TELLING YOUR STORY:
WHAT, WHERE, WHY, WOW, &
TO WHOM

JIM KITCH
ADI MOBILE HEALTH
WHAT

• Do you know what your clients, funders, partners want?
• What is in it for them?
• How can you educate and bring value to them?
• How do you prove your worth/value?
• Why should they be your funding partner? Vendor? Patient?
WHAT DO YOUR CLIENTS, FUNDERS, VENDORS WANT?

- Do you understand what your clients want?
- People make emotional buying decisions and back it up with logic.
- We can educate and bring value to them.
WHAT IS IN IT FOR THEM?

• WHY SHOULD YOUR CLIENTS, VENDORS, FUNDERS INVEST IN YOUR OPERATIONS?
• WHAT IS THE VALUE OF THEIR PARTICIPATION? – MONETARY, IN-KIND, ADVERTISING, MANPOWER
• HOW DO YOU COMMUNICATE THAT VALUE AND APPRECIATION OF THE INVESTMENT?
How do you educate your partners and the community?

- Are your operations viewed in the community as an authoritative resource?
- Do you engage the public and community in education marketing?
  - Local media
  - Youth clubs/centers/schools
  - Professional organizations
  - Local EMS/emergency management
### 2013 Fund Drive

**Lion:** $100,000
- Mr. & Mrs. Walter Zither
- R. Calder
- Dan & Connie Floog
- Mr. Roger Vokel
- Mrs. C. Galster

**Cheetah:** $50,000
- Virgil Minto
- Mr. & Mrs. T. Foldor
- Sandy Drimmer
- Mr. & Mrs. Howard Gilph
- Don Simkriell

**Grizzly:** $25,000
- Steve & Barb Fimbler
- Dick Vulker
- Erin & Bill Valachek
- Vicki Stanford

**Raccoon:** $10,000
- Sam & Tina Krunker
- The Jenkins
- Mr. & Mrs. McConnell
- The Andergans
- The Miller Family

**Buzzard:** $1,000
- Vi and Her
- Sam, Max, & Ted
- Mr. & Mrs. T. Foldor
- The Ming Family
- The Allison Family

**Chipmunk:** $2,000
- The Andersons
- The Simpsons
- The Miller Family

**Cockroach:** $500
- Ted & Kim Dachshund
- Edna Perminnick
- The Quixote
- The Enrigo Family
- The Von Trappe Muppets

**Grub:** $100
- The Noble Family
- The Kings
- The Giles
- The Perkins
- The Dixons
- The Allison Family

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**The Oakdale Church updates its new wildlife-themed donor levels.**
HOW DO YOU PROVE YOUR WORTH?

- Do you have regular communications/updates to your investors – clients, vendors, funders?
- Do you share success and impact stories – personal patient care stories?
- Do you quantify the value of services provided to the community? These can be:
  - ER visits avoided
  - Number of patients seen in after hours clinics that don’t have any other venue
  - $$, $$$ value of care given in a week, month, year
WHY SHOULD I BE YOUR PATIENT, VENDOR, FUNDING PARTNER

- WIIFM – WHAT IS IN IT FOR ME?
- PATIENT
  - CONVENIENT HOURS
  - AFTER HOURS/WEEKEND HOURS
  - CULTURALLY COMPETENT AND COMPASSIONATE STAFF
- VENDOR
  - MAKING A DIFFERENCE
  - RECOGNITION OF DISCOUNTS/SPECIALS – BECAUSE OF YOUR DISCOUNT OR PURCHASING PROGRAM WE WERE ABLE TO TAKE THE DIFFERENCE AND ENHANCE XYZ.
Hey, wait a second, Eileen... I don't think he's selling insurance after all. This little guy needs to make an appointment.

