

COLLABORATIVE FUNDRAISING

A New Concept to Increase Chapter Revenue

CURRENT CHAPTER REVENUE SOURCES

Raffles

Runs

Merchandise Sales

Membership Allocations

TYPICAL RESULTS

Unpredictable

Under Funded

Inefficient

AVERAGE INCOME FOR CHAPTERS

Average Allocation = \$609

Average General Contribution = \$552

Average Merchandise Sales = \$447

WHAT IF WE COULD:

- Make your chapter revenue more predictable?
- Professionalize your fund raising efforts?
- Provide adequate revenue for chapter projects?
- Engage more volunteers?

A NEW APPROACH

- Work hand in hand with the Alliance philanthropy staff
- Engage corporations and foundations in your community on a new level
- Identify potential major donors in your community
- Raise awareness of the Trail and engage more volunteers
- Increase chapter revenue through targeted fundraising

THE NEW MODEL EXAMPLE

Lodi Valley Chapter

- 2017 Budgeted revenue = \$2,950
- 2017 Budgeted Expense = \$8,910
- Revenue Sharing Model = \$5,800
- 2017 Revenue remaining = \$2,450

A STATEWIDE VIEW

Collaborative Fundraising							
Baraboo/Heritage	\$25,000	\$1,500	\$3,500	\$2,000	1	\$32,000	\$3,200
Blue Hills	25,000	1,500	3,500	2,000	1	32,000	3,200
High Point	25,000	1,500	3,500	2,000	1	32,000	3,200
Langlade	25,000	1,500	3,500	2,000	1	32,000	3,200
Marquette	25,000	1,500	3,500	2,000	1	32,000	3,200
Northwoods	25,000	1,500	3,500	2,000	1	32,000	3,200
Superior	25,000	1,500	3,500	2,000	1	32,000	3,200
TOTAL	\$175,000	\$10,500	\$24,500	\$14,000	7	\$224,000	\$22,400
High Point	\$37,000	\$3,000	\$15,000	\$3,000	1	\$58,000	\$5,800
Lodi*	37,000	3,000	15,000	3,000	1	58,000	5,800
Marathon*	37,000	3,000	15,000	3,000	1	58,000	5,800
Portage	37,000	3,000	15,000	3,000	1	58,000	5,800
Rock	37,000	3,000	15,000	3,000	1	58,000	5,800
Waupaca	37,000	3,000	15,000	3,000	1	58,000	5,800
Waushara	37,000	3,000	15,000	3,000	1	58,000	5,800
TOTAL	\$259,000	\$21,000	\$105,000	\$21,000	7	\$406,000	\$40,600
Chippewa Moraine	\$75,000	\$10,000	\$25,000	\$5,000	2	\$115,000	\$11,500
Lakeshore	75,000	10,000	25,000	5,000	2	115,000	11,500
Walworth/Jefferson	75,000	10,000	25,000	5,000	2	115,000	11,500
Washington/Ozaukee	75,000	10,000	25,000	5,000	2	115,000	11,500
TOTAL	\$300,000	\$40,000	\$100,000	\$20,000	8	\$460,000	\$46,000
Dane*	\$100,000	\$20,000	\$100,000	\$25,000	6	\$245,000	\$24,500
Waukesha/Milwaukee	100,000	20,000	100,000	25,000	6	245,000	24,500
TOTAL	\$200,000	\$40,000	\$200,000	\$50,000	12	\$490,000	\$49,000
Overall Total	\$934,000	\$111,500	\$448,000	\$105,000	34	\$1,598,534	\$159,000
Net to Alliance						\$1,439,534	
Foundations						\$250,000	
Membership-YBC						\$250,000	
NPS						\$200,000	
Total						\$2,139,534	

WHAT'S NEXT?

- Everything You Need to Know
 - Saturday, April 14th
 - 3:00-4:15 PM
 - Salon “G”

Collaborative Fundraising

COLLABORATIVE FUNDRAISING

A New Model

For

A New Strategic Plan

CHANGE

If we are going to change the results...
the behavior and the methods must change.
So...let's change and move from success to
significance!

NEW MODEL—KEY ELEMENTS

- This program is voluntary and must be approved by chapter leadership.
- Membership revenue allocations will remain if the amount raised is less than the allocation.
- Chapter training on prospect identification will be provided by the Alliance.
- No one in the chapter will be expected to “ask” for financial support.
- Current chapter revenue from runs, merchandise sales, and raffles will remain the same.
- Grants do not qualify since most of the funds are restricted.

