

# Supporting Fundholders Through a Technology Transition

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February 2025

### **Overview**

In 2022, The Dallas Foundation moved from Blackbaud/Npact RE | FE | GE to Foundant Technology's CSuite.

Fundholders had been very dissatisfied with the user experience of the previous donor portal, so our primary goals were to ensure they felt heard and supported and provide a seamless transition.

### **Communication Plan and Tactics**

- Created a messaging and strategy plan
- Dedicated web page (dallasfoundation.org)
- Training Materials (video tutorial, FAQs)
- Personal support(fund stewards, support@dallasfoundation.org)
- Six week branded e-mail campaign (MailChimp)

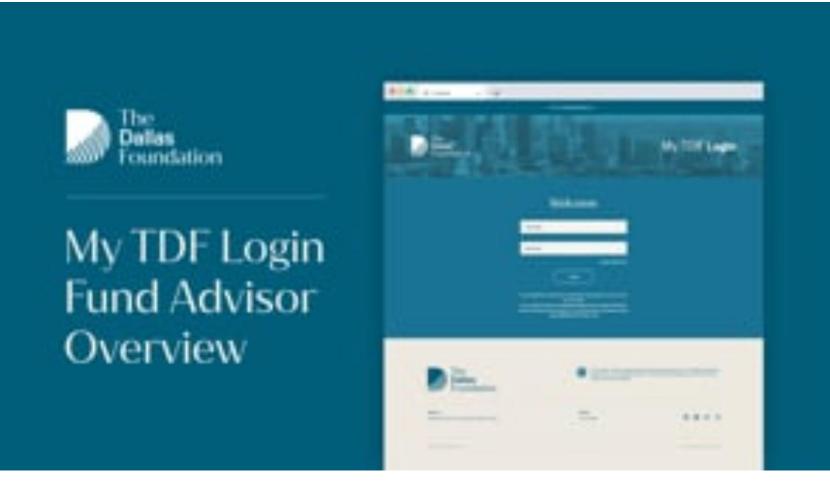
The **Dallas** Foundation

### Key Messages

- Transitioning to the CSuite platform for our donors will be as seamless as possible.
- Donors and fundholders will feel supported throughout the transition.
- Foundation staff are available for assistance throughout this process.
- This intentional integration provides an upgraded design, security, and user experience of our donor portal and the systems that support it.
- Fundholder access is still as simple as visiting dallasfoundation.org and can be accessed via the "My TDF Login" in the super navigation panel.
- Fundholders will be prompted via the CSuite platform to create a new password mid-April.
- Fund statements are now on-demand, self-serve and available 24/7.
- Beginning in April, credit card donations made via the Foundation's website will use a simple and secure giving interface powered by CSuite.
- This new online donation portal requires community fund partners to adjust existing links and/or widgets housed on their independent websites.

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### Resources: Video Tutorial

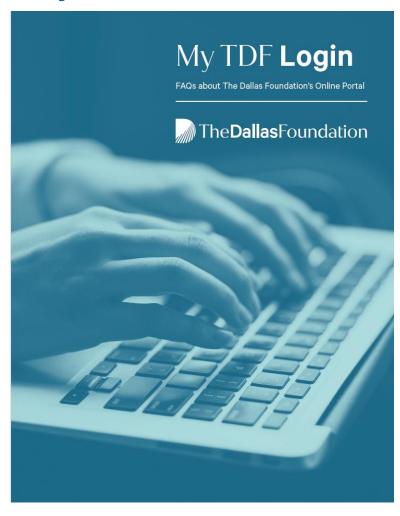


### Objective:

Provide step-by-step visual support for using the portal

### Resources:

### Frequently Asked Questions



### Objective:

Provide written support for using the portal including screen shots and step-by-step instructions.

## Resources: Dedicated Web Page



### Objectives:

- Reinforce messaging
- Provide "getting started" written instructions
- Host video tutorial
- Troubleshoot log-in questions
- Link to Frequently Asked
   Questions (FAQ) document
- Provide access to My TDF Login

### E-mail Campaign: Six weeks prior to launch



### INTRODUCING The Dallas Foundation's New Fundholder Portal

Dear Fund Holders and Fund Advisors,

The Dallas Foundation is pleased to announce a new system we better align with our highest priority: Supporting you on your phil online portal will offer a more efficient and intuitive platform for y management.

