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ACTS HOUSING/ACTS LENDING DEVELOPMENT COMMITTEE MEETING 02/16/2017

DEVELOPMENT COMMITTEE MEETING NOTICE

DATE: Thursday, February 16th

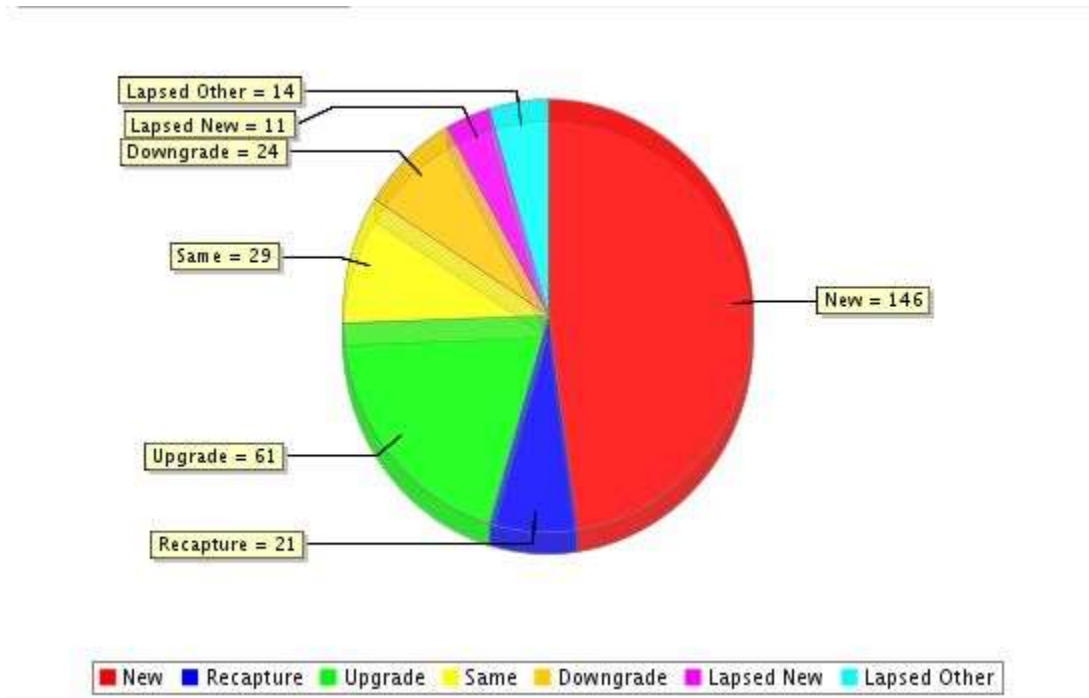
TIME: 8:30 am – 10:00 am

PLACE: Milwaukee Athletic Club, 758 N Broadway

	Agenda Item	Timeline	Who
1	2016 – 2017 Fundraising Update <ul style="list-style-type: none"> • Final 2016 Fundraising Update & Approaches • 2017 Fundraising Goals and Update 	10 min	Autumn, Becky
2	Other 2017 Updates <ul style="list-style-type: none"> • Marketing Plan • National Foundation 	10 min.	Becky, Mike
3	2017 Bus Tours Updates <ul style="list-style-type: none"> • Edits to bus tour list • Confirm your sign up / sign up and willingness to invite 2-3 friends? 	5 min	Autumn
4	Capital Campaign Contact List <ul style="list-style-type: none"> • Capital Campaign Update & Strategy • Circulate “No connection” list (do you have any connection to these folks?) • Bricks/Other small acknowledgments 	10 min.	Mike, Becky
5	2017 Event Updates <ul style="list-style-type: none"> • Strategy Update & Event Committee • Venue, Co-chairs and Sponsorship Discussion (can you add anyone to the sponsorship list? Do you have any venue ideas?) 	20 min.	Amy, Becky
7	2017 End of Year Appeal Recap <ul style="list-style-type: none"> • Brainstorm: Strategy and timing for 2017 appeal? 	20 min.	Autumn, Becky
6	Upcoming Items/Event Update <ul style="list-style-type: none"> ○ Sat, March 4th 11 am – Bliia’s Retirement Party ○ March 21st – first 2017 bus tour 	5 min.	
7	Joys and Concerns	5 min	All
8	Adjourn		

2016 Year End Insights

1/1/2015 to 12/31/2015 VS. 1/1/2016 to 12/31/2016



Status	Number of Donors	% of Donors
Totals	306	
New	146	47
Recapture	21	6
Upgrade	61	19
Same	29	9
Downgrade	24	7
Lapsed New	11	3
Lapsed Other	14	4

