



Jeffrey Byrne
+ Associates, Inc.

Monday, June 19, 2017

Stefany Williams, President and Chief Executive Officer
Goodwill of Western Missouri and Eastern Kansas
1817 Campbell Street
Kansas City, Missouri 64108

Sent Via Electronic Mail to swilliams@mokanGoodwill.org

Dear Stefany:

Thank you very much for reaching out to me and Jeffrey Byrne + Associates, Inc. about Goodwill of Western Missouri and Eastern Kansas and your desire to formalize and increase your resource development activities, with an eye on launching a capital campaign. Bruce Broce and I enjoyed our visit with you. We gained an appreciation for your vision and goals for a new campus and obtained an understanding of expanded programs that will bring greater benefit to those you serve.

Goodwill's commitment to empowering people with disadvantages and different abilities to earn and keep employment through individualized programs and services makes our community a better place to live. Our firm would be honored to work with you to strengthen the future of Goodwill, and help leverage you and your leadership team's passion into fundraising success.

Based on our discussion, I propose the following seven components for Goodwill over a period of nine (9) months. This will include approximately five months of due diligence work to position Goodwill for a campaign and approximately four months for a Feasibility Study for the new campus project to include the launching of Inner Family solicitations in support of the campaign:

- 1. Developing a Case for Support**
- 2. Brand Consultation**
- 3. Communications Mechanism**
- 4. Personal Interviews with Stakeholder Foundations**
- 5. Establishing a Formalized Development Department + Resource Development Plan**
- 6. Board Training in Resource Development**
- 7. Feasibility Study and Launching Inner Family Solicitations**

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1. Developing a Case for Support

To support the visits with stakeholder foundations, future fundraising efforts and ultimately a campaign, JB+A will guide the development of a Case for Support for Goodwill. This piece will describe vision, mission, history, programs and services, documented success in meeting mission, current needs and projected outcomes once needs are met.

This Case will place Goodwill programs in front of interviewees (please see below) to determine their awareness and opinion of the organization and its programs. Feedback gathered will not only help ascertain the perceived value of these programs, but will also help Goodwill determine which programs to position and present for specific funding opportunities.

JB+A will develop final recommendations and help modify and strengthen the Case based upon input obtained from interviewees. The finalized Case will also serve as a basis for the development of additional fundraising materials.

2. Brand Consultation

JB+A will serve as a liaison between Goodwill and Novella Brandhouse to provide a consultation on brand identity. As a creative marketing and branding agency, Novella Brandhouse works with organizations in devising brand strategy (identifying target audience, goals and positioning), designing how a brand looks, writing the brand narrative and setting style guidelines to ensure branding remains consistent. Just as we learned in our meeting with you, there is so much more to Goodwill than just its donation and retail operations. Accordingly, we think there exists an incredible opportunity to educate citizenry and potential supporters about ALL of the innovative approaches and programs it leads. A strong brand identity will be critical to Goodwill as it looks to more effectively communicate its mission and programs, strengthen its resource development capacity and ultimately launch a capital campaign. JB+A has strategically partnered with Novella Brandhouse on several client engagements.

3. Communications Mechanism

As previously stated, Goodwill's reputation is strong, but audiences most readily identify with Goodwill's in-kind donation and retail activities and do not fully understand how its mission is tied to employment. JB+A will help Goodwill develop a communications mechanism that can be used across multiple platforms (website, social media, brochures, newsletters, presentations, fundraising appeals) to clearly illustrate the encompassing nature of its programs and services. Consistent and widely distributed messaging about Goodwill's career programs and employment services will help grow its audience, convert them to donors and generate anticipation about exciting things to come.



4. Personal Interviews with Stakeholder Foundations

In order to vet its Case for Support and gain a greater vantage point on the perception of Goodwill from external sources, your JB+A consultants will conduct a “listening tour” and interview five to eight (5-8) local Foundation representatives. These visits will also allow us to gather insights and feedback important to establishing the direction of the Development Department, Resource Development Plan and pre-campaign planning and positioning. These personal interviews allow us to obtain a snapshot of the knowledge and image of Goodwill from those with the capacity to provide major support.