Have plaque!! Have plaque!!
WHY SHOULD I BE YOUR PATIENT, VENDOR, FUNDING PARTNER

- FUNDING PARTNER
  - YOUR FUNDING ENABLED US TO:
    - EXPAND OUR HOURS
    - EXPAND/ENHANCE PROGRAMS
    - CONTINUE EXISTING PROGRAMS
    - ENGAGE NEW GEOGRAPHIC LOCATIONS
    - ENGAGE NEW CLIENT POPULATIONS
"I don’t like getting my hands all yicky, Mrs. Ergard, so I do all my dental work using drones now."
WHERE

WHERE DO WE TELL OUR STORIES?

- YOUR INTERNAL STAFF
- YOUR EXISTING PATIENTS
- YOUR VENDORS
- YOUR FUNDING PARTNERS – EXISTING AND POTENTIAL
- LOCAL BUSINESS COMMUNITY
- LOCAL MEDIA COMMUNITY
- LEGISLATORS – LOCAL, STATE, FEDERAL
INTERNAL STAFF

- DOES YOUR STAFF KNOW YOUR HISTORY, STORY, MISSION?
- CAN THEY RETELL THE STORY ACCURATELY?
EXISTING PATIENTS

- DO YOUR EXISTING PATIENTS KNOW YOUR STORY?
- DO YOU ACTIVELY SOLICIT HELP FROM YOUR PATIENTS?
- DO YOU SHARE YOUR NEEDS WITH PATIENTS?
VENDORS

- Do your vendors know your story?
- Do you share your needs with your vendors?
- Do you ask your vendors to check your account to make sure you are getting the maximum benefits, discounts?
- Are you participating in your vendors’ Non-Profit Purchasing Programs?
FUNDING PARTNERS

- DO YOUR EXISTING AND POTENTIAL FUNDING PARTNERS KNOW YOUR STORY?
- DO THEY KNOW THE IMPACT THEIR INVESTMENT HAS MADE IN THE COMMUNITY?
- HAVE YOU SHARED SPECIFIC PATIENT IMPACT STORIES?
- HAVE YOU SHARED SPECIFIC HEALTHCARE SYSTEMS IMPACT?
LOCAL BUSINESS COMMUNITY

- DOES THE LOCAL BUSINESS COMMUNITY KNOW YOUR PROGRAM EXISTS?
- DO YOU HAVE REGULAR CONTACT WITH THE CHAMBER OF COMMERCE, ROTARY, KIWANIS, OTHER CIVIC ORGANIZATIONS?
- HAVE YOU COMMUNICATED YOUR NEEDS – BOTH MONETARY AND IN-KIND?
MEDIA COMMUNITY

- DOES YOUR LOCAL MEDIA COMMUNITY KNOW YOUR PROGRAM?
- DO YOU HAVE SPECIFIC CONTACTS AT LOCAL RADIO AND TV STATIONS?
- DO YOU HAVE SPECIFIC CONTACTS AT LOCAL NEWSPAPERS?
- DO YOU HAVE REGULAR CONTACT WITH THESE PARTIES?
- DO YOU PARTICIPATE IN “ASK THE EXPERT” INTERVIEWS?
LEGISLATORS – LOCAL, STATE, FEDERAL

• DO YOUR LEGISLATORS (AND THEIR STAFFERS) KNOW YOUR PROGRAM?
• DO YOUR LEGISLATORS KNOW THE IMPACT YOU MAKE IN THE LOCAL COMMUNITY?
• DO YOUR LEGISLATORS KNOW SPECIFIC PATIENT IMPACT STORIES?
“I sentence you to one year in prison, or 200 hours of community service as a practice patient for dental students.”
WHY

• WHY SHOULD YOU ENGAGE THE PREVIOUS MENTIONED GROUPS?
• WHAT IS THE IMPORTANCE OF REGULAR ENGAGEMENT?
• WHAT VALUE DOES IT BRING TO YOUR OPERATIONS?
• WHAT IS IN IT FOR THEM?
WOW

- HOW DO WE WOW THE PEOPLE WE ARE TELLING OUR STORIES TO?
- WHAT MAKES YOUR PROGRAM OR ORGANIZATION UNIQUE?
- WHAT IS YOUR “SECRET SAUCE”?
WHO ARE WE TELLING OUR STORIES TO:

- STAFF
- PATIENTS
- VENDORS
- LOCAL BUSINESS COMMUNITY
- LOCAL MEDIA COMMUNITY
- LEGISLATORS – LOCAL, STATE, FEDERAL
- EVERYONE!
10 MINUTE BREAK
ELEVATOR PITCH

• 2-4 SENTENCES
• WHAT IS YOUR HOOK? (“DID YOU KNOW…?”)
• WHO YOU ARE
• YOUR SOLUTION
• “WOULD YOU LIKE TO LEARN MORE?”
FUNDRAISING RESOURCES

- GRANT/FOUNDATION RESEARCH
- LOCAL FUNDERS RESEARCH
- DEVELOPING CORPORATE PARTNERSHIPS
- PROFESSIONAL FUNDRAISING ORGANIZATIONS
GRANT AND FOUNDATION RESEARCH

- DISCLAIMER – THIS IS NOT AN ENDORSEMENT OF ANY ONE SERVICE JUST SHARING OF INFORMATION BASED ON PERSONAL EXPERIENCE
- CD RESOURCES
- FOUNDATION CENTER
<table>
<thead>
<tr>
<th>Foundation Name</th>
<th>City, State</th>
<th>Total Assets</th>
<th>Total Giving</th>
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<tbody>
<tr>
<td>Old Way of Central Alabama, Inc.</td>
<td>Birmingham, AL</td>
<td>$90,981,061</td>
<td>$31,378,249</td>
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<td>Community Foundation of Greater Birmingham</td>
<td>Birmingham, AL</td>
<td>$150,930,987</td>
<td>$15,423,796</td>
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<td>Health System Aging Board</td>
<td>Birmingham, AL</td>
<td>$28,265,991</td>
<td>$11,280,499</td>
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<td>Pan Am Co. Foundation, The</td>
<td>Cincinnati, OH</td>
<td>$36,818,758</td>
<td>$8,243,478</td>
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<tr>
<td>Carolina Power Foundation, The</td>
<td>Birmingham, AL</td>
<td>$119,128,828</td>
<td>$6,641,267</td>
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<td>Compass Foundation</td>
<td>Birmingham, AL</td>
<td>$1,552,950</td>
<td>$5,596,428</td>
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<tr>
<td>Cullman Foundation of Alabama, The</td>
<td>Birmingham, AL</td>
<td>$129,957,277</td>
<td>$5,463,000</td>
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<tr>
<td>Old Way of Madison County, Inc.</td>
<td>Huntsville, AL</td>
<td>$5,968,062</td>
<td>$4,807,806</td>
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<td>Saffco Foundation, Inc., Jesse A.</td>
<td>Little Rock, AR</td>
<td>$101,094,452</td>
<td>$4,154,000</td>
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<td>T. Boone Pickens Foundation</td>
<td>Grand Rapids, MI</td>
<td>$83,798,547</td>
<td>$4,049,503</td>
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<td>S. Robson Foundation</td>
<td>Grand Rapids, MI</td>
<td>$36,655,510</td>
<td>$3,765,771</td>
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<td>Community Foundation of Alabama, The</td>
<td>Mobile, AL</td>
<td>$51,701,568</td>
<td>$3,704,488</td>
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At A Glance

The Kroger Co. Foundation
1014 Vine St.
Cincinnati, OH 45202-1148
Telephone: (513) 762-4449, ext. 3
Contact: Lynn Marmer, Pres.
Fax: (513) 762-1295
URL: www.thekrogerco.com/community/

Type of Grantmaker
Company-sponsored foundation

Financial Data
(yr. ended 1/31/12)
Assets: $36,818,758
Total giving: $8,243,478

EIN
311192929

990-PF

The IRS has announced processing errors on
electronically filed Forms 990 for filing years 2007
<table>
<thead>
<tr>
<th>Area(s) of interest:</th>
<th>Area(s) of interest:</th>
</tr>
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In AL, AR, AZ, CA, CO, GA, IL, IN, KS, LA, MO, MS, MT, NE, NH, NJ, NM, NY, NC, ND, OH, OK, OR, PA, TX, VA, VT, WI, WV, and WY.
Map of the Foundation Center's Cooperating Collections

Click a point on the map to view details for a cooperating collection.
LOCAL GRANTMAKERS

About Us | Alabama Giving
alabamagiving.org/about
... a national initiative of the Forum of Regional Association of Grantmakers, took its first steps toward increasing philanthropy in our state, ...

