SHANTI PROJECT:

DEVELOPMENT PLAN FOR 1990-1991

Eric E. Rofes
Executive Director

Robbie Fabian
Director of Finance and Development
Introduction

Shanti Project will raise $3.28 million during the 1990-1991 fiscal year from a variety of sources: individual donations, grants from government, foundations and corporations, gifts from major donors, events, direct mail appeals and a contract with the United Way, as well as bequests, sales of products, and rent fees.

The goals of our development and fundraising efforts for the year are:

1. Bring in $3.28 million in revenue through a manageable, planned process

2. Begin to institutionalize an annual development plan and create events and campaigns which can be institutionalized and expanded annually

3. Create improved systems for acquiring new donors, and tracking giving history

These goals will be achieved through the combined efforts of staff, Board and volunteers. The Executive Director and Director of Development will spearhead these efforts, working closely with the Board Chair and the Chair of the Board Development and Public Relations Committee. The Board Development and Public Relations Committee will meet monthly to oversee the progress of staff efforts, steer future efforts and provide contacts, expertise and assistance for campaigns.

Three subcommittees of the Board Development and Public Relations Committee will provide a structure for closer participation in specific efforts: the Public Relations Subcommittee, Major Donor Subcommittee and the Events Subcommittee (including the Annual Dinner).

Shanti Project is at a point of readiness for a planned development effort. After enduring considerable public controversy and internal crisis during 1988-1989, the organization restructured and saw renewed energy during 1989-1990. This same period saw the introduction of strong internal fiscal controls and the beginnings of financial stability. With renewed good will from the public, a Board and Executive Director who have worked together for over a year, and a shift from crisis management to planning, the agency is looking towards a year of reasonable development and strengthened fundraising efforts.
There are 13 key areas for Shanti's efforts in development and fundraising in 1990-1991. Seven of these areas have been targeted as priority areas for the year. These areas are seen as critical potential growth line items in our revenue budget, meriting increased resources and energy during this year:

1. Major Donor Campaign
2. Corporate and Foundation Grants
3. Events
4. United Way
5. Government Funding
6. Direct Mail Campaign
7. Donor Acquisition Campaign

Six additional areas will be focused upon during the year. These secondary areas are also seen as important development efforts, yet with less immediate potential for growth than priority items:

1. Bequests
2. Telephone Campaign/AIDS Fundraising Line
3. General Donations
4. Sales
5. Rent
6. Fees/Reimbursement for Services

This Development Plan aims to present an overview of each of our 13 methods of raising funds during 1990-1991 and includes specific goals and methods to be utilized in achieving the successful achievement of our goals. A detailed addendum is included for four priority areas: Major Donor Campaign, Corporate and Foundation Grants, Events and Direct Mail Campaign. Finally, a timetable for the year is included which charts key campaigns and events.

Priority Areas for 1990-1991

A. Major Donor Campaign

Our budget projects income of $220,000 from gifts from major donors ($500+) during 1990-91. In planning and projecting the campaign for the year, we recognize the initial attempt to develop a systematized approach during 1989-1990 and our failure to provide strong management, find active leadership and fully institutionalize our efforts. At the same time, we acknowledge that the campaign was successful in attracting over 300 major donors and is expected to reach its goal of $250,000 by November, 1990. We intend to learn from our mistakes and build on
our successes.

Key to our Major Donor Campaign efforts this year will be:

- The strengthening of the Major Donor Subcommittee to include 10 individuals, including a Board member to serve as Chair, additional Board members, and key members of the community. The committee will be charged with prospecting, cultivating donors, asking for gifts and maintaining relationships with donors and will be staffed by the Director of Development.

- Training for members of the Major Donor Subcommittee and other interested Board members will take place during September-October.

- A renewed system of remuneration for donors, building on our successful gratitude luncheons, aimed at expressing appreciation, providing networking opportunities among donors, and bonding donors more closely to the Project.

The first months of the year (July-October) will see a wrap-up of last year's campaign. During this time the Major Donor Subcommittee will focus on training, preparation for next year's campaign, and an analysis of research on active major donors. The new campaign will be launched in November with a goal of $275,000, a slight increase over last year's goal reflecting conservatism as well as acknowledgement of an especially large gift during '89-'90 which would be difficult to match annually.

An effort will take place in November and December to win year-end donations from Major Donors. The second half of the year will see the Subcommittee meeting monthly to develop new prospects, plan gratitude events, and monitor the campaign's achievement.

A gratitude luncheon will be held quarterly for groups of major donors. Top-level donors will also be invited to a special dinner hosted by the Board Chair.

Information on specific target goals for the new campaign, remuneration items for specific levels of donors and additional information is available in Addendum A.

B. Corporate and Foundation Grants

The projected income goal for corporate and foundation grants is $309,000 for '90-'91. We have put in place an extensive solicitation plan (see Addendum B) which builds on Shanti's successful history of winning grants
as well as the experience and strengths of Shanti's Executive Director and Grantswriter.

