



RESOURCE DEVELOPMENT ASSESSMENT

PREPARED FOR REDACTED
JULY 2025

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SUMMARY

Over the past several years, REDACTED Boys & Girls Club has been on a clear and exciting growth trajectory. The organization has increased revenue, expanded programs, and developed a stronger community presence. These wins reflect both the strength of the Club's mission and the deep commitment of its leadership, staff, and supporters.

At the same time, this growth has outpaced some of the systems, tools, and internal processes that support fundraising and stewardship. With a few strategic refinements- most of which build on assets that already exist- the Club has an opportunity to significantly increase both the predictability and sustainability of its resource development efforts.

This assessment was designed to serve two purposes:

- 1) To provide a rapid diagnostic of current systems, strengths, and gaps.
- 2) To outline actionable next steps that unlock capacity and deepen impact across key revenue streams.

By enhancing the infrastructure that supports donor engagement and team alignment, the Club can ensure that its next chapter of growth is both intentional and scalable.

RATINGSCALE

Here is how the rating scale for the classes



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SUMMARY

B The Boys & Girls Club of REDACTED has a powerful mission and an emotionally compelling story but its external communication channels aren't yet optimized to reflect that energy to spur community investment at scale. While the organization has made progress in producing tangible end-of-year wrap-ups and maintains consistent activity on social media, there's significant opportunity to deepen community connection, broaden donor affinity, and elevate the Club's public identity as a leading force for youth in REDACTED.

Physical Collateral (flyers, brochures, reports, and more)

C The Club has produced some strong, mission-forward content particularly through its end-of-year impact materials and regular email outreach. However, collateral is currently under-leveraged. The "one-pager" summary is clear and visually aligned with the brand but lacks contextual depth and customization for diverse audiences. A more intentional approach to collateral (IE targeted brochures for corporate partners, parents, community groups, and event attendees) would increase the utility and longevity of these tools.

Recommendations

Develop a modular collateral suite anchored by the existing one-pager, with tailored inserts or sidebars for each key audience segment (corporations, families, foundations, community partners).

Social Media & Public Storytelling (Meta, Constant Contact, LinkedIn)

C A review of recent social media content reveals that most content falls into two categories: youth



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SUMMARY

C REDACTED has a solid foundation of development infrastructure, with platforms like Give Lively and MyClubHub effectively capturing and processing donor transactions. These tools, combined with a follow-up acknowledgment protocol from the Development Team, create the potential for a strong donor experience. However, current systems are not fully optimized or consistently used across the team. The CRM contains incomplete or inaccurate donor records, and there is no clear or documented process guiding donor movement through the lifecycle. Stewardship actions are largely ad hoc, and key performance indicators are not being tracked in a centralized way. The pieces are in place but they require alignment, automation, and ownership to fully support sustainable revenue growth.

Donation Lifecycle Mapping & Moves Management:

C There is currently no documented or consistently executed donor lifecycle pathway guiding how a supporter is identified, cultivated, solicited, and stewarded. Without a clear lifecycle map or a working moves management system, donor outreach tends to be reactive and insular rather than strategic and forward facing.

Recommendations

Implementing even a simple pipeline, tracking prospects across four stages (Identification, Cultivation, Solicitation, Stewardship) would bring structure, accountability, and visibility to the development process. Mapping this lifecycle across key gift types (first-time, recurring, event-based, major gift) would further refine staff workflow, and create opportunities for relationship.



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SUMMARY

C REDACTED individual giving program shows promising structure but limited strategic execution. With 405 donors in 2024 and an average gift size of \$415, the program is producing steady contributions but the 43% retention rate, lack of entry-point cultivation, and absence of a Top 20 portfolio point to a system that is primarily reactive and insular. Most giving appears to come from a familiar inner circle: board-adjacent donors, past event attendees, and known supporters. Given the population size and philanthropic capacity of REDACTED County, 405 donors is not reflective of broad-based community support. There is significant untapped potential to grow the base, upgrade existing donors, and re-engage lapsed supporters especially with clearer pathways for engagement, more segmented communication, and a proactive approach to stewardship and acquisition.

New Donors

D There is little evidence of a structured strategy for identifying, attracting, or converting new donors. Entry points are passive, mostly tied to event participation, unsolicited online donations or exposure to appeals. There's no lead generation strategy in place, and very few systems are designed to transition community members, volunteers, or parents into first-time donors.