Get Started - State and Local Foundation Directories: A Resource List
foundationcenter.org/getstarted/topical/sl_dir.html
Joint project of the Ohio Grantmakers Forum, the Ohio Association of Nonprofit Organizations, and the Foundation Center, ...

Grantmakers Association near Huntsville, Alabama
bing.com

1 Associated Grantmakers of MA · agmconnect.org
   55 Court St · Boston · (617) 426-2606
   Details · Directions

2 Wv Grantmakers Association · bing.com
   29 Garton Piz · Weston · (304) 517-1450
   Details · Directions

See all business listings

Who We Are | Alabama Giving
alabamagiving.org/who-we-are
Alabama Giving is a statewide association of grantmakers dedicated to building and strengthening organized ... Community Foundation of Huntsville/Madison ...
Alabama Giving is a statewide association of grantmakers dedicated to building and strengthening organized philanthropy in Alabama.

Alabama Giving members include:

- **Alabama Civil Justice Foundation**
- **Alabama Law Foundation**
- **Alabama Power Foundation**
- **Black Belt Community Foundation**
- Caring Foundation of Blue Cross Blue Shield of Alabama
- **Central Alabama Community Foundation**
- **Community Foundation of Greater Birmingham**
- Community Foundation of East Alabama, Inc.
- **Community Foundation of Huntsville/Madison County**
- **Community Foundation of Northeast Alabama**
- **Community Foundation of South Alabama**
- **Community Foundation of West Alabama**
- Cox Family Foundation
- **Curtis and Edith Munson Foundation**
- **Daniel Foundation of Alabama**
- **EyeSight Foundation of Alabama**
- Hearin-Chandler Foundation
- **Honda Manufacturing of Alabama**
- **Independent Presbyterian Church Foundation**
- Martha Christine White Foundation, Inc.
- **Mary Reynolds Babcock Foundation, Inc.**
DEVELOPING CORPORATE PARTNERS

- W.I.I.I.F.T.?
- COLLABORATIONS – ARE WE WORKING UNDER THE SAME DEFINITION?
- DON’T UNDERESTIMATE THE POWER OF IN-KIND GIVING:
  - IT TECH SUPPORT
  - BUILDING MAINTENANCE
  - PRINTING
  - GRAPHIC DESIGN
  - VOLUNTEER MANPOWER
DEVELOPING CORPORATE PARTNERS

WHERE DO WE FIND THEM?

• LOCAL SOCIAL ORGANIZATIONS
  • ROTARY INTERNATIONAL
  • KIWANIS
  • THE LINKS
  • FRATERNITIES/SORORITIES
PROFESSIONAL FUNDRAISING ORGANIZATIONS

- Can be of great assistance with both new and established fund raisers
- Should not work on a percentage basis
- Should work on a contractual basis defined by time and a set rate
- Will need to know your organization very well
- Will be your cheerleader in the grant space marketplace
PROFESSIONAL FUNDRAISING CAMPAIGNS

- Before asking for outside $$$, 100% board participation is mandatory
- Can your board tell the story?
- Is your cause compelling?
- What impact will you make in the community with this new funding?
PROFESSIONAL FUNDRAISING CAMPAIGNS

• REMEMBER THE THREE RIGHTS
• ALWAYS DO THE ASK IN PERSON
• DON’T LEAVE A PLEDGE CARD, MAKE AN APPOINTMENT
• MAKE IT AND KEEP IT PERSONAL
• ALWAYS, ALWAYS, ALWAYS FOLLOW UP WITH DONORS
QUESTIONS?

JIM KITCH
812-401-8866
JIM.KITCH@ADI-MOBILEHEALTH.COM