Our strategy for the year focuses primarily on corporations and foundations with a history of giving to Shanti Project. We aim to strengthen contact, specifically target proposals to key program areas and increase the level of giving from funding sources.

The key areas of program development for which we will seek grants are:

- Expanding the PWA Activities Program
- Developing a Program for Women, Children and Families
- Creating a Client Services Director position
- Funding the Coordinator of Community Trainings
- Expanding Support for the Practical Support and Emotional Support Networks
- Continuing the second year of our Multicultural Plan

We have targeted ten granting sources as a focus for energies for the year:

1. Columbia Foundation
2. Kaiser Family Foundation
3. San Francisco Foundation
4. PG&E
5. Bank of America
6. AT&T
7. Irvine Foundation
8. Cowell Foundation
9. Northern California Grantmakers
10. Disability-oriented foundations

This list reflects foundations whose current interest areas match our own and which have the potential to fund new projects because of their innovative style of funding, connections to Shanti Project, or past history of giving.

C. Events

Our budget projects income of $250,000 from special fundraising events this year. In planning and projecting these events, we aim to build on past successes and create new events targeted at specific populations which could become annual events for the Project. The prime goal of our fundraising events is to bring in revenue; an important secondary goal is to enhance the public image of the Project.
Key to our event planning this year:

- We aim for a mixture between events produced inhouse by staff/volunteers and events produced externally of which Shanti is a beneficiary. Occasionally, we will produce an inhouse event with assistance from a paid consultant.

- Events listed in Addendum C are categorized by estimated net profit as either "Major" (4 events planned raising at least $30K each), "Intermediate" (5 additional events raising at least $10K each), and "Small" (events raising below $10K each).

- Whenever possible, we will target events as benefitting specific Shanti services. This is intended to attract specific individuals to the event, as well as increase public understanding of the scope of our services.

Events will be overseen by the Director of Development and one of four people on staff will take the lead on each major or intermediate event: the Executive Director, Director of Development, Events Coordinator or the Director of Special Projects. Key events for the year include:

1. **Aid and Comfort II.** (September)
2. **Making Every Day Count** (October)
3. **Home Is Where the Heart Is** (February)
4. **Ballet/Symphony/Opera Premiere Benefit** (May)

Addendum C contains specific information on all events planned for '90-'91, as well as information on staff members who will oversee the event, estimated net profit, and target audience.

D. **United Way**

Our budget projection for United Way revenue is set at $373,000. We have received contract confirmation for the '90-'91 year of $372,000 from the United Way of the Bay Area.

From this base commitment we have added $6,000 to account for designations from other counties, based on historical data.
As part of our goal of achieving greater designations for Shanti in this fall's campaign—as well as part of our strategy for our next 3-year contract—the Development Department will gear up for a strong presence in this fall's United Way speaking engagement campaign. Over 25 staff members, volunteers and clients will be trained and sent to corporations as speakers. Shanti is one of only 5 agencies chosen as the subject for the major campaign promotion and advertising in this year's campaign.

Much effort will take place this year in establishing our next 3-year contract. Our goal is to have a contract in place by March with a substantial increase (100%) of commitment from United Way. We will continue to work with the San Francisco AIDS Foundation on these efforts and our strategy will include:

- Establishing strong relationships with the new President of UWBA
- Have a strong presence in this year's campaign
- Present cogent, compelling material verifying client need, government funding limits and cost-efficiency of our services

Shanti's United Way Negotiations Team will include the Chair of the Board, Executive Director and Director of Development. The Chair of the Board Public Relations & Development Committee will provide insights and experience as we develop our specific strategy for meetings.

E. Government Funding

Our goal for the year is to increase our government funding from $1,294,000 to $1,347,000, an increase of about $53,000. While state and city cutbacks have made this a precarious time for AIDS funding, we expect our current programs to receive level funding and we have won additional funding of $37,000 for home care training. Additional increases are expected as cost-of-living increases or expanded funding for volunteer services.

The Executive Director will devote considerable time to continuing to strengthen relations with the AIDS Office and will work in an advocacy capacity in San Francisco, Sacramento and Washington, D.C. on three specific initiatives for future expanded funding:

- The Ryan White Bill (formerly Kennedy/Hatch) which could bring $25 million to San Francisco this year.
- AIDS Subsidies Housing Bill which passed Congress, is awaiting Presidential action, and could sustain a Presidential veto. Funds for
'91-'92 would come from this initiative.

- Omnibus Housing Bill authored by Senator Cranston will also include AIDS-targeted housing funding—passage in 1991 is possible. Funding would come likely near mid-1990s.

F. Direct Mail Campaign

Shanti has established a successful direct mail campaign during 1989-1990, including five targeted letters, an expanded list with improved accuracy, and establishment of a relationship with a leading direct mail firm (Mal Warwick).

The goal for the year is $210,000. Addendum D provides specific projection breakdown and strategy for letters for the year.

