

Welcome!



Wayne County Foundation

Challenge Match Initiative

November 5 -13, 2018

Some Background ...

- ❖ An Opportunity to Better Align Foundation Grants with Community Interests and Promote Philanthropy
- ❖ Provide Grantees with an Effective Development Tool and Encourage Fundraising Best Practices
- ❖ No Particular Restrictions as to Purpose
- ❖ Participant Organizations Selected Based on Impact and Plans to Leverage the Opportunity



Some Background ...

Year	Applicants	Selected Orgs.	Match \$\$	Community \$\$ Raised	Total
2011	11	5 (+1)	\$42,133	\$126,928	\$169,061
2012	33	26	\$150,000	\$390,300	\$540,300
2013	35	35	\$169,250	\$532,787	\$702,037
2014	45	40	\$231,100	\$792,580	\$1,023,950
2015	50	26	\$200,000	\$779,412	\$979,412
2016	51	46	\$230,000	\$1,272,044	\$1,502,044
2017	53	49	\$240,000	\$1,268,535	\$1,508,635

This Year ...



No Significant Changes This Year

(Yay!)



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- ❖ Same Selection Criteria



Some Details and Finer Points

❖ Requirements for Participation:

- Qualified Charity or Fiscal Sponsor Partnership
- Located in Wayne County
- Good Standing with the IRS and the Foundation *
- Some Previous Relationship with the Foundation



Some Details and Finer Points

- * “In Good Standing with the Foundation” means (in part) being **current with grant use reports** from previous Grant Cycles and Challenge Matches **no later than Wednesday, August 1.**



Some Details and Finer Points

❖ Three “Classes” of Participation:

- \$10K Match Goal; \$5K Threshold
- \$5K Match Goal; \$2.5K Threshold
- \$2.5K Match Goal; No Threshold

❖ Thresholds Must be Met to Trigger Match Up to Amount of Match Goal

❖ Apply for the Level You Can Justify



Some Details and Finer Points

❖ 1:1 Match up to Stated Match Goal

- Cash Contributions Only (No Pledges)
- During the Match Period
- After Threshold Amount Has Been Achieved

❖ Qualifying Gift Limit:

\$1,000 per Gift per Donor per Organization



Some Details and Finer Points

Gifts Must Be Received
During the Match Period
to Qualify

November 5 – 13, 2018



Some Details and Finer Points

❖ Bonus Bucks

- Unallocated Match Dollars
- Distributed on a Prorated Basis to Organizations that Achieve their Match Goals
- Up to the Amount of Overachievement



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- Up to the Amount of Overachievement
- Possible Bonus Bucks Pool Still Under Discussion



Some Details and Finer Points

- ❖ Gifts Received and Processed by Participating Organizations at their Locations
- ❖ Verification
 - Spreadsheet Summaries
 - Copies of Thank-You Letters
- ❖ Foundation's Online Giving Option Available



Threshold Examples

❖ \$2,500 Match Goal; No Threshold

- Dollar for Dollar Match on Qualified Amounts Raised Up to \$2,500
- Eligible for Bonus Bucks if More Than \$2,500 is Raised



Threshold Examples

❖ All Other Match Goal Levels

- Threshold is 50% of the Match Goal
- Dollar for Dollar Match on Qualified Amounts Raised Once the Threshold is Achieved ... Up to the Match Goal
- Eligible for Bonus Bucks if the Match is Maximized



The Same Application Process

Online Application

Access it at

<https://tinyurl.com/wcfgrants>

or

www.waynecountyfoundation.org



The Same Selection Criteria

- ❖ The impact your participation represents in terms of new / expanded / improved services to address an identified need or opportunity
- ❖ Your plan to measure and report specific outcomes participating in the Match will help make possible
- ❖ The importance to your organization of participating in the Challenge Match at this particular time
- ❖ Your plan to achieve your match goal



What We Want to Know

- ❖ Describe the changes or benefits you seek to effect
- ❖ What will this mean to your constituents or the community?
- ❖ How will you measure your success?
- ❖ How will participating in the Challenge Match help?
- ❖ What is your plan to achieve your goal?



What We Want to See ...

