



IIAN Foundation

Show me the MONEY!

Fundraising Strategic Planning Day – April 27, 2018

Dee Sykora: President

Dave Chastain: Fundraising Chairman

Golf Tournament Co-Chairs: Mike Glaser, Tom Greco

Foundation Directors:

Greg Donsbach

Jeffrey Ewen

Bob Marshall

Carol McClelland

Jay Sillau

Chad Thies

IIAN Staff:

Kelli Backman

Jeremiah Gudding



IIAN Foundation Mission – 2009



To **promote the independent insurance profession** to prospective and current insurance industry members through its resources, education, and public awareness.

IIAN Foundation Vision



To be the premier organization for the **promotion of the independent insurance industry as a profession of choice** for prospective and current agents and other industry professionals.

- The IIAN Foundation offers a **program of scholarships** for potential new industry professionals.
- The IIAN Foundation supports **high quality training and opportunities for potential new industry professionals.**
- The IIAN Foundation promotes a **positive perception of the industry** through public awareness and education.
- The IIAN Foundation supports high quality and timely **higher education offerings for existing industry professionals..**

Fundraising Strengths, Weaknesses, Opportunities & Threats



Strengths

- Golf Tournament
- Staff
- Core Board Leaders
- Captive Audience

Weaknesses

- Communication - ALL IIAN Members
- Member Engagement/Understanding
- Low Board Engagement/\$\$ Support
- No Clear Elevator Speech/Value Proposition



Opportunities

- Member Engagement/Nextgen
- Value Proposition – What Are We Doing For Independent Agencies & Industry?
- Partnerships – Outside Industry



Threats

- Competition from other Non-Profits
- No 'Bleeding Heart' Cause



What's Next?

- **New Fundraising Initiatives For 2018 - 2019**
 - Silent Auction – Pump It Up!
 - Online/Live – Need Bidding App Software
 - New Stand-Alone Event
 - Top Golf! (Late 2019), Or
 - Large Gala – co-brand with Kids Chance of Nebraska



What's Next?

- **New Fundraising Initiatives For 2018 - 2019**

- Large Donor Program
 - Board Involvement/Support
 - Targeting & Courting “Whales”
- IIAN Member Engagement/Support
 - Revamped Giving Program
(Old Academic Leadership Circle)
 - IIAN Dues Check-Off - \$50 Per Agency
 - Board Challenge – Who Can Raise The Most?
 - Social Media Challenge (Fireball)





INDEPENDENT INSURANCE
AGENTS OF NEBRASKA
Foundation



INDEPENDENT INSURANCE
AGENTS OF NEBRASKA
Talent Network
iiantalentnetwork.org

Foundation OVERVIEW

Show me the MONEY!

Goals – 2017-2021

- Support Talent Network program in partnership with IIAN
- Achieve annual fundraising \$\$ goals

2017-18

BUDGET GOAL: \$45,240

- OCTOBER, 2017 GOLF TOURNAMENT
RAISED: **\$22,626**
- FEBRUARY, 2018 SILENT AUCTION – WINTER CONFERENCE
RAISED: **\$ 5,310 + \$365** RING TOSS
- IIA – OMAHA BOWLING FUNDRAISER/
LANCASTER COUNTY MATCH
BUDGET GOAL: **\$3,700**
- **FUNDRAISING PLANNING DAY - APRIL 27, 2018**
- ACADEMIC LEADERSHIP CIRCLE – RENEW BOARD COMMITMENT, REVAMP & REBRAND
BUDGET GOAL: **\$20,000**
 - LARGE DONOR CAMPAIGN – GEAR UP
- TOTAL REVENUE – 8 MOS (4/30/18): **\$ 30,057**
- CONTRIBUTED TO TALENT NETWORK: **\$ 29,860**