We are committed to providing our fundholders with the tools ar make a meaningful impact. It is because of this commitment and have decided to migrate our finance and grants management sy of 2022.

The new portal will have improved functionality that will continue fund balances and view statements, and, if you are an advisor or grants and discover new giving opportunities.

#### What to Expect

The new platform is slated to launch in Mid-April, 2022. Over the transition occurs, you will receive instructions about how to always, our donor services team will be here to help you if you to the control of the co

- All fundholders will have normal functionality through as recommending grants, monitoring fund activity, etc.) th 2022
- Please submit all grant recommendations needing and April 31, 2022 no later than noon on March 31.
- and April 31, 2022 no later than noon on March 31.
   Between April 1 19, the existing donor portal will pr
- (you will be able to view fund information, but won't be ab
   On April 20, you will receive email instructions on how and access the new portal.

f you have received this email in error or are no longer affiliated Foundation, please let us know as soon as possible.

We are excited to introduce you to this upgraded portal experserve as a trusted steward for your philanthropic resources.



### The Dallas Foundation's New Fundholder Portal UPDATE

The Dallas Foundation is excited to debut our **new Fund Porta** Our entire team has been working hard over the last few month upgraded technology platform to improve the overall experience and fund advisors.

#### So, what will change?

As a fund holder or fund advisor, you will be able to easily track recommendation from beginning to end, as well as have direct online database that allows you to gather insights on IRS tax-ev financials, leadership, mission, and more. You will also be able view the fund's grant history.

#### **Grant Recommendations**

- All grant recommendations needing to be processed prio submitted no later than noon on March 31 using the ex
- Between April 1 19, the existing donor portal will provid therefore you will be able to view fund information, but we transactions
- . We will continue to process all contributions as usual dur

#### Technical Support

Our staff has worked diligently to migrate our database and is e and functionality, but we know that any change can be challeng explore the portal, we anticipate that you may still have questio we are here for you. To better serve you and to provide the late developing a quick-reference guide and training resources to st. Login and will send that information closer to the launch date.

If we can be of assistance, please reach out to one of our team

Thank you

The Dallas Foundation's Donor Services Team



The Dallas Foundation's New Fundholder Portal My TDF Login Update



As we approach the debut of our new Fund Portal, My TDF Login, on April 20, our of to make the transition for you, our fundholders and fund advisors, seamless and straightforward. To ensure we can process any grants you would like paid over the four weeks, olease note the following important deadlines:

#### Dates to Know:

- All grant recommendations or invoices needing to be processed prior to April I must be submitted no later than noon this Thursday, March 31 using the exdonor portal.
- Between April 1 19, the existing donor portal will provide read-only access therefore you will be able to view fund information, but won't be able to proces transactions.
- We will continue to process all contributions as usual during this timeframe.

#### What's Next?

We are excited to introduce you to this upgraded portal experience and to continue serve as a trusted steward for your philanthropic resources. Over the next few week before the transition occurs, you will receive instructions about how to use the syste as always, our team will be here to help you if you have questions. To better serve y to provide the latest Information, we are also developing a quick-reference guide an training resources to support your use of My TDF Login and will send that informatio closer to the launch date.

If we can be of assistance, please reach out to one of our team members listed belo

#### Mackenzle Causey Director, Scholarships

Director, Scholarships (214) 694-2509

#### Julie Diaz

Executive Vice President 8 Chief Operating Officer

#### Gary Garcia Vice President, Philanthropic

Vice President, Philanti Partnerships (214) 694-2507

#### Theresa Jones Manager, Donor Services (214) 694-2503

KIm Montez
Director, Gift Planning &
Family Philanthropy

### (214) 694-2525 Kezia Stegemoeller Senior Director, Donor

Engagement (214) 694-2530

Visit the Online Portal



The Dallas Foundation's New Fundholder Portal My TDF Login Update

Dear Fund Holders and Fund Advisors,

As you know, The Dallas Foundation has been working hard to implement our new management and donor portal system – My TDF Login. We are excited to launch Wednesday, April 20 and want to provide an outline of what you can expect over the weeks, including how to login to the new platform.