G. Donor Acquisition Campaign

The '90-'91 budget projects revenues of $80,000 from donor acquisition. The donor acquisition campaign is an effort to sustain the active donor base of the Project by adding new active names to the general support base. Industry statistics show that the most effective approach for donor acquisition is direct mail appeal.

The new campaign will have one mail drop this fall to 100,000 new names from at least 10 lists including:

- American Conservatory Theatre
- California Nurses Association
- UC Berkeley Wellness List
- Visa/Socially Responsible Investors
- Other AIDS Groups

Last year's $40 average donation will be used in the forecasting process. Despite the fact that the response rate last year was higher than the expected 2%, this same level will be used for the 1990-1991 projections:

\[
\begin{align*}
100,000 \text{ letters} \times 2\% \text{ response} &= 2,000 \text{ responses} \\
2,000 \text{ responses} \times 40 &= 80,000 \text{ revenue}
\end{align*}
\]

Secondary Areas for 1990-1991

A. Bequests

The Project will bring in $185,000 from estates this year. This is a conservative projection based on last year's actual income ($254,000) and we already know of several
estates heading our way. Efforts in this area will focus on beginning formal discussions of developing a formalized estate planning/bequest program either agency-specific or in consort with other groups. Initial discussions have taken place with knowledgeable individuals at other AIDS groups, as well as key foundations.

After the discussions, planning should take place (beginning in January) for a project to begin during 1991-1992.

B. Telephone Campaign/AIDS Fundraising Line

We are projecting a $65,000 goal for our four month campaign—or $16,250 per month.

This year, the Telephone Campaign will be used by the Development team as a resolicitation tool. The goal will be to increase the response rate to the direct mail effort, upgrade the levels of gifts from current donors, and to reinstate donors who have stopped giving. The existing active and lapsed donor lists will be used in this prospecting effort.

Our projection of $65,000 is about 12% more than the total donations received from the past year's campaign. This percentage equals the total unrealized pledges for the year (pledges promised but never sent). With the proposed aggressive donor acquisition plan and special events schedule, this increase in projection can still be considered conservative.

The proposed AIDS Fundraising Line involves producing a 30 second commercial to be aired on local, independent, broadcast and cable stations—and networks during prime time—with a major celebrity spokesperson discussing AIDS. A message running across the screen asks patrons to donate through a 900 number. There is also a possibility of having a caller-interactive donation/info line. We plan airing the commercial during the holiday season (October-December). Because this is a new, untried venture, we have not projected revenue at this time. The entire project will be underwritten by an independent producer.

C. General Donations

We projected a slight increase in general donations, to $107,000 for '90-'91. We expect to focus our energies in this area on increased speaking engagements (December-June) at corporations, communications with survivors after clients die (memorial donations), and advertising during the final quarter of the year.
D. Sales

Efforts in this area will focus on promotion of our products: videotapes, t-shirts and sweat shirts. Special holiday promotions of the shirts will take-place and videotapes will be widely marketed to AIDS groups internationally.

E. Rent

We have projected level funding essentially in this area and expect limited energy placed into this area.

F. Fees/Reimbursements for Service

This item will not realize revenue income during this fiscal year. Essentially we are initiating discussions with companies with expertise in reimbursement for specific home care services, in the hopes that clients and the agency might be reimbursed for assistance from the organization.

Staff believes this is an area requiring sensitivity and also thinks that over the next few years, consideration of client fees (when possible) to receive services is essential.

Conclusion and Prospects for the Future

This planning document presents a prioritization of our energies and resources for the coming year. We recognize that Shanti Project is at a particular opportunity time for resource development: we are seen as clearly focused on AIDS service delivery, our management is stable, our public image in on the rise. By focusing our efforts in key areas, we believe we can reach our revenue goals for the year and begin the institutionalization of these efforts.

A key component of successful development is absent from this plan: a public relations strategy. We are heartened by the initial meetings of the Public Relations Subcommittee and hope to see a clear plan sometime during this fiscal year. While we would like to see aggressive public relations begin for Shanti Project as soon as possible, we want to see research completed, tactics and positioning debated, and careful planning take place before concerted efforts and resources are focused on public relations. Such a campaign would further boost our fundraising and development issues and is at the core of our optimism for '91-'92.
Finally, the achievement of our third goal for the current year—improved systems for donor expansion and tracking—will include more than the efforts listed above. During the fall, we intend to explore the systems currently in use for bringing clients and their friends, families and lovers onto our donor lists. We believe that these individuals—as well as volunteers—represent a key untapped source of financial revenue to the Project and intend to work to improve our ability to field contributions from this target audience.

[Signature]
Eric E. Rosés
Executive Director

[Signature]
Robbie Fabian
Director of Finance and Development
CALENDAR

1990-1991

July
Draft Development Plan
Major Donor Luncheon

August
Complete Development Plan
Major Donor Luncheon

September
Major Donor Luncheon
Begin Major Donor Subcommittee Training
Begin United Way Speaking Engagements
Begin Telephone Campaign
Direct Mail #1
AID AND COMFORT II.