Displaying 1 - 7 of 7

- | | | | |
|------------------|---|---------------------|---|
| New | Donors who gave their first gift after the first time period | Downgrade | Donors that gave less in the second time period than in the first time period |
| Recapture | Donors that gave prior to the first time period that did not give in the first time period but did give in the second time period | Lapsed New | Donors that gave for the first time in the first time period (new donors to your organization) but did not give in the second time period |
| Upgrade | Donors that gave more in the second time period than in the first time period | Lapsed Other | Donors that gave prior to the first period and also gave in the first time period but did not give in the second time period |
| Same | Donors that gave the same amount in both time periods | | |

Highlights

- 146 New Donors from 2015 – 2016: ~ 26 new corporate donors; 120 new individual donors. Largest new source of donors from ACTS Longest Table Event
- 19% of donors upgraded their gift vs. 7% of donors who downgraded
- Only 7% of donors lapsed
- 6% of donors “recaptured” from years prior to 2015
- All 2016 Goals Exceeded

Areas for Growth 2017

- Avg. Individual Gift size 2016: \$391.84 (versus average gift size 2015: \$741.94) need to work on segmenting & targeting donors for increased giving
- Need to continue to grow number of individual donors
- Continue to build and guarantee success of 2017 Longest Neighborhood Table Event
- Ensure stewardship program remains strong as # of donors increases
- Keep an eye on “lapsed” donors
- End of Year Appeal Improvements

Totals, Goals and Comparison

Total dollars raised 2016: \$1,134,567.89¹

- Capital Campaign: \$525,000
- Foundations & Corporation: \$431,371.88 (2016 Goal: \$360,525)
- Fundraising Event: \$78,335 (2016 Goal: \$55,000)
- Individual & Religious Organizations: \$99,861.01 (2016 Goal: \$72,250)

ACTS Housing vs. 21 other “community development” databases (\$1,000,000 - \$2,500,000)

Aggregate Data •

Giving Dynamics Report							
Average Across 21 Databases							
Displaying 1 - 7 of 7							
Status	Number of Donors	% of Donors	1/1/2015 - 12/31/2015	1/1/2016 - 12/31/2016	\$Changed	% Change	
Totals	632		\$959,897	\$859,373	(\$100,523)	(10)	
New	149	23	\$0	\$160,093	\$160,093	0	
Recapture	37	5	\$0	\$104,334	\$104,334	0	
Upgrade	74	11	\$136,011	\$253,801	\$117,790	86	
Total Gains	-	-	\$136,011	\$518,228	\$382,217	281	
Same	66	10	\$125,912	\$125,912	\$0	0	
Downgrade	69	10	\$365,471	\$215,234	(\$150,237)	(41)	
Lapsed New	157	24	\$103,719	\$0	(\$103,719)	(100)	
Lapsed Other	80	12	\$228,784	\$0	(\$228,784)	(100)	
Total Losses	-	-	\$697,974	\$215,234	(\$482,741)	(69)	
Net	-	-	\$959,897	\$859,373	(\$100,523)	(10)	

ACTS Housing vs. 21 other "community development" databases (\$1,000,000 - \$2,500,000)

My Organization •

Giving Dynamics Report

Totals From Your Database

Displaying 1 - 7 of 7

Status	Number of Donors	% of Donors	1/1/2015 - 12/31/2015	1/1/2016 - 12/31/2016	\$Changed	% Change
Totals	305		\$952,521	\$1,008,549	\$56,027	5
New	145	47	\$0	\$123,765	\$123,765	0
Recapture	21	6	\$0	\$18,725	\$18,725	0
Upgrade	60	19	\$526,346	\$696,434	\$170,087	32
Total Gains	-	-	\$526,346	\$838,924	\$312,577	0
Same	29	9	\$64,825	\$64,825	\$0	0
Downgrade	24	7	\$327,455	\$104,800	(\$222,655)	(68)
Lapsed New	11	3	\$31,015	\$0	(\$31,015)	(100)
Lapsed Other	15	4	\$2,880	\$0	(\$2,880)	(100)
Total Losses	-	-	\$361,350	\$104,800	(\$256,550)	0
Net	-	-	\$952,521	\$1,008,549	\$56,027	0

Overview

The primary focus for ACTS' strategic fundraising & marketing efforts in 2016-2017 is to strengthen contributions to ACTS Housing in a meaningful way. This is accomplished through a highly relational, concentrated plan with the aim of creating new ambassadors¹ while also cultivating existing relationships.

