

Client Service Examples - Confidential
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Redacted to honor confidentiality of proprietary work and client agreements.

1. Sample of a Case Statement I wrote to support a Feasibility Study I conducted

██████████ Case Statement for Endowment Feasibility Study
██████████

Southeast Michigan: Standing Strong

In ██████████, citizens came together to find a way to use their collective generosity, called the ██████████ to improve life in the region. This was the predecessor to the ██████████, known today as the ██████████). Each generation has done its part to provide opportunities for their neighbors. Through the generations ██████████ continues to believe today that everyone, regardless of where they started or ended up, should have the opportunity to be great. In order for a life to change for the better, it sometimes is the access to that one opportunity that makes the difference. We believe in our region, its people and the power of possibilities and creating those opportunities for greatness.

Over the past 100 years the Detroit region led the nation in manufacturing, jobs, education, and much more. It was a vibrant community, led by the likes of Henry Ford and pioneers of the automotive industry. In that same century, however, the region also became a national symbol for urban decline, civil unrest, blight, and more. For those who live in southeast Michigan, the cycle of highs and lows has always been undergirded by resilience, innovation, and hard work.

Perhaps the Detroit ethos is what also makes the region a leader in philanthropy. From a coalition of philanthropic community leaders united in a successful effort to stabilize the region, to grass roots entrepreneurs, Southeast Michigan has benefited by the incredible generosity of individuals, companies, and foundations to provide world-class healthcare, education, arts, and social services, among others.

Rebirth for the Community

There is a rebirth underway in the region. Detroit area leaders and donors are fueling new growth in the region and improving our quality of life. ██████████ has been deeply involved in this journey to renewal. But, Southeast Michigan still faces high poverty rates and educational gaps for our children and adult workforce opportunities. These are huge issues and there are limited resources to meet those challenges.

One of ██████████ special roles is to create opportunities for our most vulnerable to be great, we do this by focusing on healthy kids, early development, student success, stable families, and economic opportunity. With being funded by our community, ██████████ takes extra effort to ensure these efforts and investments pay off by providing rigorous review and outcome-based evaluations of programs.

With such a rich and long-standing commitment to our region, ██████████ is uniquely positioned to be able to bring together the best leaders, thinkers, and resources to collaboratively identify opportunities to address tough community challenges. ██████████ panoramic view of the local community identifies gaps and invests dollars where they are most needed. These investments build pathways for the underserved and promote improved quality of life for all. This is ██████████ legacy and future in southeast Michigan.

Leaders Meet the Challenge of Change

██████████ has faced its own obstacles to progress. For most of its ████████ years in southeast Michigan, ██████████ has relied on the generosity ██████████ giving. Dedicated business leaders have challenged themselves and their company's ██████████. This has been very successful, raising ██████████ dollars for our community.

Everyone is aware that the environment for business has changed in the past decade and so has the field of philanthropy and fund raising. ██████████ reflects the dramatic impact of mobile technology, a global economy, and ways employees do their jobs. ██████████; however, we recognize that donors want and need ██████████ to support the needs of the region.

The ██████████ was a step in that direction. Comprised of ████████ members, each of whom contributes at least ████████ annually, the ████████ raised \$██████████ dollars last year for ██████████ mission and work.

Building Sustainable Funding through Endowment

██████████ have adopted that model, and expanded upon it. Today, some of the most successful ██████████ have also found strong interest in giving to endowment. ██████████ currently has \$██████████ in endowment, most of it board-designated (meaning that the board may use the money as needed).

██████████ is testing the feasibility of a \$██████████ endowment fundraising effort over five years. These are a few details that are being tested, along with that dollar goal:

1. The endowment would largely be donor-designated, the principal would never be spent, and earnings would support ██████████ work in perpetuity.
2. Endowment funds would align with ██████████ core services, mission, and strategic work.
3. Funds would be specific enough to meet donor needs, but flexible enough to meet the changing needs of the community in the generations to come. Again, the donor's gift would be preserved, and only earnings would be used. This becomes a sustainable, predictable source of funds for the future.
4. Gifts to the endowment could take the form of cash, securities, bequests, charitable trusts, gift annuities, retirement assets, property and real estate, life insurance, and other structured gift vehicles. There is also the possibility of donor-advised funds as a source of endowment giving.
5. Those making endowment gifts of \$██████████ or more would be recognized by membership in the ██████████ and celebrated in ██████████.

██████████ also has the option of using the Community Foundation of Southeastern Michigan as a repository for some of its endowment funds, if a donor chooses to use that vehicle.

