

# What to do if your mission sucks

Association Foundation Group

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# Goals for the session



Who's in the room?  
Why are you here?

# Assumptions, we agree ...

- Mission comes first
- People give to what they care about
- Members have to care about your mission before they'll give
- We're interested in growth – both programmatic and financial

# Greatest wish for your organization ...

Yours

# How did your foundation form?

Discussion

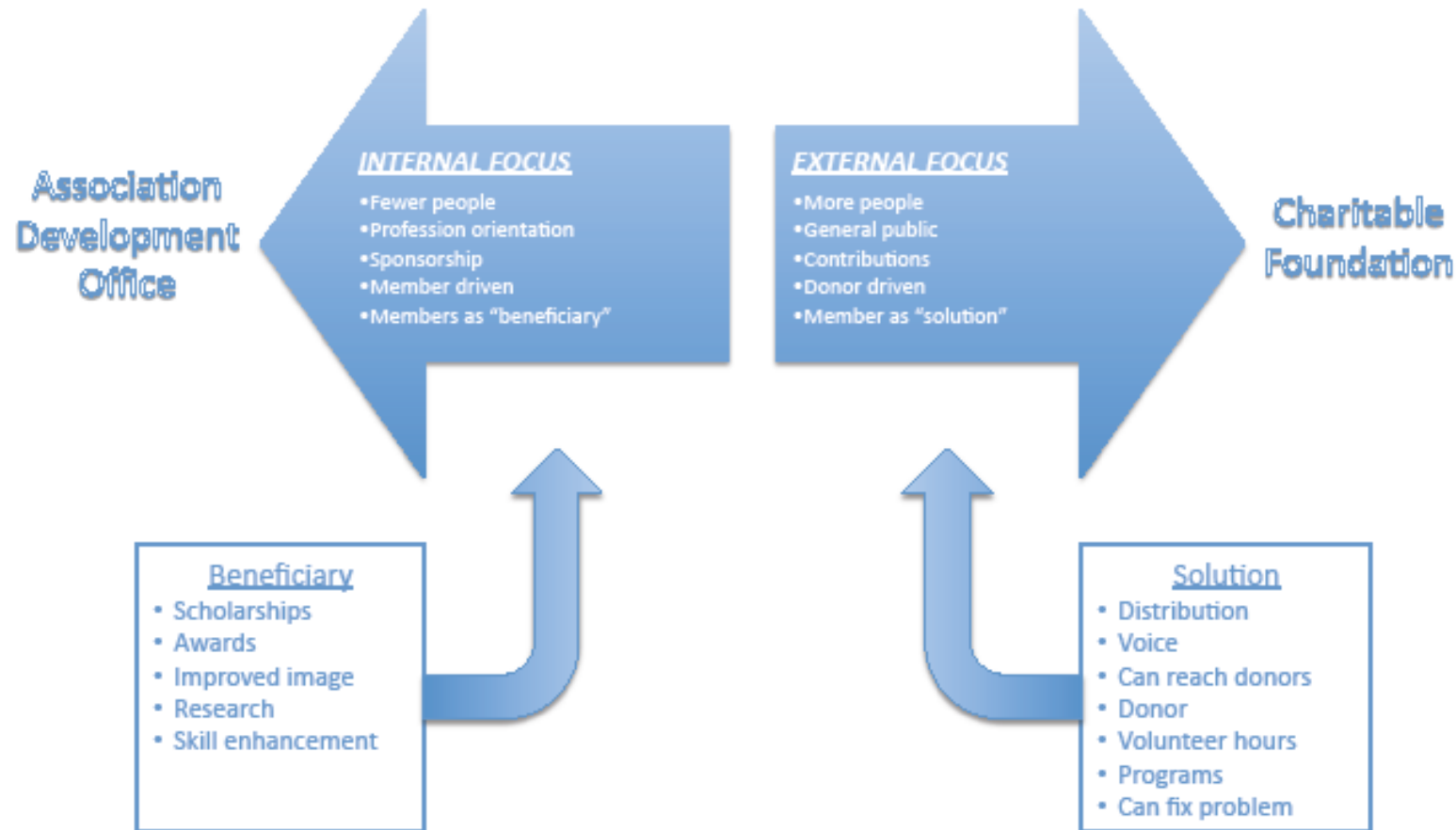
# How most association foundations form

- Supplement association revenue
- Protect windfall from benefactor(s)
- Provide an avenue for “giving back”
- Subsidize association project(s)
- Someone wants to play golf at the annual meeting
- Meet a perceived charitable need

# What we're really discussing ...

Whom do we serve?

# Association Foundation Mission/Program Continuum





# Mission statement fun: Internal or external?

- To enhance math education and financial literacy through the talents and resources of [BUSINESS PROFESSIONALS].
- [FOUNDATION] champions the [BUSINESS DISCIPLINE] profession by encouraging excellence and investing in [BUSINESS DISCIPLINE ACTIVITIES] that benefits society.
- [FOUNDATION] develops resources to advance the science and practice of [SCIENCE DISCIPLINE] to improve [SPECIFIC TYPES OF] health.
- To improve the [HEALTHCARE SPECIALTY] and general health of the public through increasing public and professional knowledge of [DISEASE TYPE] diseases and their therapies, stimulating basic and clinical research to generate new knowledge, and enhancing educational programs at all levels to create opportunities in [HEALTHCARE SPECIALTY] education and practice.
- Through philanthropy, empower current and future [HEALTH SPECIALISTS] to optimize global health.