#### Establishing Your Password

- Dallas Foundation staff will initiate your account by confirming your eligibility an advisor to one or more charitable funds. This eligibility is determined by current information we have on file for your fund.
- If updates are needed, please have an authorized individual reach out to us support@dallasfoundation.org for assistance. You are receiving this email are listed as an active advisor on one or more funds of The Dallas Fou
- You will receive an automated e-mail from sender "no-reply@fCsuite.c not receive it on Wednesday, April 20, please check your spam or junk e-ms will notice "The Dallas Foundation" referenced in the email's subject line. Th email will instruct you on the steps to create a custom password specific to Take note of your usemame and password as you complete this process.
- Please delete this automated email once you have successfully completed.
   The link contained in the email is only to be used once, for establishing you nassword.

#### Accessing the System

To access the portal on or after April 20, simply visit <u>dallasfoundation.org</u> and click TDF Login button in the upper right corner of dallasfoundation.org. This will take y screen of My TDF Login where you will enter your username and password estat step outlined above.

#### Resources

We are preparing a set of resources to help make this transition as seamless as p for a link to these tools in the email on Wednesday, April 20, when the new fund po scheduled to be live. If you have any questions, please contact our donor services advisor contacts, or email us at support@dallasfoundation.org.



#### NOW LIVE! The Dallas Foundation's My TDF Login



Dear Fund Holders and Fund Advisors.

Today's the day! We have launched, My TDF Login, our new online donor portal in which fund holders and fund advisors can monitor fund activity and make grant recommendations.

#### Establishing Your Password

- Today, you will receive an automated e-mail from sender "noreply@fCsuite.com." If you have not received it by 2 p.m., check your spam or junk e-mail folder. You will notice "The Dallas Foundation" referenced in the email's subject line.
- The automated email will instruct you on the steps to create a custom password specific to your fund(s). Take note of your username and password as you complete this moneys.
- Please delete this automated email once you have successfully completed this
  process. The link contained in the email is only to be used once, for establishing
  your infilial password.

#### Accessing the System

To access the new portal, simply visit <u>dallasfoundation.org</u> and click on the My TDF Login button in the upper right corner of dallasfoundation.org. This will take you to the login screen of My TDF Login where you will enter your username and password established in the sten outlined above

If you previously bookmarked our old online giving page on your web browser, you will want to update that link to this new one.

#### Transition Resources

We've created the video tutorial below, a set of Frequently Asked Questions, and additional resources which may be accessed on our Technology Transition Resources webpage. If any part of this upgrade is unclear, or if you are experiencing any technical difficulties, please contact our donor services team, fund advisor contacts, or email us at support@dallasfoundation.org. We are available to walk you through this transition and answer any questions you may have.



The Dallas Foundation

## E-mail Campaign: 2 weeks post launch



### NOW LIVE! The Dallas Foundation's My TDF Login



Dear Fund Holders and Fund Advisors,

Joday marks two weeks since we launched, My TDF Login, our new online donor por where fund holders and fund advisors can monitor fund activity and make grant recommendations. Thank you for being an early adopter by establishing your password and accessing the system! This has been a much anticipated transition of we are pleased with your positive feedback.

#### Tips and Reminders

- The link contained in us automated an application and provided on April 20 is only to
  be used once, for establishing your initial password. Now that you have
  successfully set up your username and password, please delete the automated
  email as it will no longer direct you to the portal.
- To access the new portal going forward, simply visit <u>dallasfoundation.org</u> and click on the My TDF Login button in the upper right corner of dallasfoundation.org. This will take you to the login screen of My TDF Login where you will enter your username and password established in the step outlined above.
- Please note, the username and password you established for My TDF Login in the steps above are case-sensitive. If the portal is not recognizing your username, it may be that your entry is not identical in case to what we have on file. Alternatively, if you are accessing the portal using an iPhone or iPad, you will need to ensure the first letter of your username is not defaulting to a capital letter. Finally, when using the Forgot Password option, it will not recognize your email if the case is not identical to what we have on file. If you experience any issues when resetting your password, please reach out to support@dallasfoundation.org.
- On the Home tab of the portal, you will see the names of all fund advisors for the fund. If this information needs to be updated, please reach out directly to <u>Gary</u> <u>Garcia</u>, who will guide you through the steps for adding or removing individuals from the fund.
- If your fund receives donations via The Dallas Foundation's website, please note
  that we have also launched a new <u>donation portal</u>. Any links that point to our website
  will need to be updated as soon as possible.