Goals:

1. **Stewardship** – Steward existing ambassadors (< 15% donor attrition²) toward a 10% overall increase in individual/corp & foundation giving by:
 - Personalized stewardship plans for various ambassadors
 - Additional acknowledgment of and engagement with existing ambassadors
 - 100% Board/Committee Giving

2. **New Ambassador Creation** – Create 70 additional individual ACTS contributors³ and 15 new foundation/corporation contributors⁴ by:
 - Additional “awareness activities” and stronger social media presence
 - Continue to establish ACTS as an affordable housing thought leader
 - Introducing new potential supporters to ACTS Housing through the Capital Campaign

3. **Fundraising Goals** –
 - Fundraising Event 2017: \$85,000 (vs. \$78,938 raised in 2016)
 - Foundation & Corporation 2017: \$664,504 (vs. \$99,956 raised in 2016)
 - Individual & Religious Organizations 2017: \$103,000 (vs. \$432,599 raised in 2016)

Segment	Activities (annually)
Segment I: Board/Committee, Donor \$1,000+	Newsletters, annual report, annual appeal, personal note x2, phone call, event invitation(s), personal meeting and/or specialized individual outreach
Segment II: Committed ACTS volunteers, Donor \$500 - \$1,000	Newsletters, annual report, annual appeal, personal note, phone call, event invitation(s) and/or personal meeting
Segment III: ACTS volunteers, Donors of all levels	Newsletters, annual report, annual appeal, personal note, phone call, event invitation(s).
Segment IV: Potential ACTS ambassador	Newsletter, annual report, bus tour invitation

¹ Ambassador defined as financial contributors, board/committee members, ad hoc volunteers, bus tour attendees and community partners/leaders

² Compared to 10% donor attrition from 2015-2016 and 20% donor attrition from 2014-2015

³ Compared to 74 new individual contributors so far in 2016, and 44 in 2015

⁴ Compared to 14 new found/corp contributors so far in 2016, and 11 in 2015

Calendar: (P) = Personalized

	Newsletter	Mailings (Online & Mail)	Bus Tour	Event	Social Media Regular Features (family, closing, ambassador, team & partner orgs)	Capital Campaign
<i>January</i>					X	
<i>February</i>		X			X	X – kick off meeting
<i>March</i>	X		X	Blia's Retirement	X	(individual meetings)
<i>April</i>			X (capital campaign tour)		X	(individual meetings)
<i>May</i>		Mailing / Online ask with newsletter	X (Professional women's tour)		X	(individual meetings)
<i>June</i>	X (P)		X		X	(individual meetings)
<i>July</i>			X		X	(individual meetings)
<i>August</i>		X	X		X	(individual meetings)
<i>September</i>	X (Annual Report)			Longest Table Event	X	(individual meetings)
<i>October</i>			X		X	(individual meetings)
<i>November</i>		EOY solicitation (P)			X	(individual meetings)
<i>December</i>	X (P)	EOY online solicitation	X		X	X – wrap up meeting

Board/Committee Bus Tour Sign Up Sheet

Tour Date	Committee/Board Member 1	Committee/Board Member 2	Committee/Board Member 3	Committee/Board Member 4	Committee/Board Member 5
Tues, March 21 st 8:00 am – 10:00 am and 11:30 am – 1:30 pm** <i>NOTE DATE CHANGE</i>	Mike Zimmerman	Amy Schleg	Pam Evason		
Thurs, Apr 27 th 11:30 am – 1:30 pm (capital campaign tour)					
Wed May 24 th (professional women’s tour)	Autumn Latimore	Amy Schleg	Pam Evason		
Sat, May 27 th (professional women’s tour cont.) (PENDING)	X	X	X	X	X
Tues, June 20 th 11:30 am – 1:30 pm	Michael Mack (June or Aug)	Josh Yamat			
Thurs, July 13 th 11:30 am – 1:30 pm					
Wed, Aug 23 rd 11:30 am – 1:30 pm	Michael Mack (June or Aug)	Jon Mariano			
Sat, Oct 28 th 8 am – 10 am	Jon Mariano				
Thurs, Dec 7 th 11:30 am – 1:30 pm					



Bring us home.

ACTS Housing

HISTORIC IMPACT

1992 - 2015



Since 1992, ACTS Housing has empowered 2,172 families in transitioning from renter to owner by providing:

- Financial counseling
- Real estate services
- Home rehab counseling
- Mortgage loans for home repair.

These strong families save money, improve their quality of life, reclaim their neighborhoods and help to stabilize the City of Milwaukee.

We need to do more.