5. Establishing a Formalized Development Department + Resource Development Plan

We will first conduct a Development Assessment to review the current resource development activities and giving trends. We look at the organizational functions necessary to measure capacity for increased fundraising. Specifically, these areas include:

- Organizational budgets for three to five years
- A detailed review of your giving histories for the last five years
- A review of the resource development budget
- The goal-setting process for fundraising
- Board member involvement in the fundraising process
- Review of volunteer programs
- Communications plans and strategies

We will review your previous/existing fundraising and communication materials as well as existing plans for long-term sustainability and financial projections. The findings of the Assessment serve as the basis for a Development Department infrastructure and Resource Development Plan that will ensure the necessary people and systems are in place to support growth in philanthropic income.

Goodwill’s Plan will serve as a “road map” with timelines and accountabilities to formalize fundraising activities and specifically address the following components:

- Infrastructure recommendations to enhance capacity building
- Annual gifts, major gifts and planned giving
- Corporate and foundation grants
- Public funding opportunities
- Special events
- Volunteer outreach, engagement and management
- Donor stewardship and recognition
- A calendar of annual fundraising activities to accomplish growth recommendations
- A proposed budget for implementation of the Resource Development Plan



6. Board Training in Resource Development

JB+A will develop and conduct a resource development training program for members of the Goodwill Board of Directors and key staff. Specific curricula and materials for the session will be developed with Goodwill, to align with activities contained in the Resource Development Plan and to help prepare for a future capital campaign. This program will include an overview of the Development Office's annual Resource Development Plan, followed by a facilitated discussion to fully understand the objectives, activities, timeline and accountabilities outlined in the plan and how the plan will support increased fundraising capacity for Goodwill.

This training will focus on best practices in fundraising, empower your organization to fundraise and teach strategies for engaging in fundraising. To lay a proper foundation, the training will include a "back-to-basics" look at Board functions and fundraising, how Goodwill compares to peers in fundraising results and strategies and, most importantly, a discussion that energizes your Board and staff to understand how they can actively contribute to your organization's sustainability and growth through fundraising.

7. Feasibility Study

During the latter half of the engagement, JB+A will conduct a Feasibility Study to specifically prepare for a capital campaign for the new Goodwill campus and launch solicitation of Inner Family gifts.

JB+A will help develop a **concept paper** for the campaign that will describe the new campus project and the campaign's goals in an accurate and compelling way. This piece will clearly and concisely describe the motivation and rationale for Goodwill's new campus and how the project will help it continue to fulfill its core purpose. This concept paper will be shared with select stakeholders (prospective donors and key community leaders) during the Community Input/External Assessment portion of the Study and will be revised/finalized for campaign use based upon feedback.

Goodwill will need a prospective donor base sufficient to support its fundraising goal for the capital campaign. JB+A will work with Goodwill to review its database to help identify, connect with and uncover the capacity of the prospective donor pool for the campaign.

As an additional service for fee, JB+A will engage a donor wealth screening service (such as DonorSearch or Blackbaud Target Analytics) on behalf of Goodwill to conduct a **database screening** to help it identify and target its top-tier prospective donors. Goodwill will maintain the results of the screening and, with the assistance of JB+A, incorporate it into fundraising planning for the campaign.



JB+A recommends the formation of a five- to -seven-member **Campaign Planning Committee**, to support the objectives and activities of the campaign planning processes. This group would consist of members of the Board of Directors and volunteers who will lend their time, talent and treasure to assist with the planning and ultimately, the campaign. Members of the Committee will provide feedback about the concept paper, help identify and prioritize prospective interviewees and generate dialogue about the interview topics and offer its best judgement as to appropriate approaches and strategies for pre-campaign and campaign activities. Typically, members of this group will transition into the Campaign Steering Committee who will oversee the campaign.

JB+A will lead the processes to prepare for the External Assessment portion of the Study such as **identifying and prioritizing prospective interviewees, developing interview topics, creating interview invitation cover letters and follow up correspondence and scheduling interviews.**

During the External Assessment, JB+A will **interview 10-15** of Goodwill's top donors/prospects and leaders and key influencers in your organization, the marketplace and the greater community to determine the level of commitment to the campaign and where they place the organization among their giving priorities, including an evaluation of likely financial support and an assessment of potential campaign leadership.