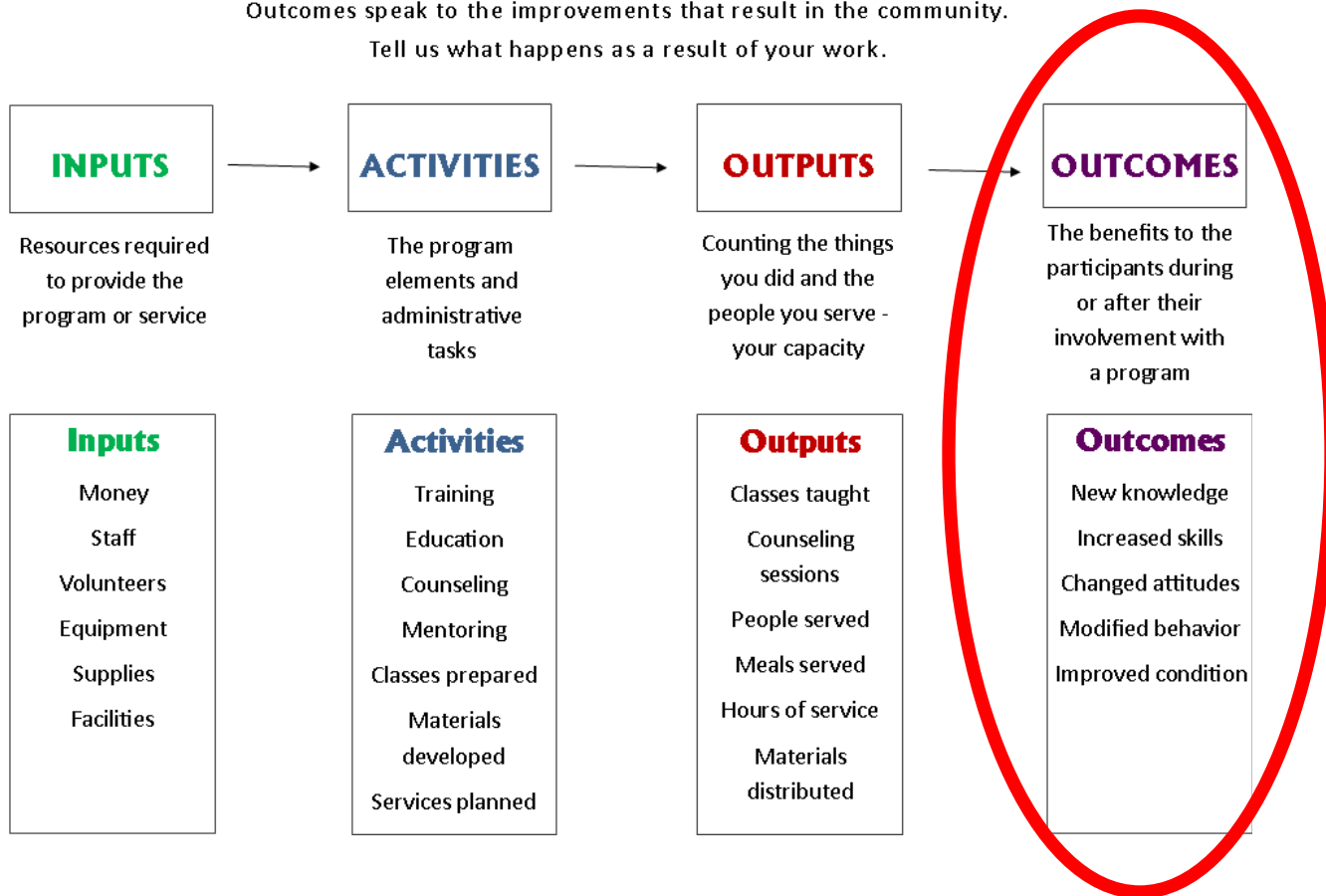
A Bigger Emphasis on
Thoughtful, Well-Written
Applications That Speak to
Meaningful Outcomes



Thinking About Outcomes

Outcomes

Outcomes tell us what happened as a result of using resources and engaging in activities.
Outcomes speak to the improvements that result in the community.
Tell us what happens as a result of your work.



Thinking About the Application

- ❖ Be Clear and Concise
- ❖ Answer the Questions Directly
- ❖ Don't Repeat Information
- ❖ Communicate Outcomes



Your Plan is Important

- ❖ How will you approach your current donors?
- ❖ How will you identify and communicate with prospective new donors?
- ❖ How will your approach to the Challenge Match complement your other fundraising efforts?
- ❖ What outcomes do you expect to achieve and how will you measure success?



And Every Plan Will be Different

Remember:

The Challenge Match can be a tool to help you strengthen your development function.

What will that look like for your organization?

- Prospect Development
- Communication
- Donor Cultivation
- Donor Stewardship
- Case Development
- Board Engagement
- Solicitation Strategies
- Office Systems



Some Words About Marketing ...

Because of the threshold requirements and the match limits, it is neither accurate nor fair to tell your donors that their gift will be doubled or matched dollar for dollar.

Do not fall into this trap.



Some Words About Marketing ...

Be careful about promoting your participation in the Challenge Match before you are named as a participant in the Challenge Match.

Do not fall into this trap either.



A Word About Reporting ...

We are asking that you take greater care in reporting dollars that are received during the Match Period that have no direct relationship to your marketing for the Challenge Match.

Payments on pledges made prior to the Match do not qualify.



A Word About Receipting ...

Qualified Charitable Distributions require special language in the thank-you letter ... but this language should **ONLY** go in those letters relating to this type of gift.



Key Dates

- ❖ Wednesday, **August 1**– Application Deadline
- ❖ **September 20** – Participants Notified
- ❖ **November 5 through November 13** – Match Period
- ❖ **November 30**– Spreadsheet Summaries Due
- ❖ **December 7** – Copies of Thank-You Letters Due
- ❖ All Distributions Made This Year



Help is Available!

- ❖ This Presentation, FAQs, and Handouts on the Foundation Website
- ❖ Contact **Lisa Bates** about Application Materials and Program Plans
- ❖ Contact **Rachel Hughes** for Advice About Fundraising / Solicitation Best Practices



Questions?



Upcoming Events

- ❖ August 22 – Women’s Networking Luncheon
- ❖ October 4 – Nonprofit Networking Luncheon
- ❖ October 12 – Women’s Leadership Conference



Thanks for Coming!