Recommendations

Create Donor Entry Pathways: Use QR codes, raffles, and email capture at every event, volunteer activity, and public activation. Connect these to a clear donor welcome journey.

Digital Acquisition Campaigns: Create targeted digital social media campaigns focused on storytelling and small-gift asks. Consider creating a "Let's Go" campaign with a strong call to action.



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SUMMARY

C Corporate giving at REDACTED is active but largely passive in nature. Most partnerships stem from inbound interest, event-related outreach, or as a function of individual giving with limited infrastructure to support sustained cultivation, alumni engagement, or workforce-based philanthropy. Given the economic landscape of REDACTED County and the Club's potential to connect with local employers through parents, alumni, and civic presence, corporate contributions represent one of the most scalable and underdeveloped revenue streams. Without stronger tracking systems, intentional outreach, or clear engagement pathways, the Club risks leaving significant partnership value on the table.

Prospecting & Network Activation

C There is no active prospecting pipeline in place for corporate outreach. The Club does not consistently track employer data for current families, alumni, or board connections, resulting in missed opportunities for aligned partnership development.

Recommendations

Build a dynamic Corporate Prospect Tracker using existing contacts, board suggestions, and employer data from families and alumni.

Launch a "Where Do Our Families Work?" campaign using intake forms, email surveys, and event RSVP prompts to gather employment data.

Work with BGCA to tap into any existing alumni tracking or workplace giving initiatives already piloted at the national level.



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SUMMARY

B Special events are a highly visible part of REDACTED'S fundraising strategy, with established staples like the Gala and Golf Classic generating meaningful revenue (projected at \$370,000) and providing donor engagement opportunities. Sponsorship materials are strong, and event execution is solid. However, these events are treated largely as standalone fundraisers rather than integrated donor development tools. Post-event follow-up is minimal, data capture is inconsistent, and ROI tracking is informal, limiting long-term impact. Additionally, ABGC lacks a signature, mission-driven event designed to inspire and attract new donors through powerful storytelling and community engagement.

Event ROI & Data Capture

C While events are profitable and well-attended, there is no consistent framework for tracking both the financial ROI (net revenue after expenses) and relational ROI (new donors acquired, prospects identified, follow-ups executed). This limits the ability to refine future strategy or evaluate success beyond the top-line numbers.

Recommendations

Implement a post-event ROI tracker that includes: gross/net revenue, number of new contacts collected, conversion rate to donors, and board participation.

Capture all guest data digitally (QR codes, check-in tablets, raffles) and tag contacts in the CRM for future segmentation and cultivation.

Mission-Driven Signature Event Campaign

The logo for 'LET'S GO STUDIO' features the text 'LET'S' in a bold, dark blue font, 'GO' in a larger, bold, dark blue font, and 'STUDIO' in a smaller, bold, dark blue font. To the right of 'LET'S' is an orange circle containing a white right-pointing arrow.

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OVERALL ASSESSMENT:

BGC REDACTED is strong on presence and transactional fundraising but weak on systems and growth strategy. Moving from Foundational (C) to Advanced (A) requires better process alignment, data-driven decision-making, and donor pipeline discipline.

Strategic Priorities for the Next 90 Days

1 Build the Infrastructure for Predictable Growth

- Develop a donation lifecycle map and moves management template (stages: Identification → Cultivation → Ask → Stewardship).
- Launch a tiered stewardship matrix for individuals and corporations (who gets what touch, when, and by whom).
- Create a KPI dashboard tracking retention, LYBUNT, donor acquisition, and campaign ROI.

2 Expand Entry Points & Broaden the Donor Base

- New Donors: Launch a low-barrier digital acquisition campaign + event-based lead capture strategy.
- Corporate Engagement: Begin an employer mapping initiative and build an alumni-professional prospecting list.
- Community Engagement: Implement a social content calendar with 4 new content pillars: video storytelling, board spotlights, alumni features, and partner highlights.