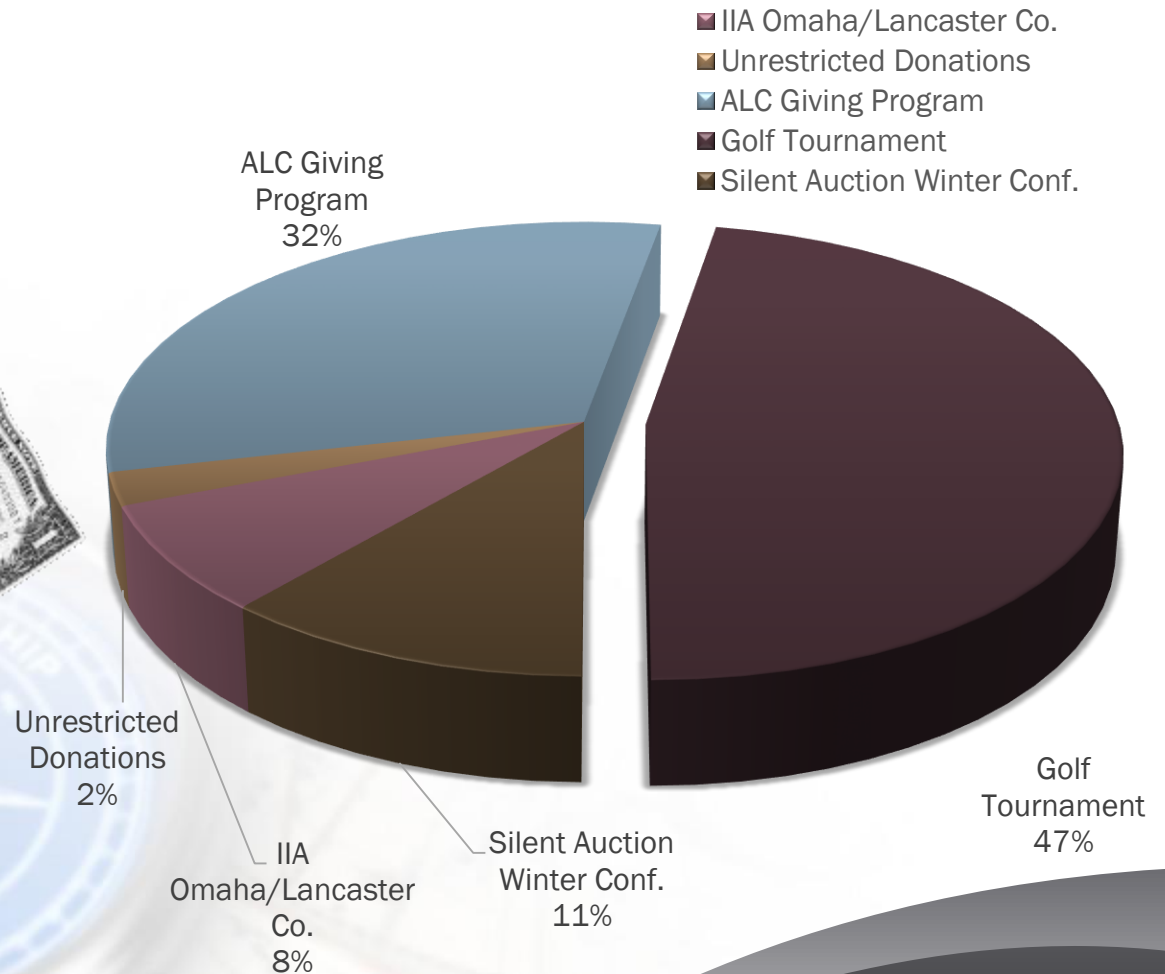
2018-19

GOAL: \$48,663.00

- OCTOBER 10, 2018 GOLF TOURNAMENT
GOAL: \$25,000
- **WHAT'S NEXT?**



2017-2018 Income Budget



2018 Golf Tournament



Goal is: **\$25,000**

Date: October 10, 2018

Location: Wilderness Hills Golf Course



What's Next?

- **Key Success Strategies**

- Develop Value Proposition for Giving
 - Rebrand – Example: “Fund Your Future”
 - Benefits of Talent Network Program To:
 - Independent Agency System
 - Member Agencies & Companies
- Ramp Up Communications – Talent Network & Foundation
 - Social Media, Email
 - Annual Report



What's Next?

- **Key Success Strategies**

- Activate The Boards/Volunteers
 - Involvement/Support – Fundraising Initiatives
 - Active Sub-Committees
 - Targeting & Courting “Whales”
- Promote IIAN Member Engagement/Support
 - Revamped Giving Program
(Old Academic Leadership Circle)
 - IIAN Dues Check-Off - \$50 Per Agency
 - Social Media Challenge (Fireball)



Planning Timeline

FY: 9/1/2017 – 9/1/2018 in Review



Q1:

Sept, Oct, Nov

- Final promo for Oct 11 Golf Tournament
- Oct 11 Golf Tournament - record breaking attendance
- Raised \$22,626

Q2:

Dec, Jan, Feb

- Jan - Decided to host new Silent Auction at IIAN Winter Conf.
- Jan - recruited sponsors, auction prep
- Feb 20 Silent Auction
- Raised \$5,675

Q3:

March, April, May

- April 27 Foundation Fundraising Strategic Planning Day
- Oct 10, 2018 Golf Tournament - planning

Q4:

June, July, Aug.

- June 20 - Update with IIAN Board
- Renew Annual Giving \$\$\$ (ALC)
- Recruit Golf Sponsors
- Finalize plans & budget for 2019 Fundraising
- IIAN Dues Check Off



We are **66%** of the way to our needed **\$45,250 By 8/31**

Planning for the Future

FY: 9/1/2018 – 9/1/2019



Q1:

Sept, Oct, Nov

- Oct 10 - Golf Tournament
- Plan Silent Auction
- Large Donors – Marketing Plan, Identify Whales, Sales Calls

Q2:

Dec, Jan, Feb

- Recruit Auction Sponsors
- Prep For Silent Auction
- Identify Whales, Make Sales Calls

Q3:

March, April, May

- April 3-4- Winter Conf. Silent Auction?
- Oct 9, 2019 Golf tournament planning
- Planning Day; Top Golf Event (Early 2020?)

Q4:

June, July, Aug

- Renew Annual Giving \$\$\$ (ALC)
- Recruit Golf Sponsors
- Finalize plans & budget for 2020 Fundraising
- IIAN Dues Check Off

ONE TEAM. ONE PURPOSE





Questions? More Information?

Kelli Backman

Kelli.backman@biginebraska.org

8231-B Northwoods Dr.

Lincoln, NE 68505

O: 402-476-2951

C: 402-613-2570