#### Don't Forget to Review These Resources

We've created the video tutorial below, a set of Frequently Asked Questions, and additional resources which may be accessed on our <u>Technology Transition Resources webpage</u>. If any part of this upgrade is unclear, or if you are experiencing any technical difficulties, please contact our donor services team, fund advisor contacts, or email us at <u>support@dallasfoundation.org</u>. We are available to assist you and answer any questions you may have.





#### NOW LIVE! The Dallas Foundation's My TDF Login



Dear Fund Holders and Fund Advisors,

Today marks two weeks since we launched, My TDF Login, our new online donor portal, where fund holders and fund advisors can monitor fund activity and make grant secommendations. We've noticed that you have not yet established your password and encourage you to do so within the next two weeks.

#### Log-in Link Expires on May 20

- On April 20, you should have received an automated e-mail from sender "noreply@fCsuite.com." You will notice "The Dallas Foundation" referenced in the email's subject line
- Please use the one-time login link contained in the email to setup your access to My TDF Login, the Dallas Foundation's online portal. This link will expire on May 20.
- The link contained in the email is only to be used once, for establishing your initial password. Please delete the automated email after you have successfully set up your username and password.
- If you did not receive the email, please check your spam or junk e-mail folder or contact us at support@dallasfoundation.org.

#### Once you Establish Your Login

To access the new portal going forward, simply visit <u>dallasfoundation.org</u> and click on the My TDF Login button in the upper right corner of dallasfoundation.org. This will take you to the login screen of My TDF Login where you will enter your username and password established in the step outlined above.

Please note, both the username and password you established for My TDF Login in the steps above are case-sensitive. If the portal is not recognizing your username, it may be that your entry is not identical in case to what we have on file. Alternatively, if you are accessing the portal using an iPhone or iPad, you will need to ensure the first letter of your username is not defaulting to a capital letter. Finally, when using the Forgot Password option, it will not recognize your email if the case is not identical to what we have on file. If you experience any issues when resetting your password, please reach out to supportigidallasfoundation.org.

If your fund receives donations via The Dallas Foundation's website, please note that we have also launched a new <u>donation portal</u>. Any links that point to our website will need to be updated as soon as possible.

#### Questions?

We've created the video tutorial below, a set of <u>Frequently Asked Questions</u>, and additional resources which may be accessed on our <u>Technology Transition Resources webpage</u>. If any part of this upgrade is unclear, or if you are experiencing any technical difficulties, please contact our donor services team, fund advisor contacts, or email us at <u>support@dallasfoundation.org</u>. We are available to assist you and answer any questions you may have.

### E-mail Campaign: 6 weeks post launch &

12 weeks post launch



REMINDER: New Login Required
The Dallas Foundation's
New Fundholder Portal

Dear Fund Advisors.

In April, The Dallas Foundation launched, My TDF Login, where fund holders and fund advisors can monitor fund at recommendations. You have not yet established your p access to the portal when you need it, please create y as possible.

#### **Updated Login Links**

- We have sent you an updated link via an automate reply@fCsuite.com." You will notice "The Dallas Fou email's subject line. Please note that the link contain is no longer valid. Please only use the link in the em
- Please use the one-time login link contained in the <u>TDF Login</u>, the Dallas Foundation's online portal. The expire on June 30.
- The link contained in the email is only to be use initial password. Please delete the automated email up your username and password.
- If you did not receive the email, please check your secondact us at support@dallasfoundation.org.

#### Once you Establish Your Login

To access the new portal going forward, simply visit <u>dallas</u> My TDF Login button in the upper right corner of dallasfor the login screen of My TDF Login where you will enter yo established in the step outlined above.



