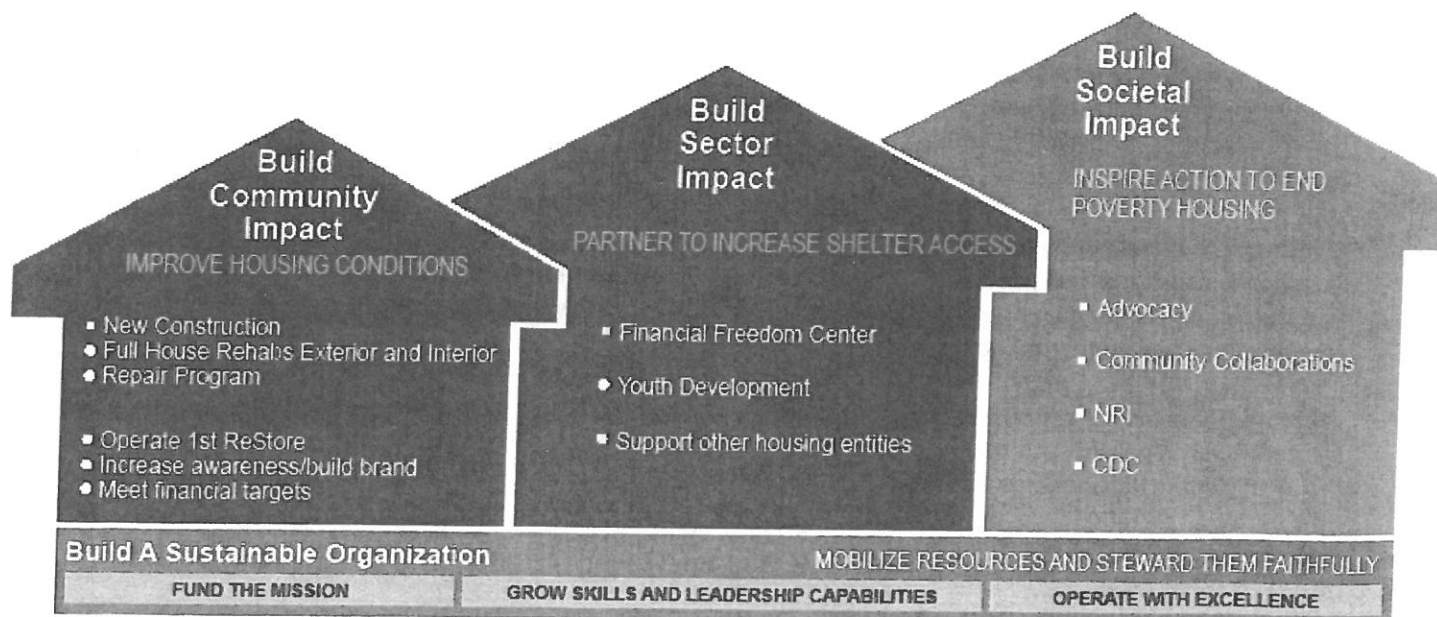
A Brush with Kindness



150 hours of sweat equity = homeowners!



ReStore Home Improvement and Donation Center



SUPPORTING EVEN MORE FAMILIES!

Board Engagement

Donor Tracking and Acknowledgement Practices

Hartford Habitat has established and implemented best practices in donation processing, recording, and acknowledgement. We are committed to providing a prompt, high quality acknowledgement for every gift that our affiliate receives:

Overview:

- Physical Donations (Check, Cash, Manual CC Entry)
 - All physical donations will be processed & recorded within 3 business days of receipt
 - All physical donations will be acknowledged within 1-2 business days of processing
- Online Donations (Affiliate Website)
 - All online donations will process within 1-2 business days through MobileCause platform
 - All online donations will receive an immediate electronic acknowledgement
 - All online donations will be recorded and will receive a secondary physical acknowledgement the first week of the month following the date of donation.
- Third-Party Donations (Employee Giving Portals, Facebook, PayPal, etc.)
 - All third-party donations will be processed within each external system
 - Habitat will receive a notification of funds distribution
 - All third-party donations will be recorded and acknowledged the first week of the month following the date of distribution.
- Direct Deposit & Stock Transfer
 - All direct deposit donations will be processed within 1-2 business days by our banking institution
 - All stock transfer donations will be processed within 1-2 business days by our Finance Director
 - All DD & ST donations will be recorded and acknowledged within 3-5 business days of the date of transaction

Donation Acknowledgement Best Practices:

- All donations receive a physical acknowledgement letter, when mailing address is provided
- All donations $\geq \$250$ will receive a handwritten thank you card from CEO
- All donations $\geq \$1000$ will receive a personally signed acknowledgement letter
- Current and previous fiscal year donors will receive “Habitat Happenings” communications
- Major donors will receive special thank you gift from CEO for continued support

2017 RDP Recommendations Implemented:

1. Obtain/improve revenue data system training

Donor database upgraded to NEON CRM in 2019. System provides a more streamlined, accessible, and cloud-based platform for donor data entry and reporting. NEON system offers a multitude of staff training videos, tutorials, and 1-2-1 specialist walkthrough training hours through our contract. Staff also has access to the NEON support community, where other NEON client questions and feedback are addressed by support staff.

2. Create/improve the instructions template and protocols for data entry

We have established data entry protocols for NEON CRM, and enforce these protocols with all data entry staff. Data entry staff has been trained by the system administrator on full data entry protocol, and instructions are easily accessible within the system for reference by data entry staff. User permissions have been put in place to limit data entry accessibility to only fully trained data entry staff.

3. Master Prospect List (MPL) for major investors

MPL has been generated, and is being maintained externally from the full donor database. Database administrator has been appointed to continuously update, report results, and maintain this listing. Supplemental prospect lists for MPL special campaigns or initiatives will be created, maintained or integrated at the discretion of the CEO.