# More mission statement fun ...

- [FOUNDATION]'s mission is to bring together [MEMBERS] and community to improve our nation's health.
- [PROFESSIONAL TRADE ASSOCIATION] educational foundation provides innovative educational programming to enhance the growth and success of the [PROFESSIONAL TRADE] industry workforce.
- [FOUNDATION] promotes initiatives supporting [SPECIFIC HEALTHCARE SERVICES] for all children.
- [FOUNDATION] provides support for [ASSOCIATION] programs, scholarships, awards and honors. The Foundation champions [THE ASSOCIATION]'s mission to serve diverse global communities by advancing, disseminating and applying [DISCIPLINE] knowledge for improving the quality of life, and communicating the excitement of [DISCIPLINE].



It's about what we help accomplish ...

... not the mission statement words.

# Sweeping general statement: We do four things

- Fundraising
- Marketing
- Operations/admin
- Program

# What's in your program portfolio?

Discussion

# **Do your financial goals fit your program orientation?**

Discussion



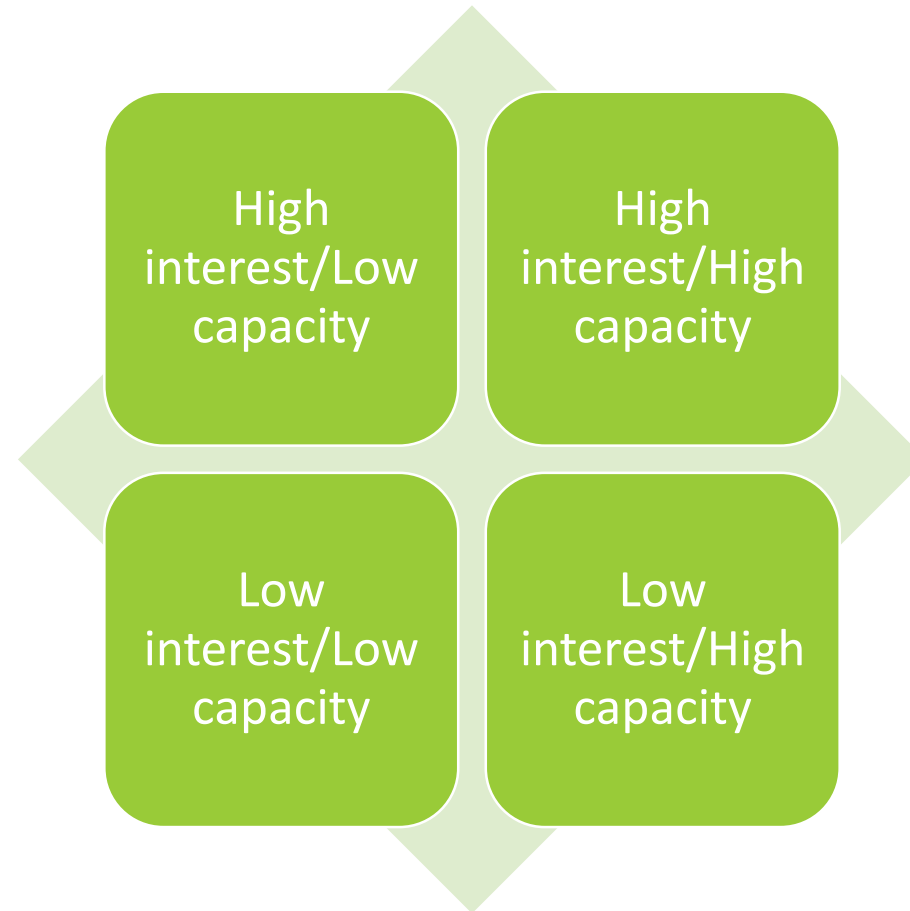
Greatest wish for your organization ...

# Before going to leadership, ask

- Are your fundraising goals based on program objectives or percentage adjustments over previous fiscal years?
- Are there programs languishing in your portfolio while others show promise or even hints of promise?
- Can you identify a path where targeted program investment can drive overall organizational growth? (Even if it means eliminating something else?)
- What does board leadership want?



# Over-simplified prioritization tool



# Example no. 1, circa 2000 to 2006

**It doesn't always work as planned**

## **Characteristics**

- Lived on parent subsidy, loans through 1990s
- Broader leadership structure preferred internal focus programs
- Significant behind-the-scenes influence by founding association leaders
- Efforts to go external hampered by internal obligations
- Fundraising expectations didn't match program offerings
- Hostile foundation-association relationship
- Right initiative/wrong place/wrong time

# Example no. 2, circa 2009 to present

## An encouraging work in progress



## Characteristics

- Broader leadership structure embraces outward focus – putting kids first
- “Fail fast,” focus on what is working
- Built sufficient “war chest” before plateau
- Approaching \$5 million grants-made
- Grant expansion driving increases in contributions (so far)
- Outcomes measures
- “Market research”

# What are you going to do tomorrow?

Discussion

Questions?

# Thank you

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