



**Center for
Nonprofits & Philanthropy**
THE BUSH SCHOOL • TEXAS A&M UNIVERSITY

Captivating Donors with Mission & Impact

TEFN Annual Conference
April 14, 2023
San Marcos, Texas

Angela Seaworth, Ph.D., MBA, ACFRE

Agenda



- Welcome
- Evaluate Vision and Mission
- Power of Case Statements
- Analyzing your Constituents
- Elements of a Case Statement
- Using Data to Help Demonstrate Impact
- Creating Your Case Statement
- Questions & Answers





GUIDING STATEMENTS

Learning about your Education Foundation



Center for
Nonprofits & Philanthropy
THE BUSH SCHOOL • TEXAS A&M UNIVERSITY

Revisiting Your Guiding Statements



Mission Statement

- Reason the organization exists and the need it meets in the community
- Provides the foundation for evaluating the success of the organization, verifies it is on the right track as new opportunities arise
- Concise, realistic, inspirational statement of the organization's core values and purpose

Vision Statement

- What the future will look like in your community if your organization succeeds
- Guides the long-term strategy for the organization and reminds the board and staff how to stay on track
- Inspires action toward organizational goals: programs, fundraising, marketing, finance, governance, and management



Vision Statement



What is your Vision Statement?

If you don't have one, you can do some exercises to develop it.

- 1) What would you do if you reached a goal of raising \$1 million per year?
- 2) In 10 years, you read the local newspaper, and your Education Foundation is featured on the front page. What is the headline?

As you move forward, you can work toward your one-sentence vision that captures what you community will look like in the future, if the Education Foundation achieves its goals. Should be audacious and believable, which can be challenging.



Mission Statement



Let's analyze the mission
& envision the future

Sample Mission

To enhance the mission of Bryan ISD: Children First... Always

- Does the mission seem relevant to the work you are currently doing?
- What are the key guiding points you take from the mission?
- Does the mission seem to accurately describe what you feel the education foundation will be doing moving forward?
- Do the vision and mission align with your District strategies?





Philanthropy Trends

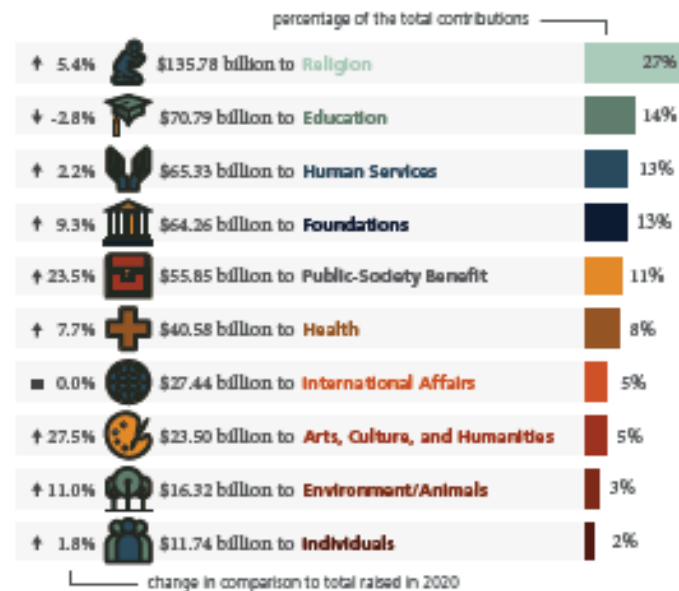
Are People Giving?



Americans gave \$484.85 billion in 2021



Where did the charitable dollars go? Contributions by destination



How about the giving by subsector?

Any surprises?

Donor-advised funds are among the fastest growing forms of giving. Learn more in the new chapter on Donor-Advised Funds.

Giving to public-society benefit organizations increased 23.5% in 2021, and is steadily growing larger as a share of total giving over time.

Several subsectors that struggled in 2020, such as giving to health and arts, culture, and humanities, experienced recoveries in 2021.

Giving USA Foundation®, The Giving Institute, and the Indiana University Lilly Family School of Philanthropy are pleased to continue their partnership in providing the most comprehensive, largest-ranging, and most rigorously researched resource on U.S. charitable giving. Giving USA: The Annual Report on Philanthropy is a privilege to report on American generosity and related historical trends on U.S. charitable giving.

