



ORCA: THE 2011 ANNUAL REPORT

FUNDRAISING

- Raised over \$26,000 in total contributions in our first year.
- Recruited nearly 50 local businesses to affiliate with ORCA as corporate sponsors at \$50 per sponsor; raised almost \$2,500 to underwrite ORCA expenses. ¹
- Marketed the International (discount) Dining Guide within Ocean Ridge; 204 sold in the first year, netting \$2,040 for charities.
- Planned and carried out first major ORCA fundraising campaign—to underwrite the creation of an Ocean Ridge nursing scholarship at Brunswick Community College:
 - Designated a Trivia Nite Championship as the principal fundraising event;
 - Established an Ocean Ridge nursing committee to organize the event and recruited several dozen volunteers to assist;
 - Hosted 120 guests at the sell-out event; received donations from another 44 households, and;
 - Raised nearly \$6,000 for the scholarship.
- Planned and carried out a second major fundraising campaign to raise \$10,000 over five years for the construction of Brunswick County's first residential hospice care facility; We raised the funds in less than 90 days through a multi-tiered campaign:
 - Started ORCA's first memorial fundraising effort; raised nearly \$1600;
 - Launched our first community-wide, direct mail solicitation; raised almost \$4,000;
 - Initiated the Cookbook drive to publish an Ocean Ridge recipe collection; nearly 440 sold, over \$5,000 raised along with another \$500 collected from the cookbook art auction;
 - Hosted our second, fundraising event—Bistro Nite—and raised nearly \$2,400;
 - Raised nearly \$700 at ORCA's second annual Christmas Art & Crafts show;
 - Connected over 250 Ocean Ridge households to the hospice campaign.
- Involved nearly 350 Ocean Ridge households in ORCA fundraising and activities.
- Managed donor and volunteer lists of over 400 names; created/maintained an up-to-date mailing list of all Ocean Ridge residents.

CONTRIBUTIONS

- Earmarked nearly \$23,000 of our eligible dollars in donations for county charities and non-profits.

¹Corporate sponsorship dollars not eligible for charitable donations and are instead used for ORCA administrative expenses.

(over)

- Used the net proceeds raised from Trivia Nite, plus \$5,000 in PPOA transfer assets, a \$5,000 matching grant from the BCC Foundation and \$5,000 from the David Kelly scholarship account to fund the \$25,000 Ocean Ridge—David Kelly Nursing Scholarship Endowment.² Each academic year the endowment will provide a one semester, tuition and textbook scholarship to a second year nursing student with a 3.0 GPA. A \$5,000 funding obligation remains, payable over 5 years.
- Developed eligibility criteria for determining which Brunswick county human needs charities and non-profits would be appropriate for ORCA donations and adopted limits on the maximum size of individual donations.
- Used our 2009-2010 survey of ongoing neighborhood charitable activities to pinpoint needy organizations which hadn't received financial support from Ocean Ridge and targeted ORCA donations accordingly.
- Used that information to make several \$500 grants to local charities including Providence Home, New Hope Medical Clinic, the Boys and Girls Homes of North Carolina and Waves4kids as well as donations to the Brunswick County Literacy Council and Hope Harbor.
- Began research to create comprehensive roster of Brunswick County charities and non-profits for community-wide distribution.

BUSINESS OPERATIONS

- Obtained formal approval from The Coastal Companies to use the name "Ocean Ridge" and named the new charity—the *Ocean Ridge Charities Association, Inc.*
- Approved for IRS 501c(3) and NC tax exempt status as well as NC state incorporation.
- Set up our P.O. Box and secured a USPS non-profit mail permit for discounted mailings; established an e-mail address orcharities@gmail.com; designed the ORCA logo/letterhead.
- Initiated an ORCA strategic planning process to develop short and long range fundraising and other goals; adopted a 12 month work plan for 2011.
- Purchased Director's and Officer's Insurance for the ORCA Board of Directors as well as liability insurance for the organization.

FINANCES

- Opened ORCA accounts at a local community bank; completed the transfer of the \$13,500 in remaining PPOA funds.
- Instituted a set of financial guidelines to govern the allocation of the \$13,500 in transfer funds. The guidelines also establish an administrative reserve account and a "match money" fund to encourage fundraising partnerships with other OR initiatives.
- Developed a 12 month annual operating budget.

COMMUNICATIONS

- Maintained ongoing community outreach through e-mails, *ORCHIDS* and *Changing Tides*. *Changing Tides* published over a half dozen articles about ORCA in 2011.

²The remaining \$5,000 to be raised in \$1,000 installments over the next five year.

- Developed a press list of local print media contacts; issued press releases and press advisories to these media outlets.
- Generated two flights of press coverage: First for the scholarship announcement and second for the presentation of ORCA grants to selected charities; coverage in the Brunswick Beacon, Stateport Pilot (Southport), Myrtle Beach Sun News, the South Brunswick Magazine as well as in the publications of recipient organizations.
- Created an ORCA website, www.orcharities.org
- Sponsored community-wide scholarship presentation reception; over 100 residents attended.

PARTNERSHIPS

- Initiated contacts with the St. James and Brunswick Plantation Service Clubs; met with leadership of both organizations and received valuable guidance and advice.
- Initiated first Ocean Ridge community charitable partnerships; provided first match money grant; Provided ORLGA with tax exempt conduit for raising charitable dollars in two fundraising efforts.
- Provided in-kind support to both ORLGA for their charitable initiatives and to ORMGA for their First Tee campaign.
- Partnered with the David Kelly Nursing Scholarship and the BCC Foundation to create the endowed Ocean Ridge nursing scholarship.
- Adopted the Medical Dolls initiative as an ORCA project; Signed up over 60 volunteers; Initially produced some 30 dolls for presentation to hospice.
- Continues to actively seek fundraising and other partnerships within the community.

GOVERNANCE

- Adopted a mission statement: *“The Ocean Ridge Charities Association, Inc. (ORCA) is a non-profit corporation established within the community of Ocean Ridge Plantation to identify and support charitable needs within Brunswick County through enhanced charitable fundraising and volunteer participation.”*
- Completed a comprehensive, 11 page set of by-laws for ORCA membership governance.
- Developed a detailed conflict-of-interest policy for members of the ORCA Board of Directors.
- Transitioned the ORCA Steering Committee into a 15 member Board of Directors of Ocean Ridge residents.
- Welcomed new Board members Peggy Burris and Barbara Ellenberger to the Board of Directors in 2011 as three other members—Randy Pelton, Ron Sorice and Victoria Schacht—completed their Board service.
- Designated Fall 2012 as the target timeline for first ORCA membership meeting.

