



# Texas Association of Community College Foundations

## 2014 Annual Conference



### **Dr. Eileen Piwetz**

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***FMH Foundation***

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Dr. Eileen Piwetz is the Executive Director of the FMH Foundation in Midland, Texas. Prior to this appointment, she served as the Vice President of Institutional Advancement at Midland College and Executive Director of the Midland College Foundation, Inc.

Eileen is a member of Executive Women of Midland and the Conference of Southwest Foundations and serves on the Midland Memorial Hospital Institutional Review Board. Dr. Piwetz has been very active both nationally and within the local community, having served on numerous boards.

Eileen was honored by the Uptown Midland Business and Professional Women as the 2008 Woman of Achievement. In 2005, she was honored by the Girl Scouts of the Permian Basin as a Woman of Distinction. Piwetz received the Council for Resource Development Lifetime Service Award in 2003. In 1996, she was named the Outstanding Fundraising Executive by the Permian Basin Chapter of the National Society for Fund Raising Executives. Dr. Piwetz has made numerous professional presentations and has published several articles on a variety of topics. Her hobbies include international travel, wildlife photography and reading.

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# Board Fundraising

Texas Association of Community College Foundations  
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" No individual, corporation or foundation including governmental agencies simply want to give money away. Yet, there are thousands of people that want to positively change people's lives."

Robert F. Hartsook

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# Essentials for Successful Fundraising

- Positive image and reputation
- Long term relationships with donors
- Involvement with the agency
- Consensus on the agency's mission (ideals, values)
- Fiscal stability

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### Essentials for Successful Fundraising

- Strategies for cultivating, asking and recognizing
- Appeal and drama of campaign materials
- Defined roles and expectations of team members
- An effective fund-raising team
- Gift Acceptance Policy

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### Board Member's Role

- Understand the agency's Mission, Priorities and Needs
- Attend board meetings faithfully
- Assure accountability
- Serve as a good steward of the agency's funds
- Hire the right staff

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### Board Member's Role

- Promote positive relationships with the community
- Identify prospects
- Open doors for the agency
- Give of own finances
- Attend friend raising and fund raising events
- Have a passion for the work

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100% of  
Board Members  
must contribute!

### Establishing the Agency For A Campaign

- Is Board leadership strong?
- Is Executive Director Committed?
- Is staffing adequate?
- Is campaign budget attainable?
- Is "case" acceptable to all?
- Is giving strong?
- Is there potential for major gifts?
- Is this project sustainable?

### Case Statement The Basic Fund Raising Tool

- Accurate relevant data that supports why this project is important.
- What the organization plans to do.
- Positive reasons why support would make a difference.

## Case Preparation

- Brief
- Sense of force and urgency
- Tastefully Prepared
- Well written
- Simple (as opposed to elaborate or extravagant)
- Free of dishonest claims exaggerations and gimmickry

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## The Write Stuff

- Sell your reader
- Appeal first to the emotions then to the intellect
- Hone your words painstakingly
- Tell your readers the problem and what you want them to do
- Relate the problem to your clients or the community
- Use visual aids and quotations

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## Suggestions From a Weary Reader of Case Statements

- There is no need to reinvent the wheel – little value in trying to convince the reader of your organization's unique:
  - Service to humankind
  - Dedication of loyal staff
  - Commitment to excellence
- Honest, directness, and realism are respected. Opposites are easily detected.
- Brevity increases chances of serious readership.
- Most adjectives and adverbs can be eliminated without damage to the message.

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### Character Case Statement

Imagine the student who was criticized for wearing a rumpled uniform, and later the faculty learned that the student was living in his car and eating out of the garbage, having no monies for housing or food.

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### Anecdotal Case Statement

- Observe a paramedic student deliver an electrical shock to a man suffering from ventricular fibrillation;
- Stand in awe while the medical student delivers a baby in the breech position and then responds to the mother's excessive bleeding; and
- See the ultrasound student provide guidance for the placement of the central line into the internal jugular vein.

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### Narrative Case Statement

For the past eight years, state appropriations for higher education have proportionately decreased while enrollments have increased. We cannot ask our local taxpayers to share an unreasonable part of the costs, nor can we expect students to bear larger increases in tuition.

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XYZ Agency does not  
have needs –  
Clients have needs!!!