Americans gave \$484.85 billion in 2021



Does any of the giving by constituent data surprise you?

Where did the generosity come from?

Contributions by source
By percentage of the total

67% \$326.87 billion

Giving by Individuals

↑ increased 4.9% over 2020

19% \$90.88 billion

Giving by Foundations

↑ increased 3.4% over 2020

9% \$46.01 billion

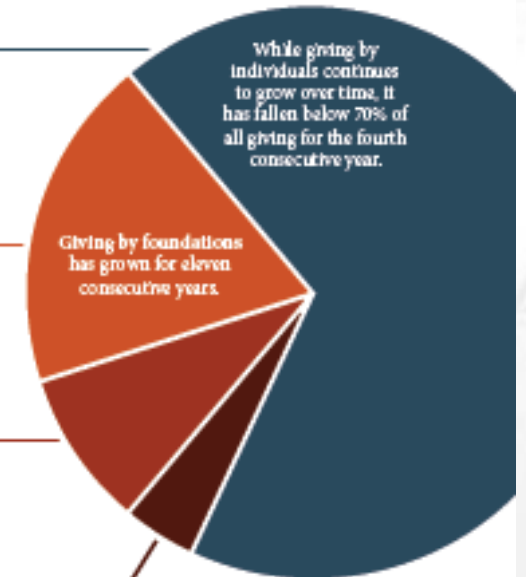
Giving by Bequest

↓ decreased 7.3% over 2020

4% \$21.08 billion

Giving by Corporations

↑ increased 23.8% over 2020



*All figures on this infographic are reported in current dollars unless otherwise noted.





People Are Giving

We have to make a relevant case
for them to stay with us





Constituency Models

Determining Your Audience



Analyzing Your Audience



Exercise: identify all your constituents and organize them visually so you can see those who are closest to your organization and those who are further away

- We need to recognize that people give for different reasons, and most often they have mixed motives for giving
- We have to clearly identify our constituents
- For each proposal, we must identify the audience and tailor the proposal to address their interests and concerns
- Have to develop a way for us to tell our story persuasively that also allows us to tailor it to each of our prospective donors



Who Are Your Constituents?



Let's share your findings from the constituency models you created

- Did you have trouble completing the model?
- Where there any surprises?
- Do you have plans to engage and solicit prospects in each of these levels?
- Do you identify constituents in your fundraising plan so you avoid donor fatigue?





Case Statements

Proving Your Organization is Worthy of Support



Center for
Nonprofits & Philanthropy
THE BUSH SCHOOL • TEXAS A&M UNIVERSITY

Power of Case Statements



- A case is the general reason your organization is worthy of support
- The case statement is the “presentation that sets forth a case”
- Our goal is to craft persuasive statements that show relevancy to each of the audiences with whom we are speaking
 - Internal case
 - External case
 - Annual case
 - Major/Special Gifts case



Source: Seiler, T. (2001.) *Developing Your Case for Support*



Questions to Ask



- What cause does your nonprofit serve?
- How does your organization address community need?
- Who are you serving?
- What results are you seeing from your service?
- What historical evidence supports that you make a difference?
- Why do you need funding?
- What other organization locally provides similar services?
- Why should someone financially support your organization?



Exercise



- Take 5 minutes to craft a simple external case for supporting your organization
- Keep this short and simple... no more than 1 to 2 sentences
- Has to be compelling and explain why your organization is relevant in the community
- Use some of the guiding questions we just covered
- Use any supporting evidence you have
- Let's share our results