3 Maximize Event ROI as a Pipeline Tool

- Standardize **post-event donor conversion** steps (thank-you, impact recap, and an invite to the next engagement).
- Implement **data capture tools** (event QR codes, sign-in sheets, etc.)
- Assign **event members** (roles, responsibilities, and contact info)



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DONOR LIFE CYCLE HOW WE ACQUIRE NEW DONORS AND EXPAND THEIR GIVING

To expand donations we'll adopt a five-stage donor lifecycle to guide engagement from first contact to long-term partnership. This approach ensures every donor receives intentional, mission-driven touchpoints, moving from reactive outreach to a strategic, relationship-focused model.

IDENTIFICATION STAGE 1	CULTIVATION STAGE 2	SOLICITATION STAGE 3	STEWARDSHIP STAGE 4	GROWTH STAGE 5
Identify potential donors through event lists, other nonprofit donor rolls, board connections, and real estate or wealth data.	We build relationships by inviting prospects to tours, volunteer opportunities, and events, while learning about their interests to tailor future engagement.	Make an compelling Ask that is based on donor interest and conforms with opportunities for monthly, annual, and major gifts.	Thank donors within 48 hours with a personalized acknowledgment and tax receipt, then activate a tailored stewardship plan to keep them engaged and informed.	Encourage continued support by presenting annual giving society opportunities, hosting VIP appreciation events, and offering tailored proposals for upgrades or planned giving.

STEWARDSHIP PLAN FOR ALL DONORS WHO HAVE GIVEN A GIFT THIS FISCAL YEAR

To launch this initiative, we'll create a segmented list of all donation activity for FY24/25 and assign donors to the levels below. Each level comes with curated stewardship touches and branded swag to recognize their impact. All new donors will begin their journey at the Dreamer level, and both new and existing donors will be reviewed annually to ensure their recognition aligns with their giving.

	DREAMER SWAG BAG \$200-1K	SUPPORTER SWAG BAG 1K-5K	GIVER SWAG BAG 5K-10K	CHAMPION SWAG BAG 10K-25K	FOUNDER SWAG BAG 25K+
Q1	Monthly Newsletter	Invitation to Volunteer/Tour	Invitation to Event	Oped Celebrating support	Honorary Club Member
Q2	ABGC Waterbottle	Birthday Card from Club	Donor Profile Social Post	Birthday Card from Kids	Birthday Card from Kids
Q3	"I Donated" Car Decal	Shirt for a Member/Donor	ABGC Tote Bag	Personal Video Card	Great Futures Storybook
Q4	Friendship Bracelet	Member Artwork	Member Artwork	Member Artwork	Invitation to Conference



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LYBUNT LIST

This LYBUNT list from ABGC's CRM includes donors who previously gave over \$1,000. These donors should be prioritized for outreach on the anniversary of their gift with a request to match or exceed their prior contribution. Additionally, provide a clear pathway to convert them into recurring supporters by offering an option to become monthly donors at a level that surpasses their previous annual gift by approximately 25% (e.g., turning a \$1,000 one-time gift into a \$100/month commitment).

Primary Contact	Date of Gift	Total Gift	Primary Contact	Date of Gift	Total Gift
Morgan Blake	5/7/2025	\$100,104	Morgan Blake	12/19/2024	\$3,500
Dana Whitfield	5/7/2025	\$66,228	Dana Whitfield	5/3/2025	\$3,313
Nico D'Amato	6/10/2025	\$42,200	Nico D'Amato	6/8/2025	\$3,213
Riley Vaughn	5/3/2025	\$31,490	Riley Vaughn	5/3/2025	\$2,967
Jordan Mercer	6/11/2025	\$27,099	Jordan Mercer	6/10/2025	\$2,939
Quinn Harrison	5/3/2025	\$16,603	Quinn Harrison	4/15/2025	\$2,781
Drew Callahan	5/12/2025	\$14,286	Drew Callahan	6/10/2025	\$2,705
Avery Kendall	6/13/2025	\$13,355	Avery Kendall	5/3/2025	\$2,685
Cameron Locke	5/3/2025	\$11,200	Cameron Locke	5/3/2025	\$2,675
Spencer Hale	5/30/2025	\$10,910	Spencer Hale	6/9/2025	\$2,555
Tessa Monroe	5/3/2025	\$10,490	Tessa Monroe	5/3/2025	\$2,540
Sienna Grant	5/12/2025	\$10,000	Sienna Grant	5/14/2025	\$2,500
Logan Pierce	5/15/2025	\$10,000	Logan Pierce	3/18/2025	\$2,500



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SYBUNT LIST

This SYBUNT list includes donors who have given at some point in the past but not in the 24/25 year. These donors represent a warm audience with proven affinity for ABGC and should be re-engaged through personalized outreach that acknowledges their past support and highlights current impact. The goal is to invite them back with a compelling reason to give now, either by matching their highest previous gift or converting them into recurring donors with flexible monthly giving options.