Demand for ACTS' services is high. While we supported 165 families in homeownership in 2016, there are many more who need support. In order to ensure all strong Milwaukee families have affordable access to homeownership, we need to do more.

In 2017 ACTS launched our first ever Capital Campaign.

Your support revitalizes Milwaukee's neighborhoods. Support for our building takes a once vacant, eye-sore property in the central city and turns it into a thriving nonprofit office where ACTS families receive needed services. Support for our loan fund enables families to afford the acquisition and renovation of a foreclosed property, turning a house into a home.

CONTACT ACTS

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One Family's Impact



Child of an ACTS Homeowner looks out the door of the family's newly purchased foreclosure before repairs.



The same living room as pictured above, after repairs.



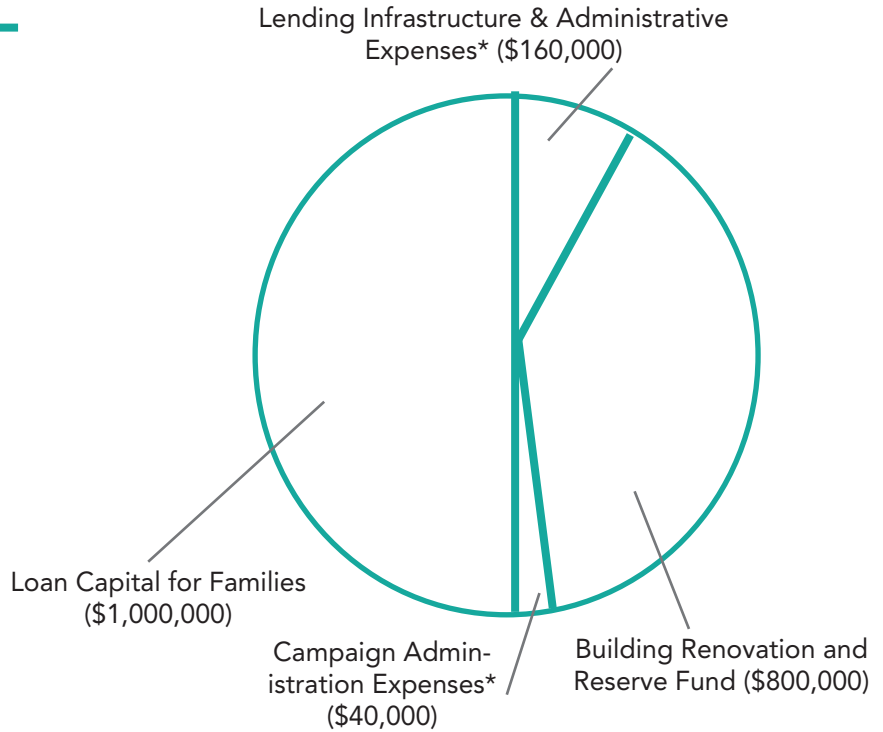
Bring us home.

Campaign Needs: \$2M Goal

**The campaign vision is simple:
Bring Us Home.**

It takes all of us to make Milwaukee the vibrant city it can be. Loan fund support brings families home; Building capital allows ACTS to practice what we preach: transition from renters to owners, and bring our team home.

Thank you for your consideration.



*These are administrative charge ceilings, with any savings used for building or loan capital.

Leadership

Campaign Co-Chairs



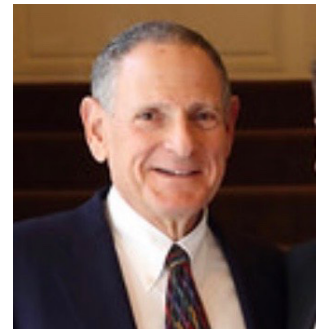
Tim Sullivan

Tim Sullivan was appointed CEO of the Rev Group in 2014 and possesses more than 35 years of manufacturing and management experience. In addition to his extensive experience in manufacturing and management, Tim supports many causes in Milwaukee's neighborhoods.



Nina Johnson

Nina Johnson is the Director of Community Relations and Community Development at Guaranty Bank's headquarters in Glendale, but her duties encompass Wisconsin, Illinois, Michigan, Minnesota and Georgia. Nina is a passionate community affairs leader and has been an ardent supporter of ACTS Housing for more than five years.



Les Weil

A former business owner and entrepreneur, Les Weil is a philanthropist and an active community volunteer. Since 1994, he has collaborated with more than 100 nonprofit organizations in the greater Milwaukee and greater Ft. Lauderdale areas. Les has been instrumental in helping to grow ACTS' fundraising and governance efforts the past two years.