

# No Significant Changes This Year

- ❖ Same Qualifying Criteria and Application Process
- ❖ Classes of Participation with Match Thresholds
- ❖ Match Period in November
- ❖ Same Criteria for Qualifying Gifts and Bonus Bucks
- ❖ Same 1:1 Match Up to Goal on Qualifying Gifts
- ❖ Same Reporting, Receipting, and Verification Procedures
- ❖ Similar 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. **2019 Spring Grant Cycle reports are due November 30.**



# Some Details and Finer Points

## ❖ Three “Classes” of Participation:

- \$10K Match Goal
- \$5K Match Goal
- \$2.5K Match Goal

## ❖ 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 4 – 12, 2019



# 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



# So ... What's Changing?

## ❖ Thresholds Now Set to 100% of Match Goal

- \$10K Match Goal; \$10K Threshold
- \$5K Match Goal; \$5K Threshold
- \$2.5K Match Goal; \$2.5K Threshold





# Threshold Examples

## ❖ All Match Goal Levels

- Threshold is 100% of the Match Goal
- Dollar for Dollar Match on Qualified Amounts Raised Once the Threshold is Achieved ... Up to the Match Goal



# So ... What's Changing?

- ❖ Thresholds Now Set to 100% of Match Goal
- ❖ No Projects. Operating Support Only
- ❖ Staff to Review/Score Development Plans
- ❖ Greater Reliance on Previous Performance to Evaluate Match Goal Requests



# The Same Application Process

Online Application

Access it at

<https://tinyurl.com/wcfgrants>

or

[www.waynecountyfoundation.org](http://www.waynecountyfoundation.org)



# What We Want to See ...

Thoughtful, Well-Written  
Applications That Include  
Strong Fund-Raising Plans



# Thinking About the Application

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



# 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

- ❖ What do you seek to accomplish with the funds you will raise during the Challenge Match?
- ❖ Describe what will this mean to your constituents or the community.
- ❖ How will you know if your participation in the Challenge Match is making a positive difference in the community?
- ❖ What measurements will you use?
- ❖ Tell us why it is important for your organization to participate this year.



# Your Plan is Important

- ❖ How will your efforts to solicit Challenge Match contributions complement or enhance your organization's overall fundraising plan or activities?
- ❖ How will you approach your current donors to ask them for gifts during the Challenge Match?
- ❖ How will you identify and communicate with prospective new donors?
- ❖ How will you steward your donors in the year following the Challenge Match? How will you thank them immediately? What action will you take at 6 and 9 months following the gift?





# And Every Plan Will be Different

Remember:

The Challenge Match is 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

- ❖ Friday, **August 16**– Application Deadline
- ❖ **September 21** – Participants Notified
- ❖ **November 4 through November 12** – Match Period
- ❖ **November 29** – Spreadsheet Summaries Due
- ❖ **December 6** – 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



# Upcoming Events

- ❖ August 28 – Women’s Networking Luncheon
- ❖ September 17 – Nonprofit Networking Luncheon
- ❖ October 4 – Women’s Leadership Conference