October
Complete Major Donor Training
United Way Speaking Engagements
Telephone Campaign
Begin AIDS Fundraising Line
MAKING EVERY DAY COUNT II.

November
United Way Speaking Engagements
Telephone Campaign
AIDS Fundraising Line
Direct Mail #2
MAJOR DONOR CAMPAIGN KICKOFF
HOLIDAY AUCTION

December
Complete United Way Speaking Engagements
Complete Telephone Campaign
Complete AIDS Fundraising Line
Direct Mail #3

January

Major Donor Luncheon
Begin Donor Acquisition Campaign
Begin Development Plan for '91-'92

February

Donor Acquisition Campaign
Complete Development Plan for '91-'92
HOME IS WHERE THE HEART IS

March

Complete United Way Negotiations
Complete Donor Acquisition Campaign
Direct Mail IV.

April

Major Donor Luncheon
Begin City RFP Process
AIDS FILM FESTIVAL
BIKE-A-THON

May

City RFP Process
MAJOR DONOR DINNER (Top Donors)
PREMIERE BENEFIT
COUNTRY CARES

June

GARDEN PARTY
Direct Mail V.
Complete City RFP Process
ADDENDUM A: MAJOR DONOR CAMPAIGN

For the 1990-1991 Campaign, beginning November, 1990, we are projecting the following number of donors at our major donor tiers:

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>LEVEL OF DONATION</th>
<th># GIFTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Platinum Tier</td>
<td>$50,000+</td>
<td>1</td>
</tr>
<tr>
<td>Diamond</td>
<td>$25,000-$49,999</td>
<td>1</td>
</tr>
<tr>
<td>Gold</td>
<td>$10,000-$24,999</td>
<td>6</td>
</tr>
<tr>
<td>Emerald</td>
<td>$5,000-$9,999</td>
<td>12</td>
</tr>
<tr>
<td>Silver</td>
<td>$3,000-$4,999</td>
<td>15</td>
</tr>
<tr>
<td>Crystal</td>
<td>$1,000-$2,999</td>
<td>20</td>
</tr>
<tr>
<td>Bronze</td>
<td>$500-$999</td>
<td>28</td>
</tr>
<tr>
<td>Total:</td>
<td>$275,000</td>
<td></td>
</tr>
</tbody>
</table>

We believe these projections are conservative, based on the previous year's actual income. Please note that we are targeting fewer donors this year, but at a greater income level. This is to focus our energies on maintaining relations with fewer donors.

The remuneration for categories for the new campaign will appear as follows:

a) High End Major Donors: Platinum, Diamond and Gold Tiers
   - Invitation to Special Board Chair-hosted Dinner
   - Acknowledgement and listing in Annual Dinner Program
   - Acknowledgement and listing in Annual Report
   - Invitation to donor luncheon for donor and guest
   - Invitation to Annual Campaign Kickoff
   - Acknowledgement in ECLIPSE
   - Name on Campaign Plaque in Shanti lobby
   - Naming of a room, residence or special fund in donor's honor (Platinum and Diamond Tiers only)

b) Medium Level Major Donors: Emerald and Silver Tiers
   - Acknowledgement and listing in Annual Dinner Program
   - Acknowledgement and listing in Annual Report
   - Invitation to donor luncheon for donor and guest
   - Invitation to Annual Campaign Kickoff
   - Acknowledgement in ECLIPSE
   - Name on Campaign Plaque in Shanti lobby
c) Low End Major Donors: Crystal and Bronze Tiers

- Acknowledgement and listing in Annual Dinner Program
- Acknowledgement and listing in Annual Report
- Invitation to donor luncheon for donor and guest
- Invitation to Annual Campaign Kickoff
- Acknowledgement in ECLIPSE
ADDENDUM B

1990/91 FOUNDATION AND CORPORATION SOLICITATION PLAN

I. Goal

The projected income goal to be raised via Foundations and Corporation solicitations for FY 90/91 is $309,000.

II. Overall Strategies for the Coming Year

1) Shooting for a "good" ratio of 3:1 (for every three grants submitted one is funded). Foundations will be targeted for appropriate submissions only - not as many long shots. This also means that education must go on at all levels of the organizations as to what is appropriate for foundation funding when determining priorities.

2) Looking for multi-year grants (e.g. $100,000 over 3 years) and corresponding programs to match.

3) Putting all local foundations on a three year cycle, once a grant has been awarded, followed by a year off (e.g. $20,000 year one, $15,000 year two and $10,000 year three, next year $0 the following year a new program would be submitted) and educating them about this expectation.

4) Increasing the average grant funded from $5,000 to $10,000.

5) Start to use our Board's resources (contacts) to develop prospects within foundations and corporations to assist in getting grants funded and educating foundations about why funding AIDS program through this fundraising vehicle is necessary.

