

FUNDER PRESENTATION SCRIPT

Note: This presentation was being made at the funder's request as part of an ongoing relationship; hence, the funder has a base of knowledge about the organization and the program for which it is seeking funding. Names have been changed to protect confidentiality.

[slide]

- Good morning. I'm Elizabeth Sheeran, executive director at Up With Teachers, and this is John Cebula, our board president.

[slide]

- I want to start by saying what a helpful experience this has been. While, as you know, the point of our work was to test the feasibility of offering a mobile outreach program, we have learned so much about fundraising, and donor engagement and stewardship. It's a little hard to say that, as the leaders of a nonprofit ... but we have added so much knowledge to our own fundraising and relationship-building experience.

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- Up With Teachers was founded to remove a roadblock to learning by getting basic school supplies into the hands of students who need them most.
- We know you're familiar with us, so we won't spend a lot of time going over our history or milestones today ... though I am very proud of our 77% donor retention rate because it shows people believe in what we're doing.

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- As you know, right now Up With Teachers is reaching only 1 out of 3 students who need us. In order to reach the other students who are still without the basic tools for learning, we planned to offer a mobile outreach program.
- A mobile outreach program would not replicate the Up With Teachers store. A mobile unit carries just the basics to ensure that every student has the minimum school supplies they need to be successful.

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As [the funder] knows, we looked at several mobile outreach programs, and then launched our own pilot program. The results were more than encouraging:

- We worked through almost 2,000 teachers at 26 schools and delivered \$92,000 worth of supplies through a mobile store.
- *More than 2/3 of the teachers we reached had never been able to visit our permanent store.*

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[The funder] reviewed our pilot's successes and asked how we would support an expanded mobile outreach program.

To answer that question, we partnered with [a marketing agency] on a feasibility study.

- Our leadership and board helped [the marketing agency] understand our organizational goals, opportunities, challenges, critical partners and the potential effect of expanded mobile outreach.

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The first step in the feasibility study was the development of a formal case statement. Its purpose was:

- To outline the philanthropic support needed to produce mobile outreach program outcomes, and
- To be used as a tool in testing campaign readiness and gauging donor interest.

What it became for us, Up With Teachers' leadership, was a good examination of our entire operating structure as well as our fundraising capabilities.

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[The marketing agency] used the case statement in interviews with Up With Teachers' constituents. They asked for interviews from 31 people, and 19 responded: current and prospective donors, our staff and board, and Marion County school administrators.

[If funder asks for names: Go ahead and give them a few from various categories]

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[The marketing agency] found that our supporters are very savvy:

- They discussed the strengths and challenges of Up With Teachers overall and of a mobile outreach program we would administer.
- They explored interviewees' level and duration of giving.
- They talked about ways to sustain and expand a mobile outreach program based on current donor support.
- They sought input on ways to leverage donor support both with and without a major donor's backing.

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At this point, we were looking to support a \$400,000 / year project budget.

Step 3, the final step in the feasibility study, was for [the marketing agency]'s researchers to conduct a comparative analysis.

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[the marketing agency] compared our mobile outreach program to 10 programs that have similar functions. [the marketing agency] looked at their :

- Positioning statements
- Service models
- Funding approaches
- Level of community awareness and
- General donor support

Among those [the marketing agency] examined, the most frequently reason cited for developing mobile outreach was to reach teachers and students that cannot get to a physical store.

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Now, we'd like to present the findings from the feasibility study.

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Finding 1: The need exists.

Overwhelmingly, constituents said Up With Teachers and its mobile outreach program address a particular need of teachers who are educating students from financially challenged families.

Not a single constituent questioned that the need is real.

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Finding 2: Up With Teachers is the right organization to fill the need.

Constituents said:

- Our leadership has the reputation and potential to influence people to give, and
- We are a soundly run organization with a strong board and executive director. We're proud to say that Up With Teachers has 100% board participation in giving.

