



Annual Plan and Regional Goal Setting

Chapter/Region Name:

FY19 Planning

Current date:

Respondent:

Respondent email:

National Goal of 1,000 members by June 30, 2020

Growth Model*:

TIFFANY CIRCLE GROWTH PLAN	Targets		Close Rate		Membership Forecast		
	FY19	FY20	FY19	FY20	FY18	FY19	FY20
Tiffany Member Sources							
Prior YE Members/Retention	835	939	90%	90%		752	845
Board Member Upgrades (\$5,999 - \$9,999)	188	200	5%	7%		9	14
Board Visionary Conversions (no revenue)	310	320	5%	7%		16	22
Current Members Recruit New Members	825	900	15%	20%		124	180
Clara Barton Gold Upgrades	700	800	3%	5%		21	40
Clara Barton Gold Disaster	750	500	2%	2%		15	10
New \$10k Donor Conversions	20	20	15%	15%		3	3
TOTAL	3628	3679			835	939	1115
% Year over Year Growth						12%	19%
Avg Gift Size/Revenue			\$12,000	\$12,000	\$ 11,655,631	\$11,269,800	\$13,375,620
# of Chapters (illustrative)			52	55			

***Strategic Plan Pathway to support model is attached.**

Financial Goals

- Set a Tiffany Circle dollar goal of _____ for FY19
- Establish expense budget based on Fund Development Planning Schedule

Membership Goals for Region

- I. Achieve Tiffany Circle Membership Total of _____ (insert number) women
(Add numbers from Goal II, III and IV to achieve Goal I)
- II. Retain _____ % (or 90%) of existing members (if applicable): _____ (insert number) renewing members
- III. Recruit _____ (insert number) new women for membership through the following community chapters:
 - Chapter 1: # of members: _____
 - Chapter 2: # of members: _____
 - Chapter 3: # of members: _____
 - Chapter 4: # of members: _____



Chapter 5: # of members: ____
Chapter 6: # of members: ____
Chapter 7: # of members: ____

- IV. Share opportunities for donors to achieve higher levels of cumulative giving and stewardship:
- Invite ____ (insert number) women for Bonnie McElveen-Hunter Membership
 - Invite ____ (insert number) women for Bonnie McElveen-Hunter Silver Membership
 - Invite ____ (insert number) women for Bonnie McElveen-Hunter Gold Membership
 - Invite ____ (insert number) women for Bonnie McElveen-Hunter Platinum Membership

Giving Level Goals

Annual Gifts:

- \$10,000 = ____ (number of women giving at this level)
- \$25,000 = ____ (number of women giving at this level)
- \$50,000 = ____ (number of women giving at this level)
- \$75,000 = ____ (number of women giving at this level)
- \$100,000 = ____ (number of women giving at this level)

Cumulative Gifts:

- \$100,000 ____ (number BMH Members, number of Tiffany women that have cumulatively given at this level)
- \$250,000 ____ (number of BMH Silver {BMHS} Member Tiffany women that have cumulatively given at this level)
- \$500,000 ____ (number of BMH Gold {BMHG} Member Tiffany women that have cumulatively given at this level)
- \$750,000 ____ (number of BMH Platinum {BMHP} Member Tiffany women that have cumulatively given at this level)

Cultivation/Solicitation Goals

- I. Identify and rate ____ (insert number) women as potential members (using 6-1 ratio, meaning 6 women asked to join to achieve one new member)
- II. Engage at least 33% of the existing members = ____ (insert number) women in identification of prospects and invitations to new women to join Tiffany Circle. Invite them to identify 3 prospects each, and personally invite them.
- III. Commit to 7 contacts per prospect
- IV. Host a minimum of 2 or ____ (insert number) cultivation/solicitation events with appropriate follow-up solicitation strategies



Goals for Engagement and Stewardship

- I. Organize ____ (1 or more) mission-driven sessions for Tiffany Circle members and/or Tiffany Circle prospects around the national programmatic focus (home fire, fleet) or local preparedness events. Track past participation and goals for FY19 for each:

Current Members Participating _____ / Goal of Members Participating _____
- II. Increase Red Cross stewardship for existing members and prospects by ongoing message strategies and activities reinforcing the major area of _____ as a theme for Tiffany Circle
- III. Creation of Bracelet/Charm Presentation Event plus ____ (insert number) additional event(s) for membership engagement
- IV. Achieve ____ (insert number) % of members in attendance and involvement with the Disaster Symposium scheduled on October 12, 2018.

Sponsorship Goals

- I. Local Sponsorships of Tiffany Circle Program
 - Commit to getting ____ (insert number) local sponsorships for a dollar amount of ____ (insert number). Ex: South Florida has a regional sponsor in BNY Mellon. They make a \$50,000 gift to the region in exchange for visibility at regional TC events.