Elements of a Case Statement

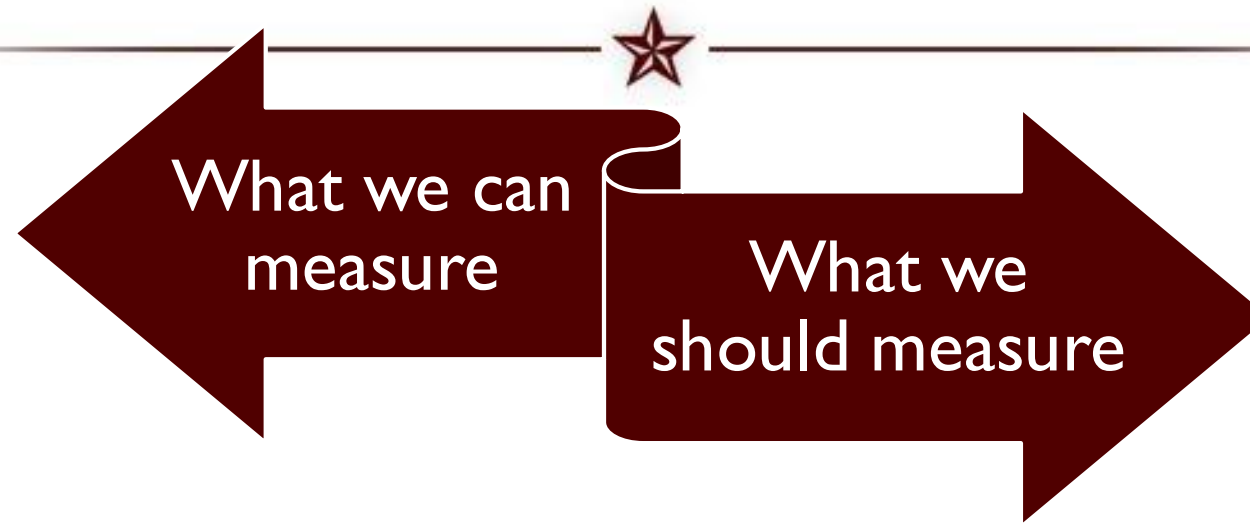


- Mission Statement
- History
- Statement of Need
- Goals and Objectives
- Programs and Services
- Planning and Evaluation
- Staffing
- Governance
- Finances
- Call to Action

Source: Seiler, T. (2001.) *Developing Your Case for Support*



Using Data to Demonstrate Impact



- Who we serve and how many
- Geography of service
- Continual services
- Partnerships with other nonprofits
- How much services cost

- How our programs yield results
- What immediate results do our programs yield
- Do our programs have long-term impact
- How we collaborate in our ecosystem
- Lasting results of each of our programs



Test Your Knowledge



The best way to demonstrate that your organization's mission is relevant is to _____.

- a. share the major community leaders on your board
- b. include an evidence-based argument that there is a need for your services in the community
- c. demonstrate your organization's impact with qualitative and quantitative data you are using to measure program success
- d. both b & c



Creating Your Case Statement



Let's take the last part of the session for you to outline a case statement that can serve as the foundation for you to develop proposals

| | |
|---|---|
| | |
| Explain your organization is and build credibility | Mission Statement and History |
| Demonstrate relevancy in your community (<i>describe the problem your organization is solving</i>) | Statement of Need |
| Describe how your organization can solve the problem (<i>who you are serving, how, and why you are unique</i>) | Goals and Objectives Programs and Services |
| Demonstrate your programs have impact (<i>explain logic model, metrics, how you will evaluate impact of your program</i>) | Planning and Evaluation |
| Establish credibility that you can achieve the goals | Staffing and Governance |
| Disclose financial situation (<i>budget and budget narrative</i>) | Finances and Call to Action |





Questions & Answers



Test Your Knowledge



4) Case statements should always include _____.

- a. mission statement and values
- b. who benefits from the services
- c. program description and goals
- d. all of the above



Learn More About Our Center



Our Center's team is committed to strengthening the nonprofit sector, so please contact us to learn how we may help your organization or help you advance your nonprofit career.

For individual CNP staff contact information, please consult our directory under [Faculty & Staff](#).

Email: bushschool.nonprofitmanagement@tamu.edu

Phone: (979) 862-3195 | Fax: (979) 845-4155

Visit our webpage: <https://bush.tamu.edu/nonprofit/>

View Past Webinars and Research: <https://bush.tamu.edu/nonprofit/resources/>

Follow us for the latest:



BUSH.TAMU.EDU/NONPROFIT



Center for
Nonprofits & Philanthropy
THE BUSH SCHOOL • TEXAS A&M UNIVERSITY