KEY ELEMENTS

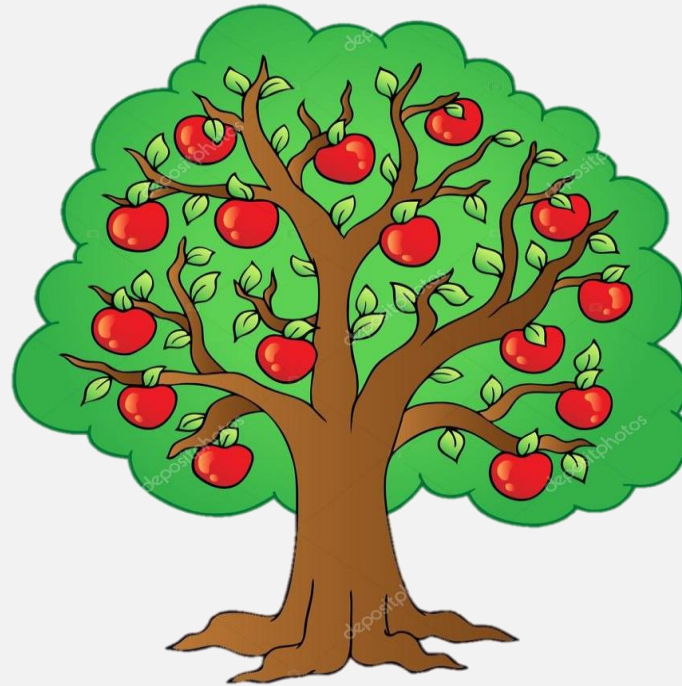
- Revenue identified will be accounted throughout the year and reported to the chapter in a year-end summary.
- If the shared revenue exceeds the traditional membership allocation; the chapter will receive the revenue share, not both.
- Once informed of the revenue share amount; the chapter will submit a budget as to how the revenue will be spent in the following year.
- Any revenue not spent, or budgeted, will be allocated to a State-wide fund for Trail maintenance.
- Collaboration, accountability, and transparency will be critical.

COLLABORATIVE FUNDRAISING – LODI VALLEY CHAPTER EXAMPLE

Current Chapter Allocation	Charitable Gift Annuities	Corporate	Foundation	Individual	Total	10% to Chapter
\$435	\$37,000	\$3,000	\$15,000	\$3,000	\$58,000	\$5,800

GIFT ANNUITIES

Suppose you had an apple tree that you wanted to give away?



But you needed the fruit to have enough to eat



A CASE STUDY

- Female age, 71
 - Money Market account is paying 1%
 - Equities account is up and down
- She wants to feel “secure” in retirement

GIFT ANNUITY ALTERNATIVE

- Gift \$100,000 to the Alliance
- Charitable deduction of \$25,000
- Annuity payout for Female, 71 = 5.1%
- Income = \$5,100 annually for her lifetime
- 96.7% of that income is tax-free for 15 years
 - Effective Annuity Rate = 7.5%

GIFT ANNUITIES

- Safe
 - Lifetime income
 - High payout rates
 - Tax-free income
- Charitable deduction tax savings
 - Peace of mind

CORPORATE OPPORTUNITIES

Employer Name	Location	Industry
Alkar Div	Lodi	Packaging Machinery Mfg
Alkarengineering	Lodi	Packaging Machinery Mfg
Alsum Farms & Produce Inc	Friesland	Fruit & Vegetable Markets
American Packaging Corp	Columbus	Paper exc Newsprint Mills
Associated Milk Producers Inc	Portage	Dairy Product Merch Whls
Cardinal FG Co	Portage	Flat Glass Mfg
Cascade Mountain Ski Area	Portage	All Other Traveler Accommodation
Columbia Correctional Instn	Portage	Legislative Bodies
Columbus Community Hospital	Columbus	General Medical & Surgical Hospitals
Dells Boat Tours	Wisconsin Dells	Scenic & Sightseeing Trans Other
Divine Savior Healthcare	Portage	General Medical & Surgical Hospitals
Everbrite LLC	Pardeeville	Sign Mfg
Fall River Group Inc	Fall River	Iron Foundries
Ferrelgas	Portage	Fuel Dealers
Lexington Logistics LLC	Portage	Surgical & Medical Instrument Mfg
Northwoods Inc-Wisconsin	Portage	Other Social Advocacy Organizations
Penda Form	Portage	All Other Plastics Product Mfg
Poynette Administrative Office	Poynette	Elementary & Secondary Schools
Poynette Elementary School	Poynette	Elementary & Secondary Schools
Robbins Manufacturing Inc	Fall River	Site Preparation Contractors
Saint-Gobain Corp	Portage	Ind Supplies Merch Whls
Schumann Printers Inc	Fall River	Commercial Gravure Printing
Spectrum Brands	Portage	Electromedical Apparatus Mfg
Walmart Supercenter	Wisconsin Dells	Department Stores
Walmart Supercenter	Portage	Department Stores

FOUNDATIONS

- 11 Foundations
- \$101,812 in grants awarded last year

INDIVIDUALS

- Yellow Blaze Club or Greater
 - Need 3

WHAT IF?

- We cannot get \$37,000 in CGA income
- We cannot get \$3,000 in corporate income
- We cannot get \$15,000 in foundation income
- We cannot get \$3,000 from individuals

A SINGLE GIFT ANNUITY

- The minimum gift annuity is \$25,000
- The income to the Alliance is approximately \$6,250
- The chapter Revenue share would be \$625
- \$625 exceeds the current membership allocation by \$190

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WHO WANTS IN?