

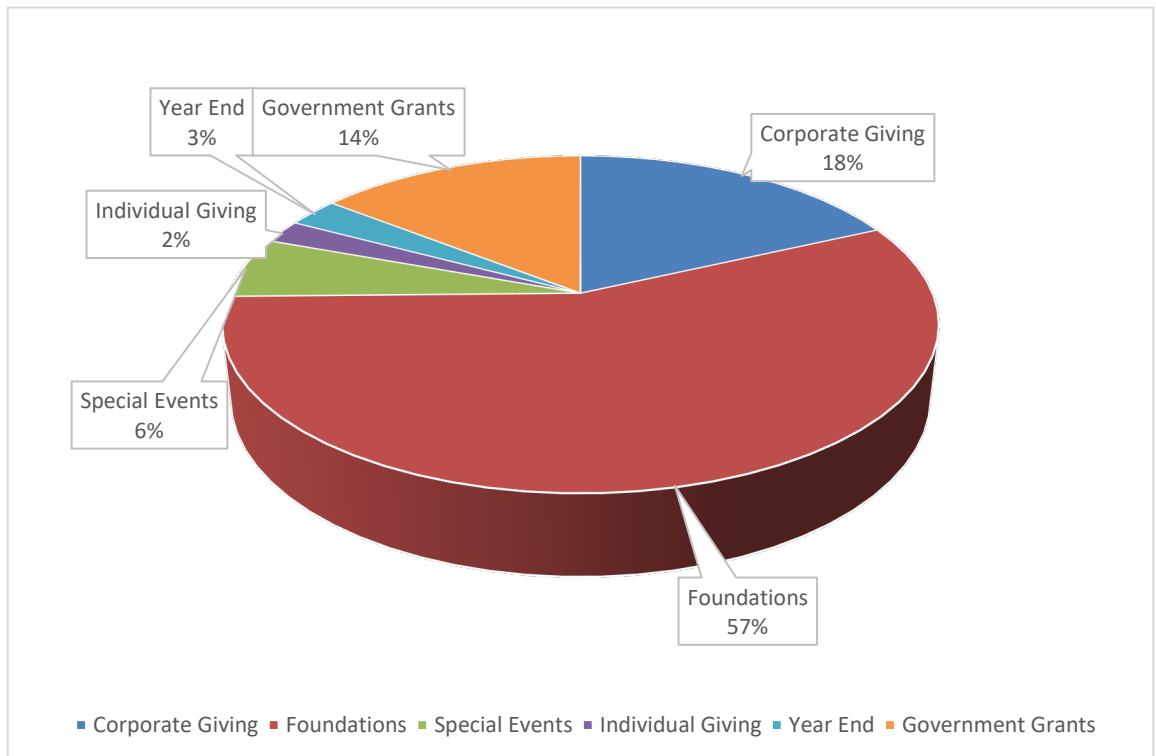


## Development Report: January – December 17, 2024

|                   |                |         |
|-------------------|----------------|---------|
| Corporate Giving  | \$486,000.00   | 18%     |
| Foundations       | \$1,515,387.73 | 57%     |
| Special Events    | \$157,189.50   | 6%      |
| Individual Giving | \$59,769.16    | 2%      |
| Year End          | \$74,592.80    | 3%      |
| Government Grants | \$386,816.50   | 14%     |
| Total             | \$2,679,755.69 | 100.00% |
| 2024 Budget Goal  | \$2,393,565.00 | 12%     |

|                             |            |
|-----------------------------|------------|
| TCJ Endowment Contributions | \$8,187.17 |
|-----------------------------|------------|

### Percentage of Funds Raised By Category January – December 17, 2024



### 2024 Highlights / Recap:

- ✓ Comp year increase of 8% in fundraising revenue (FY24 \$2,679,756 vs FY23 \$2,492,325) with two weeks remaining in the fiscal year.
- ✓ Increase of 25% in year-end contributions to date (FY24 \$74,593 vs FY23 \$56,296)
- ✓ Expanded programming at Oak Studio by securing an additional \$65K grant from the Best Buy Foundation for the Career Pathways Program, plus \$25K for support staff, and \$13K for incentives and internship stipends.
- ✓ Strong Support from Foundations: Foundations contributed 57%.
- ✓ Substantial Corporate Support: Corporate grants made up 18%.
- ✓ Diversified Government Funding: Government grants accounted for 14%.
- ✓ The Development Advisory Council continues to be composed of dedicated "worker bees" who take on projects ranging from events to appeals, providing invaluable support. This year, several key players stepped up in instrumental ways to advise, lead, and drive revenue generation.
  - **Loretta Sieman** successfully brought Don Lamberti back into the Oakridge fold, facilitating a meeting with Randy and me this fall. She was also so impressed with the Teen Tech Center that she reached out to her friend, Jim Duncan, encouraging him to write a story—an effort that resulted in a published feature.
  - **Mary Daily Lange** has been a driving force behind the success of Oak Studio, mentoring and teaching in the Career Pathways program.
  - **James Daniel** continues to consult and deliver key opportunities, including securing leads like the Schuls Foundation.
  - **Danny O'Halloran**, a startup wizard and all-around operations guru, made a tremendous impact this year. He helped streamline processes, identify synergies, introduce new platforms, and draft a much-needed monetization policy to guide Oak Studio's revenue generation.

The commitment and expertise of these individuals have been invaluable in advancing Oakridge's mission and initiatives.

### 2025 Opportunities / Goals:

- ✓ Opportunity for expansion / campus acquisition : Mainframe parking lot purchase (est. \$849K). Feasibility group being assembled.
- ✓ Development goal for 2025 is \$2.7 million, per the approved 2025 ONS budget. In addition, \$340K in miscellaneous income is needed to offset the budget deficit. This ambitious \$3 million goal includes basic assumptions, including successful attainment of the "big 3": Shared Visions (application on hold until Oak Academy regains accreditation); 21<sup>st</sup> CCLC (due Friday); and WrapAround (dependent on Shared Visions).
- ✓ Continue focusing on boosting private donor investment in the organization.
- ✓ Increase ROI for both JJJ - Net profit \$89,671 vs \$119,415 (-25%); and Breakfast at Tiffany's - FY24 \$38,500 vs FY23 \$21,669 (+78%)
- ✓ Cultivate potential 2025 Oak Society honorees, Susan and Bill Knapp (October)