6) At this point the plan does not include foundations which would be new prospects for funding. They will be included later.

III. Program Area Priorities

1) Expansion of the PWA Activities Program by 50%. Includes increased staffing (1/2 time secretary) and increased scholarship. +$50,000

   a. Looking for one large foundation grant in $75,000 range to work in conjunction with other AIDS activities programs.

   b. Corporate sponsorship has some potential, would need to educate funders.
c. All grants received without a designation (general) would be added into this program category.

2) Funding the Manager of Community Trainings position and other program related expenses to continue to oversee community participant trainings and other non-ES/PS Shanti trainings. $24,500
   a. This program has the best potential for bringing in the most money (approx. $75,000) by marketing national and international trainings.

3) Creation of Director of Client Service Position to oversee five service programs, programmatic quality assurance and service expansion. $38,000

4) Development of Program for Women, Children and Families would involve expansion of current position coordinating the family residence and allow Shanti to strongly participate in family advocacy and system planning to ensure service to an inadequately served population. $10 - 20,000
   a. Foundations which target only women are faltering and granting smaller amounts each year. Education needs to be done about the increasing effects on how AIDS impacts women and children within the more mainstream foundations that have youth components.

5) Corporate Support of PS and ES Networks. $20,000
   a. Strong commitment already in hand from one major company; would need to use it to leverage others - matching/challenge potential.

6) ES Support Groups for target populations. undetermined
   a. Renew at a reduced rate current foundations funding this program.

7) Expansion of PWA Newsletter. undetermined
   a. Market as a P.R. tool for corporations.

8) Continued support for Multicultural Affairs. $100,000
   a. Renew at current level for year two.
IV. Carry-Over from FY89/90

The following is a list of outstanding requests from FY89/90 and should be included in this year's plan if received. Totals approx. $217,000 in requests.

<table>
<thead>
<tr>
<th>Foundation</th>
<th>$ Amount</th>
<th>Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bridges</td>
<td>10,000</td>
<td>24 hr care</td>
</tr>
<tr>
<td>Buffett</td>
<td>10,000</td>
<td>24 hr care</td>
</tr>
<tr>
<td>Callison</td>
<td>5,000</td>
<td>Residence</td>
</tr>
<tr>
<td>Chevron</td>
<td>10,000</td>
<td>24 hr care</td>
</tr>
<tr>
<td>Cowell</td>
<td>20,000</td>
<td>24 hr care</td>
</tr>
<tr>
<td>Crecent Porter Hale*</td>
<td>10,000</td>
<td>24 hr care</td>
</tr>
<tr>
<td>Cecil B. DeMille</td>
<td>5,000</td>
<td>Family Residence</td>
</tr>
<tr>
<td>Friend Family</td>
<td>2,000</td>
<td>Family Residence</td>
</tr>
<tr>
<td>Furth</td>
<td>5,000</td>
<td>Deaf Training</td>
</tr>
<tr>
<td>Goldman*</td>
<td>25,000</td>
<td>24 hr care</td>
</tr>
<tr>
<td>E. and W. Haas</td>
<td>25,000</td>
<td>PS Network</td>
</tr>
<tr>
<td>Herbst</td>
<td>5,000</td>
<td>Deaf Training</td>
</tr>
<tr>
<td>Ins. Indust. AIDS</td>
<td>25,000</td>
<td>Family Residence</td>
</tr>
<tr>
<td>Jr League</td>
<td>5,000</td>
<td>General</td>
</tr>
<tr>
<td>Lyda-Rico</td>
<td>2,195</td>
<td>Deaf Training</td>
</tr>
<tr>
<td>Mariani</td>
<td>2,195</td>
<td>Deaf Training</td>
</tr>
<tr>
<td>Packard</td>
<td>5,000</td>
<td>Deaf Training</td>
</tr>
<tr>
<td>Page*</td>
<td>1,000</td>
<td>Family Residence</td>
</tr>
<tr>
<td>PCS</td>
<td>10,000</td>
<td>3rd Van</td>
</tr>
<tr>
<td>Pfeiffer-Odell</td>
<td>5,000</td>
<td>Deaf Training</td>
</tr>
<tr>
<td>Radin</td>
<td>5,000</td>
<td>Deaf Training</td>
</tr>
<tr>
<td>SF Examiner Charities*</td>
<td>5,000</td>
<td>Family Residence</td>
</tr>
<tr>
<td>Santa Fe Pacific Realty</td>
<td>10,000</td>
<td>Family Residence</td>
</tr>
<tr>
<td>Schmidt</td>
<td>2,195</td>
<td>Deaf Training</td>
</tr>
<tr>
<td>US Leasing</td>
<td>7,500</td>
<td>24 hr care</td>
</tr>
</tbody>
</table>

* Denotes a foundation likely to fund the project.