The Dallas Foundation's New Fundholder Portal



Dear Fund Advisors.

The giving season is fast approaching and our team is ready to support your year-end fund activity. In order for you to recommend grants or track fund balances in a timely manner, you will need to create a new login at My TDF Login, The Dallas Foundation's new online donor portal, where fund holders and fund advisors can monitor fund activity and make grant recommendations. You have not yet established your password. To ensure easy access to the portal when you need it, please create your login credentials as soon as possible.

#### **Updated Login Links**

- We have sent you an updated link via an automated email from sender "no-reply@fCsuite.com." You will notice "The Dallas Foundation" referenced in the email's subject line. Please note that the links contained emails sent prior to today are no longer valid. Please only use the link in the email sent today, August 1.
- Please use the one-time login link contained in today's email to setup your access
  to My TDF Login, The Dallas Foundation's online portal. The link in today's email
  will expire on August 30 and is only to be used once, for establishing your initial
  password. Please delete the automated email after you have successfully set up
  your credentials.
- If you did not receive the automated email, please check your spam or junk e-mail folder or contact us at <a href="mailto:support@dallasfoundation.org">support@dallasfoundation.org</a>.

#### Once you Establish Your Login

To access the new portal going forward, simply visit <u>dallasfoundation.org</u> and click on the **My** TDF Login button in the upper right corner of dallasfoundation.org. This will take you to the login screen of **My** TDF Login where you will enter your username and password established in the step outlined above. Alternatively, you may bypass TDF's website by clicking and bookmarking <u>this link</u>.

### Internal Communication Considerations

- Update all donation and grant letters
- Review/update all fund descriptions (for donation portal)
- Review list of fundholders and access levels to ensure they should have access to the portal
- Develop copy for all CSuite content areas and system generated e-mails
- Configure Stripe auto-responder and thank you page for once donation is made
- Message donors with recurring gifts to re-enter gift on Foundant portal

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### Results

Very high (50%+) open rates on email communications 68% of fundholders have an established a password for My TDF Login Fundholders pleased with donor portal user experience

### **Today**

We are currently deploying an abbreviated communications plan including updated resources to reflect changes that will "go live" on March 31, 2025.

### Questions?

### Communities Foundation of Oklahoma

RACHAEL HUNTER
DIRECTOR OF COMMUNICATIONS

### 30TH ANNIVERSARY REGIONAL EVENTS





- Our WHY behind event hosting
- Held a series of regional events in Durant, Alva, Tahlequah, Weatherford and OKC

### **METHODOLOGY**

- How to ensure buy in from communities
- Regional EventCommittee

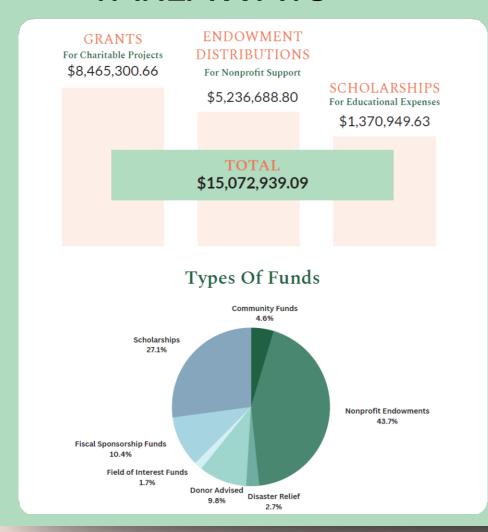


### **LOGISTICS**



- Each event was different
  - Metrics looked different, invites, communications etc.
- •With the exception of OKC, all events were under \$2,500 in expenses. Most far less.

### **TAKEAWAYS**



- We did bring simple marketing materials- past Impact Reports, one pagers etc
- •Wanted to keep the focus on building relationships- who can we connect you to? Who has the same issues your community is facing? IE. Tahlequah example

### CONCLUSION

- 1 Reinforced what we knew- relationships build trust
- Were able to open a number of new funds and expand our reach in those communities



## QUESTIONS?

## SACO FOUNDATION

FOR WACO. FOREVER.