Volunteer Leadership and Philanthropy

Several leading business and civic leaders, as well as the ██████████ Board of Directors, have given their support to the concept of a \$██████████ endowment fund. They understand the

importance of sustainable funding to meet current needs and address future needs in our community. [REDACTED]
[REDACTED] understands that creating opportunity for all to live a great life takes the participation of everyone.

Creating long-lasting change requires a long-standing commitment. Our donors have demonstrated both the willingness and great loyalty to invest their charitable dollars into our community. Though annual gifts are essential, we need to ensure [REDACTED] can keep meeting the evolving needs of future generations. Endowment is a very valuable way for a donor to give metro Detroit's vulnerable children and families a fighting shot. By giving to endowment, a donor ensures that his or her values will continue for their children, their grandchildren, and the millions who make this community their home for years to come.

Summary – Findings and Results of the Feasibility Study connected with the above case statement

Key findings in the study included the following:

1. [REDACTED] has a positive reputation and is a trusted leader. [REDACTED] is viewed as having [REDACTED] position in the community to bring leadership together for collaboration and problem solving. Participants expressed optimism for the leadership of the CEO while indicating some impatience at better understanding a clear vision for the future.
2. [REDACTED] enjoys access to loyal supporters at key levels. Many of the stakeholders interviewed have been donors, volunteers, and board members for [REDACTED] for many years. There is a significant level of business leadership engaged with [REDACTED]
3. The donor market has changed in the past decade with the rapid growth of technology for fundraising and the amount of information available for scrutiny of nonprofits. Donors demand transparency of financial records and clear measurement of the impact and results of their giving. They expect a high level of professionalism by fundraising staff and other executives. Interviewees indicated [REDACTED] has need for improvement in all of these areas as a way to remain relevant and compete with other nonprofit fundraising.
4. Other key areas for improvement include building deeper relationships with donors, a broader reach in the donor base, and focus on [REDACTED] priorities. [REDACTED] is a source of success that participants applauded and suggested future efforts support.
5. Endowment [REDACTED] strong support among the participants interviewed. That support could be developed over time, but it clearly does not exist now in a broad sense.
6. [REDACTED] is moving into a different space with an endowment emphasis. The support for such a strategic move is weak and underdeveloped. This is a new [REDACTED] in the minds of many and that takes time to understand and embrace.
7. The gift table that tested potential giving clearly indicated that [REDACTED] ready for an endowment campaign in the near future.

Based on these findings, counsel offers the following recommendations for consideration by [REDACTED]:

1. [REDACTED] to successfully undertake an endowment campaign within the next year.
2. A quiet phase of campaign preparation is recommended, which could help change positioning to a positive reception. This includes conversations with leaders, education about endowment, articulation of the impact of endowment funds, the ability to serve donor interests through endowment, and proper staffing for the initiative. A successful period of preparation could allow [REDACTED] to consider moving into an active campaign mode or building endowment in other, less obvious ways.
3. [REDACTED] needs to prioritize deeper relationship development by the executive team and the board of directors. This is to start the conversation about endowment, but it is also about focusing [REDACTED]

message, responding the donor and community concerns and opportunities, and positioning for [REDACTED] as the critical nonprofit organization in the community that solves problems that matter.

4. **Conversations need to begin with those capable of making pacesetting gifts for endowment.** These conversations typically take place over a period of months and even years. With the impact of significant pacesetting gifts, the broader [REDACTED] donor base could be involved more realistically.

2. I wrote this description for a Fund Development Task Force I developed along with the CEO and senior staff, with the results of a new, permanent Committee and recruitment of members

Fund Development Task Force
 Approved - June 24, 2019

Charge
The Chair of the Board of Directors (BOD) appoints a Fund Development Task Force to review [REDACTED] current fundraising model and practices, understand and make recommendations for revising [REDACTED] board's role and direction for philanthropy.
Responsibilities
The Task Force is to: <ul style="list-style-type: none"> • Describe [REDACTED] current fund development structure and impact; • Consider the role of the board in fundraising as it relates to best practices in the field; • Determine options for structure, direction, and growth; and • Brings recommendations back to the full BOD for consideration regarding how [REDACTED] [REDACTED] might revise its structure and practices for fund development.
Outcomes
The board desires: <ul style="list-style-type: none"> • A descriptive model for governance and staff regarding fund development, so that it may be fully informed for decision-making regarding [REDACTED] opportunities for growth; • Projections of revenue and expenses over a three-year period; and • Recommendations for revision of BOD structure relating to fund development.
Timeline
<ul style="list-style-type: none"> • The task force will be appointed in June 2019. • The BOD requests the work be completed by September 10, 2019.
Composition
<ul style="list-style-type: none"> • The task force will be comprised of at least two current members of the board and may be supplemented by non-board members appointed by the chair. • The group will meet at least two times in-person and/or by teleconference.