Note: Target amount from these foundations is $70,000.
## Submission Dates By Month

<table>
<thead>
<tr>
<th>Month</th>
<th>Organization</th>
<th>Target Amt</th>
<th>Program Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>July</td>
<td>Crescent Porter Hale</td>
<td>$10,000</td>
<td>24 hr care</td>
</tr>
<tr>
<td></td>
<td>Apple Computer</td>
<td>In-Kind</td>
<td>PWA Newsletter</td>
</tr>
<tr>
<td>August</td>
<td>Hewlett-Packard</td>
<td>In-Kind</td>
<td>PWA Newsletter</td>
</tr>
<tr>
<td></td>
<td>Columbia*</td>
<td>$50,000</td>
<td>Int'l Training</td>
</tr>
<tr>
<td></td>
<td>Clorox</td>
<td>$5,000</td>
<td>ES/PS Networks</td>
</tr>
<tr>
<td>September</td>
<td>Magowan</td>
<td>$5,000</td>
<td>W,C &amp; F</td>
</tr>
<tr>
<td></td>
<td>Westinghouse</td>
<td>15,000</td>
<td>Support Groups</td>
</tr>
<tr>
<td></td>
<td>Laine</td>
<td>2,500</td>
<td>PWA</td>
</tr>
<tr>
<td></td>
<td>McKesson</td>
<td>5,000</td>
<td>W,C &amp; F</td>
</tr>
<tr>
<td>October</td>
<td>Rockefeller</td>
<td>$25-30,000</td>
<td>Int'l Training</td>
</tr>
<tr>
<td></td>
<td>Stulsaft</td>
<td>5-7,500</td>
<td>W,C &amp; F</td>
</tr>
<tr>
<td></td>
<td>Chicago Resource Center</td>
<td>15,000</td>
<td>Comm. Training</td>
</tr>
<tr>
<td></td>
<td>P G &amp; E*</td>
<td>15,000</td>
<td>ES/PS Networks</td>
</tr>
<tr>
<td></td>
<td>Toys-R-Us</td>
<td>In-kind</td>
<td>W,C &amp; F</td>
</tr>
<tr>
<td>November</td>
<td>Security Pacific Bank</td>
<td>$1,000</td>
<td>PWA</td>
</tr>
<tr>
<td></td>
<td>Dankin Fund</td>
<td>In-kind</td>
<td>PWA</td>
</tr>
<tr>
<td></td>
<td>Hedco (Renovation)</td>
<td>5,000</td>
<td>Residence</td>
</tr>
<tr>
<td></td>
<td>Irvine</td>
<td>50,000</td>
<td>Multicultural</td>
</tr>
<tr>
<td></td>
<td>Fireman's Fund</td>
<td>5,000</td>
<td>TBA</td>
</tr>
<tr>
<td></td>
<td>(Disabilities)</td>
<td>75,000</td>
<td>PWA</td>
</tr>
<tr>
<td>December</td>
<td>Lane</td>
<td>1,000</td>
<td>ES Support Group</td>
</tr>
<tr>
<td></td>
<td>SF Examiner Charities</td>
<td>5,000</td>
<td>PWA</td>
</tr>
<tr>
<td></td>
<td>Transamerica</td>
<td>10,000</td>
<td>W,C &amp; F</td>
</tr>
<tr>
<td></td>
<td>E. &amp; W. Haas</td>
<td>10,000</td>
<td>PWA/W,C &amp; F</td>
</tr>
<tr>
<td></td>
<td>San Francisco Foundation</td>
<td>40,000</td>
<td>Client Services</td>
</tr>
<tr>
<td>January</td>
<td>Clinton-Walker</td>
<td>$1,000</td>
<td>PWA</td>
</tr>
<tr>
<td></td>
<td>Gerbode</td>
<td>5,000</td>
<td>Tech. Assist</td>
</tr>
<tr>
<td></td>
<td>Page</td>
<td>1,000</td>
<td>W,C &amp; F</td>
</tr>
<tr>
<td></td>
<td>B of A</td>
<td>5,000</td>
<td>PWA Newsletter</td>
</tr>
<tr>
<td></td>
<td>Levi-Strauss</td>
<td>5-10,000</td>
<td>TBA</td>
</tr>
<tr>
<td></td>
<td>Sandy</td>
<td>5,000</td>
<td>PWA</td>
</tr>
<tr>
<td>February</td>
<td>Friedman</td>
<td>$1,000</td>
<td>W,C &amp; F</td>
</tr>
<tr>
<td></td>
<td>Vanguard</td>
<td>5-10,000</td>
<td>PWA</td>
</tr>
<tr>
<td></td>
<td>Lurie</td>
<td>5,000</td>
<td>TBA</td>
</tr>
<tr>
<td></td>
<td>Koret</td>
<td>5,000</td>
<td>W,C &amp; F</td>
</tr>
<tr>
<td></td>
<td>Hearst</td>
<td>5,000</td>
<td>TBA</td>
</tr>
<tr>
<td>Month</td>
<td>Name</td>
<td>Amount</td>
<td>Purpose</td>
</tr>
<tr>
<td>--------</td>
<td>-----------------------------</td>
<td>--------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>March</td>
<td>LEF Skaggs</td>
<td>$5,000</td>
<td>PWA</td>
</tr>
<tr>
<td></td>
<td>W,C &amp; F</td>
<td>10,000</td>
<td></td>
</tr>
<tr>
<td>April</td>
<td>Driscoll</td>
<td>$5,000</td>
<td>PWA</td>
</tr>
<tr>
<td></td>
<td>Wells Fargo</td>
<td>5,000</td>
<td>PWA Newsletter</td>
</tr>
<tr>
<td></td>
<td>Kaiser Family Fund</td>
<td>15,000</td>
<td>Comm. Training</td>
</tr>
<tr>
<td></td>
<td>Bothin</td>
<td>10,000</td>
<td>Capital Purchase</td>
</tr>
<tr>
<td></td>
<td>Gilmore</td>
<td>5,000</td>
<td></td>
</tr>
<tr>
<td>May</td>
<td>Mathew Bender Langendorf</td>
<td>$1,000</td>
<td>PWA</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5,000</td>
<td>ES Support Groups</td>
</tr>
<tr>
<td>June</td>
<td>Horizon</td>
<td>$5,000</td>
<td>PWA</td>
</tr>
</tbody>
</table>