Goal: Deepen Engagement with donor advised fundholders to ultimately increase planned giving donors.

Select donor advised funds

Review agreements

Review giving history

**Fundaversary Cards** 

Personal Letter

Follow-up Meeting

### Thoughby Fundaversary

Dickson Family Fi

\$261 thousand

INVESTED OVER TIME

GRANTED



to date

POTENTIAL LEGACY IMPACT





### **Your Fund's Top Grantees**



**Waco Family Medicine** 



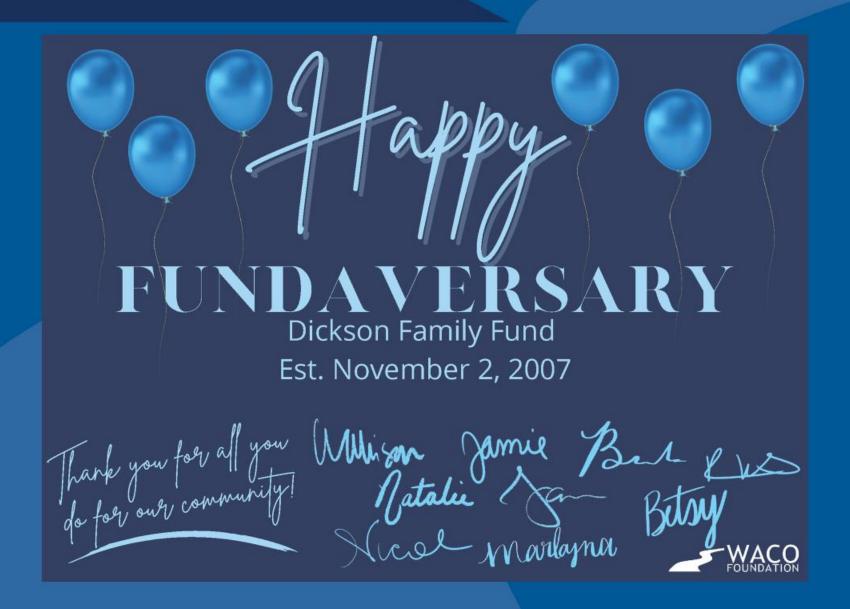
**Waco Foundation** 



Literacy Action, Inc.



Thank you for choosing Waco Foundation as your home for charitable giving!



Dickson Family Fund Est. November 2, 2007 Thank you for all your do for our community! For Waco. Forever.

34% Increase in Donations from Campaign Recipients

25% Conversation rate to Pie Society

A community-wide legacy society managed by Waco Foundation on behalf of the nonprofit community.



Originally an event

Changed to gift

\$4,000/year in budget

Hand-carved Pie Server

Hawkins New York Measuring Cups

Cashmere Throw

Increase in Members? Probably Not.

Increase in Member Engagement? Absolutely.

## Questions?

## Increasing Storytelling to Showcase Impact

Nicole Paquette,

Senior Director of Communications and Public Relations Communities Foundation of Texas



## Internal Efforts: Educate your ambassadors regularly about your work and impact

#### **Internal Communications**

### Expanded CFT internal staff newsletter, CFT Weekly

Weekly e-newsletter now includes:

- Nonprofit Grantee/Partner Spotlights and Event Details
- Fundholder/Partner Spotlights
- Staff and Org-Wide Awards/Accolades

We include direct links to our related social media posts.

Staff can submit their own news/stories via a form with automations through our Asana project management platform.

We've worked to ensure members of our MarCom Dept. serve on internal staff committees to help make further connections to our brand and impact.



Note: We'll be periodically adding short partner spotlights to the CFT Weekly so our entire CFTeam can learn about the inspiring impact we're making together. Below is our first spotlight:

#### Fundholder Spotlight: Vijay Ram and Sureka Gattu

Vijay Ram and Sureka Gattu created the V&S Legacy Fund, a donor-advised fund, at CFT to support their shared passion of education. As they were planning their wedding, they asked their friends and family to contribute to their philanthropy by making a gift to the fund in lieu of wedding gifts.

"We are working to grow our fund into a scholarship fund. This is our way of starting our legacy now, to pass on what we inherited from our parents," said Vijay, who is an alumnus of CFT's Emerging Leaders in Philanthropy program.

