



Fundraising Strategies Initial Action Plan

Fundraising Strategies

1. Go after large donations, \$5,000+
2. Jacupke golf tournament
3. Leverage captive audience
4. Apply for grants



Tactical Approach

- Message
- Discovery
- Development
- Amplify





Large Donations, \$5,000+

- Message: Legacy, preservation, pay it forward
- Discovery: Identify audiences, opportunities
- Development: Develop requests, communication channels
- Amplify: Make the ask, communicate, publicize



Large Donations, \$5,000+ Leader/Volunteer Commitment

- Identify potential donors who have capacity to give within your circles of influence – both inside and outside IIAN
- Continuing/Renewed Personal Financial Support – to show commitment to the Talent Network program (it's hard to ask for \$\$\$\$ if leaders do not support the Foundation)



Golf Tournament

- **Build on past success!!**
- Message: Fun, entertaining, charitable
- Discovery: Start, stop, modify
- **Development: Committees, sponsorship opportunities, monetize new efforts**
- Amplify: Make the ask, advertise, recruit, communicate, publicize



Golf Tournament Leader/Volunteer Commitment

- Pro-actively recruit sponsors
- Promote tournament participation within your organization and circles of influence
- Volunteer for sub-committees of interest – Fundraising, Tournament Staging, etc.



Leverage Captive Audiences

- Message: Community, activate, engage, inspire
- Discovery: Segment audiences, identify needs
- Development: Social media editorial calendar, email marketing, drip marketing, quarterly fundraising
- Amplify: Make the ask, communicate, share experiences



Leverage Captive Audiences Strategies – Staff-Driven

- Develop social media campaigns
- Email: Drip marketing (new web-based CRM/email software purchased Aug. 2017)
- IIAN Conventions – raise awareness, encourage involvement
- May need to work with fundraising/marketing experts to build campaigns



Apply for Grants

- Message: Expand awareness within industry
- Discovery: Grant experience, find individual and corporate opportunities
- Development: Write templates, create grant calendar, establish long-term process
- Amplify: Make the ask, communicate, publicize



Apply for Grants

- **Leader/Volunteer Commitment**

- Identify insurance industry foundations/opportunities within your circles of influence – both inside and outside IIAN

- **Strategies – Staff Driven**

- Raise awareness with members, larger audiences
- Research available grants
- Develop grant “template”, applications
- Develop “action calendar”

Time to git 'er done!

1. Mobilize Foundation Board
2. Form Committed Fundraising Committee
3. Set Priorities
4. Develop 2017-18 Plan/Strategies/Timetable



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