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Remember

No one wants to  
invest in a loser

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Let's take a short break

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## Individuals

- Who do you know?
- Who do other Board Members know?
- Can you identify 5 individuals and amounts?

## Prospect Research

- Relationship to agency
- Interests - particularly as they relate to the agency
- Networking – who in your agency is close to the prospect
- Capability (net worth)
- Motivation

90% = Research  
10% = Ask

## Database

Keep your database current –

Do not send mail to  
**DEAD PEOPLE!!!**

## What Pays the Biggest Dividends in Raising Money?

The right combination of:

- Networking
- Research
- Personal Attention

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## Why Do They Donate?

- Give back to the community – people investing in people
- It's a personal thing
- Yes, sometimes money does “walk in the door”
- Don't always stand on principle
- Tell the story
- People want to give
- People want to be asked
- It is who you know!

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## Gender Differences in Giving

Generally, men give for recognition  
while women give from the heart.

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### Women

- Give as a personal response to need
- Give to specific needs
- Give time and money
- Give because of personal impact
- Give because of personal involvement in organization
- Want to make a difference

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### Men

- Give for recognition
- Give on a reciprocal fashion
- For networking
- Have a longer tradition of giving \$\$
- Give for practical, tax-savings reasons
- Give for business reasons

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### Female Prospects

- More unmarried and never-married women than ever before - 3.4 million ages 34-54.
- Women on their own represent 1 in 6 households.
- Most women marry older men – 8 million men have children younger than their grandchildren. Second wives have greater influence.
- Later marriage and child-bearing. Many have no children.
- Baby Boomer women outlive their husbands by 15 years, inheriting the estates of males.
- Nearly half of elderly women are widowed - controlling the disposition of their and their spouse's estates.

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## Female Prospects

- Because of their longevity, 86% of the US wealth passes through the hands of women.
- Boomer women are single or married without children and earning more and more money.
- 51% of college students are women.
- Among high achieving women, 60% of the executives have no children.
- Own 36% of US businesses.
- Almost 60% of the wealth of this country is already owned by women. \*
- Of those with net worth of \$500,000 or more, 47% are women.

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## Why Women Don't Give

1. No matter the size of their net worth, many women have a feeling of financial insecurity.
2. It's not their money to give away.
3. Women haven't yet found their own passions.
4. Women are concerned about going public with their gift.
5. Women are sometimes concerned they don't know how to give wisely.
6. They were not asked.
7. When a gift is made (even a modest one) the organization doesn't demonstrate skillful stewardship, and doesn't describe in dramatic terms the results and outcomes of the gift.

Source: Jerold Panus, 2001

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**50 – 70%**  
**of donors**  
**never**  
**make a second gift!**

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Gift Acceptance Policy

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Let's take a short break

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Two Truths and a Lie

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## Two Truths and a Lie

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## Foundations

- Local family foundations
- Personal ties to a foundation

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## Do Your Homework!!!

- Make sure your project advances the mission of the entity from which you are requesting funds.
- What is their vision?

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**Grants**

Types of Grants

- Operating
- Project

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Let's take a short break

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**Corporate Funding**

Corporate funding is usually a "this for that exchange".

Corporations do not usually *give away* money, they *invest* it.

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## Corporate vs. Individual Support

	Individuals	Corporations
Motives for Giving	Personal attachment to organization	Self-interest
Cultivation	Involve them in the agency's mission and activities	Create awareness of agency's activities and resources
Association	Feel pride through association with your agency	See value of its association with your agency
The "ASK"	Emotional event related to the need	Must be supported by facts and focused on opportunity

## Why Do Corporations "Invest" in Philanthropy?

1. Corporations operate in a culture that expects them to be "good corporate citizens" and more socially responsible in the wake of highly publicized financial scandals.
2. They want to maintain a competent workforce in safe neighborhoods, with accessible health care and cultural amenities.
3. Giving involves egos – entertained and associate with power elite.
4. Corporations give for sound business reasons fostering pivotal relationships and positive impressions useful in marketing.

## Why Do Corporations "Invest" in Philanthropy?

5. Corporations are looking for better return on investment with their charitable partnerships.
6. "So-called tax benefit" is greatly misunderstood. A corporate contribution is an expense. You have the position giving in the context.
7. Motivation: Sentiment or merit? Corporations exist to make money, not to give it away.