Read more about the V&S Success Fund in our annual report, <u>Champions of Community</u>. You can also find CFT's spotlight on this story on Linkedin here.

You can submit partner spatlights at the link at the bottom of this email.

#### CFT featured in Modern Luxury's "Power Players"

CFT leaders Connie O'Neill, Board Chair Elect; Richie Butler, Board Chair; Wayne White, President and CEO; and Calvert Collins-Bratton, Chief Relationships Officer, have been featured in Modern Luxury Dallas' newest "Power Players" Edition!

"CFT's power comes from its ability to bring people, businesses and government institutions together for the greater good of North Texas. Our Board of Trustees and dedicated team of expert staff are our organization's Power Players in expanding our Impact." - Wavne White

Read the full feature here.

#### Fundholder Spotlight: The Childs family and the Live Like Luke Fund

Beth and Derek Childs created the Live Like Luke Fund, a donor-advised fund, at CFT to honor the life of their brave and joyful six-year-old, Luke, who passed away after a year-long battle with leukemia.

Since 2021, over \$150,000 has been distributed from the fund to support critical expenses for families with children undergoing long-term hospital stays. "This is really about giving families more time together," said Derek. "Knowing we can give back in a way that Luke would have been appreciative of, and that our children can be a part of, has helped our grieving process," said Beth.

Read more about the family's inspiring impact in our annual report, Champions of Community. You can also find CFT's spotlight on this story on Linkedin here.

You can submit partner spotlights at the link at the bottom of this email.

#### Fundholder Spotlight: The Orchid Giving Circle & The Village Giving Circle

Champions of Collaboration: Giving circles are a growing global movement where people with shared values come together and give collectively. Giving circles not only provide financial support, but raise awareness and encourage volunteerium.

Two local giving circles, the <u>Orchid Giving Circle</u> and <u>The Village Giving Circle</u>, joined CIT list year. The two organizations have collectively awarded \$5.5 million to 100 onegroffits since their founding, in addition to managing their both-inical platforms and grantmaking efforts, we provide the giving circles access to our local philianthropic expertise to further amount impact.

Read the full story in our annual report here. You can also find this spotlight on our Linkedin

You can submit partner spattights at the link at the bottom of this email.

#### Nonprofit Grantee Spotlight: City Year Dallas

Champions of Bright Futures: City Year Dallas has now been transforming educational outcomes and addressing inequalities locally for the past decade. The organization recruits and trains young leaders from diverse backgrounds to serve full-time in Dallas schools as AmeriCorps members, providing meaningful connections and essential support in literacy, math, attendance, and social-emotional learning.

CFT made an initial investment in City Year Dallas in 2015 with a \$750,000 grant to launch its program in two schools. As the program expanded its reach to six schools, CFT remained a critical partner, providing orgoing support, including a \$500,000 grant to help adapt programming during the COVID-19 pandemic.

City Year's work has been particularly notable in schools identified as Accelerating Campus Excellence (ACE) campuses, including Frederick Douglass Elementary, which was able to improve its rating from a D to a B. Read the full story in our annual report here. You can also find this spotlight on our <u>unloadin</u>.

You can submit partner spotlights at the link at the bottom of this email.

### Internal Efforts: Educate your ambassadors regularly about your work and impact

#### Staff Engagement

#### Mission Moments during monthly all staff meetings

At each staff meeting, we bring in a partner/grantee or uplift an initiative we're funding/leading and let our staff hear directly from them about the impact.

We also recap these on our social media channels, and these posts have performed well in terms of engagement/reach.



Our hearts were warmed by a visit from Dallas Pets Alive! (DPA) and their furry ambassadors. Kami and Lunchbox

Executive Director Leslie Sans shared how DPA is transforming lives through innovative animal rescue programs stating. "Our mission is twofold: reactive rescue, pulling animals out of shelters, and proactive rescue, keeping them in their homes where they belong," With over 31,000 animals and families helped, their impact in North Texas is profound

CFT has supported DPA's innovative efforts with \$110,000 in grant funding since 2017, and we're proud to contribute an additional \$1,000 towards their North Texas Giving Day goal as a thank you for sharing their care with our staff.