Primary Contact	Last Gift Date	Gift Size	Primary Contact	Last Gift Date	Gift Size
Morgan Blake	4/27/2022	\$103,392	Morgan Blake	10/7/2021	\$1,000
Dana Whitfield	1/10/2022	\$10,000	Dana Whitfield	1/23/2020	\$1,000
Nico D'Amato	12/20/2023	\$9,563	Nico D'Amato	10/7/2021	\$993
Riley Vaughn	5/5/2020	\$5,253	Riley Vaughn	1/14/2020	\$971
Jordan Mercer	11/7/2023	\$5,000	Jordan Mercer	6/15/2021	\$957
Quinn Harrison	12/2/2020	\$3,875	Quinn Harrison	6/7/2022	\$942
Drew Callahan	8/22/2023	\$3,705	Drew Callahan	11/27/2023	\$931
Avery Kendall	10/7/2021	\$3,460	Avery Kendall	9/21/2021	\$926
Cameron Locke	3/23/2023	\$3,000	Cameron Locke	5/4/2023	\$885
Spencer Hale	12/31/2023	\$2,500	Spencer Hale	12/31/2022	\$882
Tessa Monroe	2/4/2020	\$1,976	Tessa Monroe	9/30/2021	\$866
Sienna Grant	10/19/2022	\$1,934	Sienna Grant	9/30/2021	\$840
Logan Pierce	8/22/2021	\$1,800	Logan Pierce	8/7/2023	\$791
Devon Shaw	7/26/2021	\$1,800	Devon Shaw	2/28/2024	\$786
Michael Wood	11/20/2023	\$1,700	Michael Wood	11/20/2023	\$766



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PROSPECTING LIST

This prospecting list includes individuals identified through research on other nonprofits, events, and boards who have not yet given to ABGC but show strong alignment with our mission and community. The most effective way to engage them is by leveraging board member connections. I recommend hosting a board workshop to identify relationships and create targeted outreach strategies for donor acquisition.

Morgan Blake

Born & raised in REDACTED, Judge Gee has been deeply involved in youth development through scholarship programs, mentoring, PTA and youth basketball boards, and REDACTED Free Library Foundation leadership.

Dana Whitfield

Former REDACTED resident and longtime board member of Girls Inc. of REDACTED County. She has played leadership roles in youth empowerment, education and health advocacy.

Nico D'Amato

Youth mental health advocate and 2023 inductee into the REDACTED County Women's Hall of Fame recognized for her work with local youth.

Jordan Mercer

Co-founder and vice president of Friends of Children with Special Needs in REDACTED County; recognized as a community leader supporting youth with disabilities.

Drew Callahan

Founder of the Raising Leaders program in REDACTED/Hayward and educator; inducted into the Women's Hall of Fame in 2023 for youth-focused educational efforts.

Avery Kendall

REDACTED County Women's Hall of Fame inductee and co-founder of GRID Alternatives, which provides solar job training and youth workforce development in low-income communities in REDACTED County.



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2025 RD ASSESSMENT



COMMUNITY ENGAGEMENT CALENDAR

1 : Fiscal Year Start
4: Clubs Closed

JULY 2025						
S	M	T	W	T	F	S
		1	2	3	4	5
7	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

JANUARY 2026						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Social Focus
11 : First Days of School
18: Board Member Spotlight
25: Staff Spotlight
Campaign Focus
Monthly Parent Campaign

AUGUST 2025						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

FEBRUARY 2026						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

Social Focus
1 : Labor Day Post
2: National Literacy Month
15: Hispanic Heritage Month (Sp)
17-19: BGCA Pacific Conference
Campaign Focus
Monthly Parent Campaign

SEPTEMBER 2025						
S	M	T	W	T	F	S
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

MARCH 2026						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Social Focus
6: Impact Magazine
13: Board Spotlight
20: Staff Spotlight