Foundations with no target dates as of yet:

<table>
<thead>
<tr>
<th>Foundation</th>
<th>Amount</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northern Calif. Grantmakers</td>
<td>$20,000</td>
<td>TBA</td>
</tr>
<tr>
<td>Arthur Hill</td>
<td>10,000</td>
<td>Nat'l Training</td>
</tr>
<tr>
<td>Herbst (Renovation)</td>
<td>10,000</td>
<td>Residence</td>
</tr>
<tr>
<td>Ford</td>
<td>TBA</td>
<td>TBA</td>
</tr>
<tr>
<td>Curtis</td>
<td>7,500</td>
<td>PWA</td>
</tr>
<tr>
<td>Mosbacher</td>
<td>10,000</td>
<td>General</td>
</tr>
<tr>
<td>Tides</td>
<td>5,000</td>
<td>TBA</td>
</tr>
<tr>
<td>Brotman</td>
<td>?</td>
<td>PWA</td>
</tr>
</tbody>
</table>

* Indicates a foundation that has given a verbal commitment of this amount.

Note: San Francisco Foundation has already committed to $70,000 over two years.
VI. Breakdown of Foundations per Program Activity

**PWA Activities**
- Gerbode
- Dankin Fund
- SF Examiner
- Toys-R-Us
- Horizon
- Laine
- Clinton-Walker
- Haas
- Driscoll
- Mathew Bender
- LEF
- Brotman
- Vanguard
- Sandy
  (Disabilities)

**Women, Children & Family**
- Skaggs
- Magowan
- Stulsaft
- Mckesson
- Hedco
- Transamerica
- Haas
- Page
- Koret
- Friedman
- Herbst
- Toys-R-US

**TBA**
- Fireman's Fund
- Levi-Strauss
- Lurie
- Hurst
- Gilmore
- Tides
- Curtis
- NorCal Grantmakers
- Ford

**Coor. of Comm. Training**
- Columbia
- Rockefeller
- Arthur B. Hill
- Chicago Resource Center
- Kaiser Family Fund

**Dir. of Client Services**
- San Francisco Foundation
- Moebacher

**Multicultural**
- Irvine
- San Francisco Foundation

**ES/PS Networks**
- Clorox
- P G & E
- Lane

**ES Support Groups**
- Westinghouse
- Langendorf

**PWA Newsletter**
- Wells Fargo
- B of A
- Hewlett-Packard
- Security Pacific
- Apple Computer
ADDENDUM C: EVENTS

Major Events for '90-91

1. **Aid and Comfort II.** is scheduled for September 22, 1990 at UC Berkeley. The event benefits 8 AIDS agencies, including Shanti Project and includes a "Dinner in the Grove" and a Concert in the Hearst Greek Theatre. It is targeted at a general audience; specific outreach to affluent individuals.

Organizers anticipate revenues of $1,000,000 against expenses of $200,000 and expect to contribute $100,000 to each AIDS group. We are projecting $60K revenue from the event.

2. **Making Every Day Count**, Shanti's second annual dinner is scheduled for October 11, 1990 at the Pan Pacific Hotel and will include a reception, dinner and awards ceremony. Tickets are priced at $150 with higher levels to attract corporate giving through table purchase. Target audience is mixed. Current anticipated income is $80,000 and expenses $40,000, for a net revenue of $40,000.

3. **"Home is Where the Heart Is"** Campaign will be a week-long series of events focused on Valentines Day raising funds for Shanti's residence program from low and medium level donors. Included will be a special home party for real estate professionals ($15K income anticipated), a Valentines Day Breakfast ($10K) and a Saturday house tour ($5K).