Join us in supporting any of the 3,000+ local nonprofits making a difference in our community this Giving Day, September 1-19. Together, we can ensure that organizations like Dallas Pets Alive continue their vital work. Learn more





The future of Texas depends on a strong, educated workforce—and that starts with equitable access to high-quality education.

At our recent CFT All-Staff Meeting, our Educate Texas team shared how we are

- Higher education affordability through policy & partnerships
- Stronger career pathways for students through work-based learning experiences
- Regional collaboration with businesses, higher education institutions, and K-12 schools

By aligning on these priorities. Communities Foundation of Texas is ensuring that every student-regardless of background-has access to the tools they need for postsecondary success and workforce readiness.

Learn more: edtx.org



## Internal Efforts: Actively collect and share impact stories in partnership with colleagues across the foundation

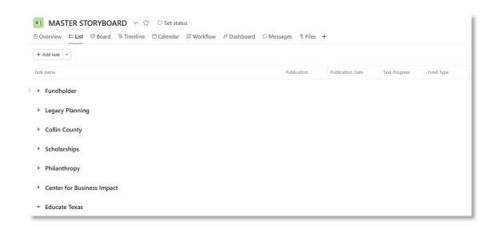
#### **Cross-functional Collaboration**

**Donor/Partner Efforts:** quarterly meetings with Development colleagues to build storyboard, adding and rearranging stories. Stories can be added at any time using an online form via Asana.

**Nonprofit/Grantee Efforts:** monthly meetings with Philanthropy team members to develop grant announcement plans and add or rearrange future impact stories.

All external communications are reviewed internally before sharing drafts with external partners.

Lean on your development and grantmaking partners to learn what to highlight in terms of impact!





## External Efforts: Appeal to local media appetites for good news stories

Fulfill local media outlets need for good news media pitching and event sponsorship opportunities.

**Broadcast:** ramp up broadcast pitching with positive stories of impact highlighting donors and nonprofits, including b-roll video/photos as much as possible

**Print/Digital:** expand media partnerships with hyperlocal outlets with good news storytelling pitches, plus paid and sponsored content. (examples include: *MySweetCharity, DallasDoingGood, Dallasites101*, and other hyper local weekly print papers).

**Event Sponsorships:** sponsor of the *D CEO* Nonprofit and Corporate Citizenship Awards, now in its seventh year. This co-concepted awards program uplifts local leaders, nonprofits, and companies, drawing attention to 100+ finalists/honorees.

#### Next up:

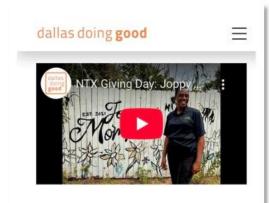
- Regular impact video series spotlighting grantees and their leaders
- Expanding grant announcement plans/events in terms of media/stakeholders



### External Efforts – Examples



*MySweetCharity* shared 40+ articles highlighting nonprofits participating in CFT's North Texas Giving Day. Nonprofit stories were curated by CFT's team.



Joppy Momma's Farm was created to change that. Founded by Kim High on land passed down through her family, the farm embodies a deep connection to the land and a commitment to revitalizing the community through sustainable agriculture. Together with farm director Andrea "NayNay," Kim is working to provide fresh produce and educational resources to promote wellness and self-sufficiency, all while preserving the legacy of Joppa's ancestors.

**Dallas Doing Good** shared about North Texas Giving Day nonprofits through video, social media, and online articles. The above was one of Dallas Doing Good's top-read stories of 2024.

#### NORTH TEXAS GIVING DAY

By Lexy McCarthy

Jubilee Park & Community
Center (Jubilee) is a catalyst for
comprehensive community
revitalization and enrichment
in Southeast Dallas. A placebased organization, the agency
serves the Jubilee Park
neighborhood, a 62-block area
south of I-30 and east of Fair
Park, as well as surrounding zip
codes.



White Rock Lake Weekly ran stories about North Texas Giving Day nonprofits throughout September. Stories were online and front-page inprint, with copies available for free across Dallas.

### Questions?