OCTOBER 2025						
S	M	T	W	T	F	S

APRIL 2026						
S	M	T	W	T	F	S



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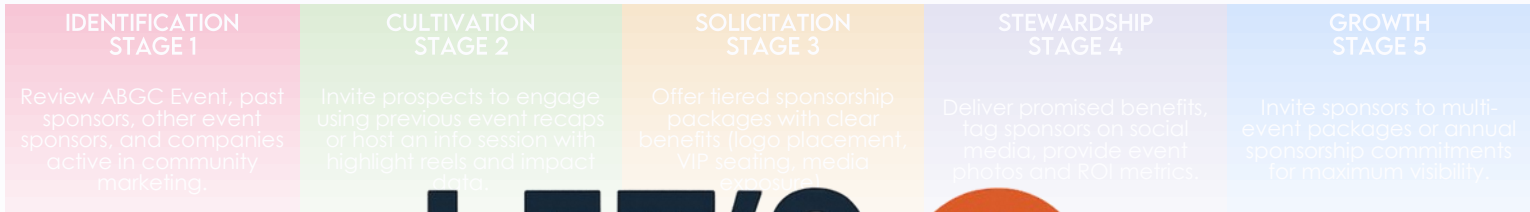
CORPORATE ENGAGEMENT CYCLE HOW WE ACQUIRE NEW SPONSORS AND EXPAND THEIR GIVING

To grow corporate support, we'll adopt a five-stage engagement lifecycle to guide companies from initial connection to sustained partnership. This approach ensures every sponsor experiences intentional, mission-aligned touchpoints that demonstrate impact and value, shifting from transactional sponsorships to strategic, long-term collaboration.



EVENT SPONSORSHIP ENGAGEMENT PLAN

Secure corporate partners for signature events (e.g., Gala, Golf Classic) with strong brand visibility and community engagement opportunities.



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EVENT SPONSOR FORMAT

	PRESENTING SPONSOR \$25,000	CORPORATE SPONSOR \$10,000	EVENT SPONSOR \$5,000	BREAKFAST SPONSOR \$2,500	YOUTH SPONSOR \$1,000
Feature article or interview in event program	●				
Opportunity to deliver a welcome address	●				
Framed shirt signed by all youth candidates	●				
Behind-the-scenes access to meet finalists and judges	●	●			
Exclusive logo placement on trophies or certificates	●	●			
Featured in group thank-you post-event press release	●	●			
Featured in post-event video and photos	●	●			
Thank-you card signed by all youth candidates	●	●			
Tiered Logo recognition in press releases/announcements	●	●	●	●	●
Tiered Logo/Name Recognition on all event materials	●	●	●	●	●
Tiered Logo/Name recognition on print materials/program	●	●	●	●	●
Tiered Logo/Name email campaigns	●	●	●	●	●
Tiered Logo/Name recognition on digital materials	●	●	●	●	●



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CORPORATE PROSPECTING LIST

This prospecting list includes companies headquartered in or strongly connected to REDACTED, identified through research on other nonprofits, community events, and corporate giving activities. While some of these organizations have not yet partnered with ABGC, their presence and alignment with our mission make them strong candidates for sponsorship and engagement.

Company Name	Headquarters	Industry	Focus Area
Summit Energy Cooperative	REDACTED, CA	Utilities	Energy education, community health
UrbanVista Architects	REDACTED, CA	Architecture & Design	Arts education, sustainability
NanoCore Technologies	REDACTED, CA	Clean Energy Tech	STEM, sustainability
Ironwood Brewing Company	REDACTED, CA	Beverage	Community events, youth justice
HarborPoint Health Network	REDACTED, CA	Healthcare	Youth health access
Luminex Medical Systems	REDACTED, CA	Medical Devices	STEM, health access
Crestline Dynamics	Oakland, CA	Consumer Goods	Education, community health
Pacifica Wellness Group	Oakland, CA	Healthcare	Health equity, youth health
Aurora Media Labs	Oakland, CA	Tech / Media	Arts, youth music programs
Bayport Logistics	Oakland, CA	Logistics	Workforce, youth jobs
Heritage Capital Bank	Walnut Creek, CA	Banking	Community development, youth financial literacy
BrightGrid Energy Solutions	Oakland, CA	Energy	Green education
NovaGenics	REDACTED, CA	Medical Devices	STEM, health access
Eterna Life Sciences	REDACTED, CA	Biotech	STEM, health access



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