## Realities of Corporate Giving

- Corporations give away a substantial amount of money;
- More nonprofits are seeking corporate donations than ever before;
- Corporate giving is affected by the business cycle;
- Corporations invest in programs that enhance their image with the community;

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## Realities of Corporate Giving

- Contacts and relationships with senior executives matter;
- A community-minded, older generation of corporate leaders are passing from the scene;
- Corporate giving differs from individual giving.

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## Corporate Philanthropy

- Expertise
- Products
- Sponsorship
- Volunteers
- Matching Gifts

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### Small Business People Make Outstanding Charitable Prospects

- Six out of 10 of the truly affluent own their own businesses.
- They are often able to dip into two pockets: their own and their companies.
- Their stock is often privately held and higher appreciated.
- 9 out of 10 business owners contribute to charity.
- 89% of affluent business owners are from "poor" or "middle class" backgrounds; only 10% inherited their fortunes.

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### What Will Corporations Fund?

**They are not likely to fund:**

- Buildings
- Unrestricted Cash
- Gifts for endowments
- Multi-year gifts

**They will fund:**

- Programs- Particularly those that focus on
  - Social
  - Economic or
  - Business concerns

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### Special Events

- Friend-raising opportunity
- ROI?

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## Public Relations

- Tell your "story" over and over
- Celebrate success – BRAG!!!
- Promote the image and reputation of your agency
- Gather success stories
- Help to "sell" your program
- People learn about you and want to become involved
- Site Visits
- Social Media

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"When we accept a gift on behalf of an institution or organization, we also accept a range of responsibilities to the donor. We agree to manage the money properly, to fulfill all reported obligations, to be faithful to the donor's wishes in every reasonable way. In short, we agree to keep a trust, in perpetuity."

"In practical terms, keeping this trust involves sustaining a long-term relationship with the donor to believe, rightly, that they have made a wise investment."

James Bowers, *Advancing Philanthropy*, 1997.

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## Stewardship Practices

- Value all gifts
- Provide appropriate acknowledgment of gift
- Handwritten vs. typed
- Manage gifts as a donor investment
- Provide regular reports on the status of the investment

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## Stewardship Practices

### Provide naming opportunity

- Building
- Major Room
- Program
- Donor Wall
- Bricks

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## Stewardship Practices

### Recognize

- Issue a press release highlighting the donor's gift
- Publish gift in your newsletter or annual report
- Have honorary chairman thank
- Have recipient send a thank-you
- Nominate the donor for a local, state, or national volunteer or philanthropic award

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## Stewardship Practices

- Provide a respectable and appropriate memento. (Caution!!!)
- Hold a donor appreciation dinner
- Invite the donor's extended family to participate in your organization's activities
- Nominate the donor to serve as a director of your organization

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### Stewardship Practices

- Clip and send articles or information of interest to the donor and donor's family
- Attend an event that is important to the donor
- Keep up with birthdays and anniversaries and send personally signed cards.

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### Communicate Regularly

- Three to six times per year
- Report use of funds before asking for future support
- Remember other important dates – death of a spouse, anniversary of major gift, dedication of a building
- Likewise, recognize the anniversary of donor's death with a note or phone call to survivors

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### If You Are the Donor, There Are No "Little Mistakes."

- Admit it
- Correct it
- Do it right the first time

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## Never Forget

- What a donor has done for you!!!
- Donors will remember longer than you do

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## Passion

- A missionary zeal
- Fueled with flame, passion and spirit
- If you don't feel the passion, commitment and joy - you're at the wrong agency!

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## Planned Giving and Endowment

### Planned Giving

- Gifts through wills or estates
- Importance of sustaining relationships
- Ability to accept gifts

### Endowment

- Creation of a fund for long-term income
- Sizeable endowment needed to cover operating expenses.

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People who work together for  
exceptional causes achieve unbelievable results

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"Every morning in Africa, a gazelle wakes up. It knows it must run faster than the fastest lion or it will lose its life.

Every morning in Africa, a lion wakes up. It knows it must run faster than the slowest gazelle or it will starve to death.

It doesn't matter whether you're a lion or a gazelle when the sun comes up, you'd better be running!"

-Sent in by newspaper reader of Centerville, Utah

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