The personal interviews will help Goodwill and counsel have a clear understanding of the following areas, critical to the success of your future campaign and ongoing fundraising efforts:

- General knowledge and perception of Goodwill and its image among its constituencies and stakeholders
- Response to the overall proposed project and campaign
- Receptivity of private fundraising efforts for the project
- Reaction to the projected campaign goal
- Identification of multiple funding sources, including individuals, corporations and foundations
- Availability of lead and large gifts
- Availability of leadership for the campaign
- Timing and strategy of the campaign, including the general fundraising environment and potentially competing efforts

The findings of the External Assessment, including observations, recommendations and confidential addenda of appraised prospective campaign donors and leadership, are compiled into a **Final Report** presented to the Board and other designated organizational leadership. A **Campaign Action Plan** with month-to-month timelines and accountabilities, a gift chart, an organizational chart and strategies specific to



Goodwill will serve as the road map for planning and implementation of the campaign.

The campaign begins with the **Inner Family solicitations**. The Inner Family consists of Board members, staff and the Campaign Steering Committee. This “campaign within a campaign” should report success in reaching not only a participation goal, but a monetary goal as well. It is important that the Inner Family demonstrate significant financial commitment, as outside prospects will view the success of the Inner Family as they evaluate their own commitments. The Inner Family should adopt a goal of no less than 100% participation and set its fundraising goal. Recent successful fundraising efforts have shown Inner Family campaigns that provide anywhere from 15% - 35% of the campaign goal. JB+A will support Goodwill in launching its Inner Family phase of the campaign, to ensure a solid foundation and good momentum for the campaign.

Timeline

A project schedule, which can be modified to fit your availability and needs, follows:

Activities	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Develop the Case for Support	█	█							
Brand Consultation	█								
Communications Mechanism	█								
Personal Interviews with Foundation Stakeholders									
Interviewee list created	█	█							
Interview content developed	█	█							
Interview invitations letters sent/interviews scheduled		█	█						
Interviews conducted		█	█						
Thank you letters sent			█						
Formalize Development Department/ Resource Development Plan			█	█	█	█			
Board Training						█			
Feasibility Study									
Campaign Planning Committee									
Identify, recruit and onboard Committee members						█	█		
Meetings						█	█		█
Concept Paper						█	█		
Constituency Database Wealth Screening						█	█		
Personal Interviews									
Interviewee list created						█	█		
Interview content developed						█	█		
Interview invitations letters sent/interviews scheduled							█	█	
Interviews conducted							█	█	
Thank you letters sent								█	
Campaign Action Plan + Timeline									
Campaign Action Plan + Timeline presented to Board for approval									█
Finalize Campaign Steering Committee									█
Inner Family Solicitation Launch									
Begin cultivation and solicitation of Board, staff and Campaign Steering Committee									█



Fees for Services

For the scope of work that includes the following seven components, JB+A proposes a nine-month engagement for \$10,000 per month for total fees of \$90,000.

- 1. Developing a Case for Support**
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Any reasonable travel expenses incurred by JB+A consultants outside the greater Kansas City area, including airfare, mileage and hotel accommodations, will be charged separately as incurred, although none is anticipated for this engagement.

You are undoubtedly seeking to partner with a fundraising consulting firm who shares your ability to turn vision into reality – a firm knowledgeable in all areas of fundraising, who understands the philanthropic landscape of Kansas City and beyond and has a demonstrated history of success.

JB+A is just that firm. Founded in Kansas City, Missouri, in 2000, our team of consultants has successfully helped more than 330 nonprofit organizations across the United States raise more than \$1,300,000,000. We also view ourselves as partners in your fundraising endeavors by offering you several distinct advantages:

- A customized approach to each agreement assuring that the unique demands of Goodwill are met by tailoring our services to your needs
- Direct “hands-on” involvement in your scope of work by senior members of our firm
- An attitude and methodology that will help your organization grow in the areas of financial development and organizational fundraising planning for the future; we train Board members and staff to continue these processes long after our work is concluded
- A team approach to fundraising counsel; this comprehensive, collaborative approach produces harmony between the components of an engagement: access to speak with team members, thorough research in matching client needs with consultant experience, marketing and administrative support, direct counsel, grant research and writing, prospect qualification and more.

In every client engagement, we take our responsibilities seriously: we are transparent about our goals and tactics, we meet with our clients on an ongoing basis, we openly



share successes and challenges and we encourage two-way conversation. We would do the same with you and Goodwill.

Thank you again, Stefany, for the opportunity to present our services. Please let me know if there is additional information JB+A can provide to assist with your decision-making process.

Sincerely,



Jeffrey D. Byrne
President + CEO

cc: Bruce Broce

