

# Welcome!

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**Wayne County Foundation**

**Challenge Match Initiative**  
**November 6 - 13, 2017**

# Some Background ...

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- ❖ 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	<b>\$1,272,044</b>	<b>\$1,502,044</b>

# This Year ...

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- ❖ Same Criteria for Qualifying Gifts and Bonus Bucks





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- ❖ Same 1:1 Match Up to Goal on Qualifying Gifts



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- ❖ 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



# Some Details and Finer Points

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## ❖ 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

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- \* “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 15.**



# Some Details and Finer Points

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- ❖ Qualifying Gift Limit:  
\$1,000 per Gift per Donor per Organization
  
- ❖ 1:1 Match up to Stated Match Goal
  - Cash Contributions Only (No Pledges)
  - During the Match Period
  - After Threshold Amount Has Been Achieved



# Some Details and Finer Points

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## ❖ Bonus Bucks

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



# Some Details and Finer Points

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- ❖ 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

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- ❖ \$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

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- ❖ 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

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Online Application

Access it at

<https://tinyurl.com/wcfgrants>

or

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



# The Same Selection Criteria

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- ❖ 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

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- ❖ 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?



# So What's New ...

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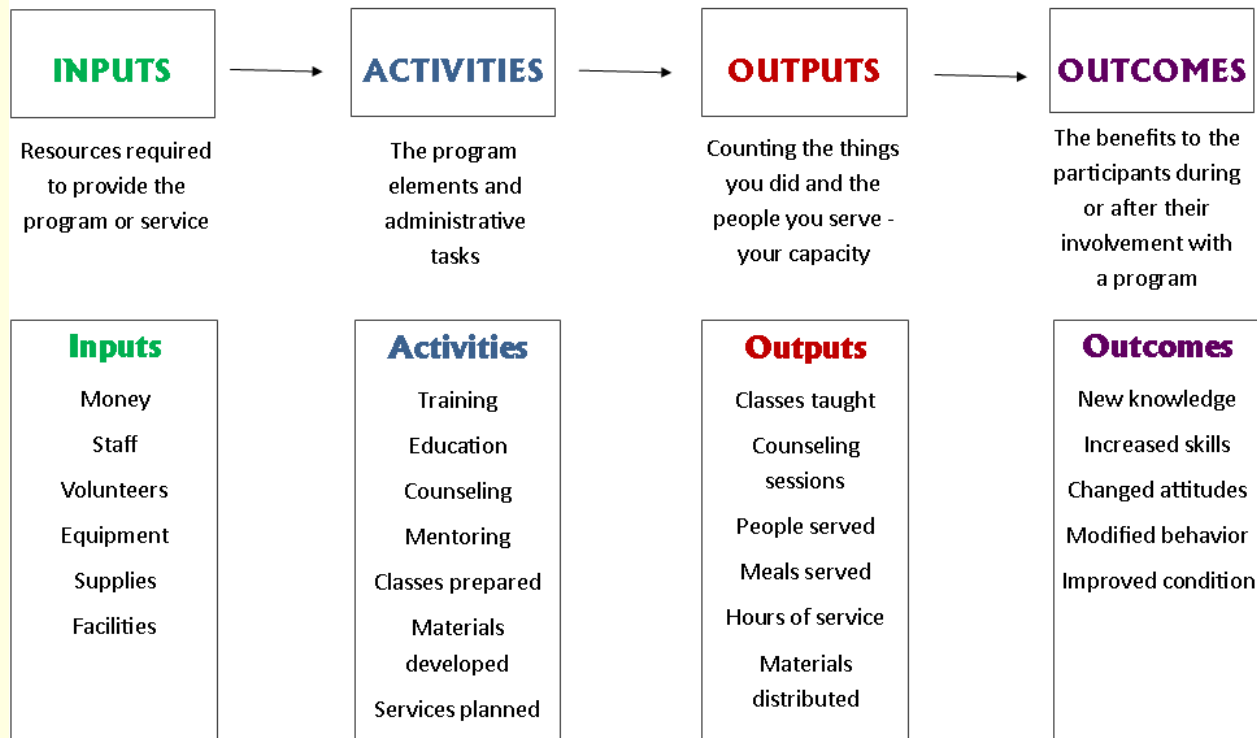
A Bigger Emphasis on  
Thoughtful, Well-Written  
Applications That Speak  
to Meaningful Outcomes



# 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

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



# Your Plan is Important

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- ❖ 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

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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



# Key Dates

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- ❖ Friday, **August 25** – Application Deadline
- ❖ **October 19** – Participants Notified
- ❖ **November 6 through November 13** – Match Period
- ❖ **December 1** – Spreadsheet Summaries Due
- ❖ **December 8** – Copies of Thank-You Letters Due
- ❖ All Distributions Made This Year



# Help is Available!

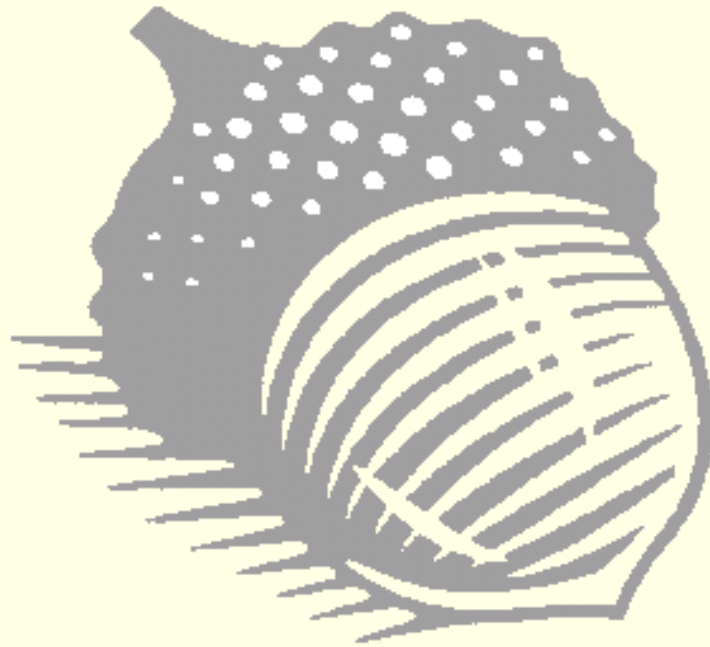
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- ❖ This Presentation, FAQs, and Handouts on the Foundation Website
- ❖ Contact **Lisa Bates** about Application Materials and Program Plans
- ❖ Contact **Rachel Hughes** for Advice About Fundraising / Solicitation Best Practices



# Questions?

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# Upcoming Events

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- ❖ August 10 – Nonprofit Networking Luncheon
- ❖ September 27 – Board Roles and Responsibilities with Nick Parkevich
- ❖ October 6 – Women's Leadership Conference