[this may be good for John to take ... "So many people told us we have an excellent executive director, and we learned the value of meeting donors face to face. So we're already doing that." (don't elaborate here)]

[slide]

Finding 3: Partnerships are vital.

A small but vocal group of interviewees felt that partnerships are vital to gaining support for mobile outreach, specifically to:

- Increase funding opportunities
- Avoid duplicating services and
- Provide comprehensive solutions to a variety of basic needs

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Finding 4: Funding priorities must be reviewed.

Many interviewees weighed Up With Teachers' need against those of other organizations in the city and frankly expressed some concern about where a mobile program might fit in.

However, leadership is already developing new, strong relationships with prospective donors since the study ended. We've initiated many of these, but prospects have also come forward on their own. *[don't discuss who yet]*

It's refreshing to have donors who keep such an ear to the ground!

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Finding 5: Sustainability is important.

Most interviewees noted the importance of sustainability and flexibility to scale the program to match available funding.

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Finding 6: Product marketing is key.

Interviewees said a Up With Teachers mobile outreach program should enhance, not detract from, the flagship store.

- Constituents emphasized the need for stronger, more widespread marketing efforts, with dynamic, humanistic messaging focused on students.

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Now that we've covered the findings, let's move on to results.

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[The marketing agency] identified funds for mobile outreach from among the constituents they interviewed.

- 2 interviewees gave a definite yes, for total gifts of \$75,000.

- 3 offered to discuss a proposal with our leadership. [the marketing agency] estimated a total of \$25,000/year from those three.
- Others either did not indicate they'd give, or said they could not support mobile outreach at this time.

In total, [the marketing agency] identified \$100,000 for the mobile outreach program over 3 years, for \$300,000 total.

Given this total, we had to make adjustments to the project budget and scale.

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[The marketing agency] shared the two best ways to offer a mobile outreach program more affordably and thereby reduce the budget.

1. While we work on raising funds for a fully operational program, we can scale it using volunteer hours. These volunteers will help us deliver the program more affordably as we raise funding.
2. We can continue to develop the kinds of partnerships we have now to help decrease expenses.
[don't elaborate yet]

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We determined that we can move forward by making two strategic adjustments:

1. Develop new partnerships for in-kind and program operations, plus
2. Operate using a mixed-revenue model.

[slide]

First, partnerships. We have a history of strong relationships with devoted partners. Through this process, we have identified some new partnerships that can offset expenses for the mobile program.

- [Grocer] recently renewed a 10-year building rental lease valued at more than \$200,000 per year,
- [Food bank] is a new partner in providing product storage space,
- [Retailer, retailer and a foundation] drive down product costs.

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The next few slides share our strategies for the mixed-revenue model.

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We look at revenue available to support services through the general operating support.

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We look at revenue that is restricted to the mobile outreach program, and we have revenue from fees and other earned income.

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Several long-time donors have told us they will increase their gifts to support a mobile outreach program in addition to the ways they already support Up With Teachers.

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Since the feasibility study, new donors have sought us out about gifts beyond what [the marketing agency] identified in the feasibility research.

- New donors have come forward with new gifts totaling \$22,500,
- Two other new donors invited us to submit proposals for at least \$50,000 starting in 2019.

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At this point, let's take stock of where we are.

- [The marketing agency] has identified \$100,000 in mobile outreach program support.
- We've received \$22,500 in new money for the program – money not identified during the feasibility study.
- We implemented changes that had a positive effect on the program budget.

- We are having productive meetings with partners and potential donors who [the marketing agency] did not interview.

Given all these factors, we believe we can provide a fully scaled mobile outreach program that leverages volunteers and takes full advantage of in-kind gifts with a budget of \$170,000.

Based on the feasibility study and everything we've talked about today, this budget leaves a funding gap.

We're here now to ask if [the funder] will **consider a proposal** to join our list of partners and **fill this funding gap** so we can reach every student in every eligible school who needs us.

[STOP TALKING and wait for questions/comments. Resist the temptation to fill quiet space.]