Simultaneously, Development will launch efforts to recruit major donors ($25K and up) to make memorial donations to the Project and name two of our 14 residences in someone's memory.

4. **Ballet/Symphony/Opera Premiere Benefit** will be a black tie event taking place in May, 1990 in which the Ballet, Symphony or Opera Company will allow Shanti to sell tickets for the premiere night of a major performance. There will be a reception prior to the performance targeting our medium to high-end donors. Anticipated net revenues is $30,000.
Intermediate Events for '90-'91

1. **Holiday Auction** is scheduled for late November. This event will net $10K for the PWA Activities Program. It will be organized by a Committee comprised of program participants and volunteer representatives of a variety of outing a social clubs who will sign on as co-sponsors of the event. Target audience will be members of the clubs and the general community. The event will be held on a Friday night, have a $10 cover charge and include both a silent and floor auction of donated gifts and services with special appeal towards holiday giving.

2. **AIDS Film Festival** will be a five day show in April targeting the following markets: service providers, PWAs, corporate supporters of AIDS causes, and a general outreach to the lesbian/gay and mainstream communities. Target income: $15,000.

3. **Bike-a-Thon** released Shanti as a beneficiary last year but is seriously considering readmitting us after discussions and debate. Event takes place in April and raised $40K for Shanti two years ago. Target income: $25K.

4. **Country Cares** will take place in May and raise $20K for Shanti's Practical Support Program at a Country/Western Barbecue and Dance Concert. It will be organized by a committee comprised of key figures in the local Country Music scene--representatives of businesses, clubs and producers--as well as PS volunteers and clients. A local Country Music station will be recruited early on as a key sponsor who will promote the event and attract a key country star to perform. Target audience will be Country Music fans of all orientations.

5. **Shanti Garden Party** will take place before the Lesbian/Gay Freedom Day and is intended to become seen as a kickoff event for those activities and an annual gay/lesbian fundraiser for Shanti. It will be organized by an annual "Garden Party Committee" comprised of key professional groups. It will take place in an exterior garden location during a week-end day and raise $10K for Shanti's Emotional Support Program.
Small Events for '90-'91

Small events will primarily be low-end events serving to increase our list of donors and give us positive public relations. Events will include:

- Benefit at the SF Eagle (December, $2500)
- Dance-a-thon with Mobilization Against AIDS (December, $2000)
- Benefit for Women's Services with WAN (May, $2500)
- Shanti Day at Candlestick Park
- 6 Variety shows at The Mint
- Movie Opening
- Benefit at The Cinch (August)
ADDENDUM D: DIRECT MAIL

I Rationale:

The goal of the direct mail campaign, aside from raising the projected resources, is to measure, maintain and record the donors who are predisposed to donating via donor letters, how much these people give, and how often they give. As a development tool, direct mail donor letters qualify the donor list in terms of giving patterns thus making it possible for the team to evaluate the most efficient and effective approaches to specific categories of donors.

II Projection Breakdown and Basic Approach:

The budget projects a $210,000 income from direct mail.

There will be five main direct mail drops for fiscal year 90-91 - September, November, December, March and June. In addition, there will be two follow up letters to the September and March letters. The suggested format includes a letter from the Chair of the Board of the Project, one letter from the Executive Director, one from a client, a letter from a hospital counselor and one from a volunteer.

The average income for each direct mail drop is $27,000. This figure is drawn from the best 10,000 direct mail donors of the Project from the last six quarters. The December appeal is an exception for it brings in an average of $70,000. The two follow up letters traditionally increase revenues from the main letter by another $10K or $11K.

<table>
<thead>
<tr>
<th>Letter</th>
<th>Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>September letter</td>
<td>$27,000</td>
</tr>
<tr>
<td>September follow up</td>
<td>11,000</td>
</tr>
<tr>
<td>November letter</td>
<td>27,000</td>
</tr>
<tr>
<td>December letter</td>
<td>70,000</td>
</tr>
<tr>
<td>March letter</td>
<td>27,000</td>
</tr>
<tr>
<td>March follow up</td>
<td>11,000</td>
</tr>
<tr>
<td>June letter</td>
<td>27,000</td>
</tr>
</tbody>
</table>

SUBTOTAL: $200,000

The direct mail campaign draws its donor base from existing donors of the Project. The year 1990-91 will see a more aggressive donor acquisition campaign, a more extensive Development community outreach via speaking engagements and Project tours, and a more elaborate special events/fundraisers schedule. The number of new names to the donor list is expected to increase.
To account for this, a 5% increase in direct mail income, over and above the previous six quarters levels is included in the projections.

<table>
<thead>
<tr>
<th>Subtotal:</th>
<th>$200,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>5% Adjustment</td>
<td>$10,000</td>
</tr>
<tr>
<td><strong>TOTAL:</strong></td>
<td><strong>$210,000</strong></td>
</tr>
</tbody>
</table>