

Innovative Marketing Ideas

By Kevin Johnson, CFRE, CSPG

The planned gift market place for 2009 will be like no other time in recent memory. Your marketing must acknowledge, reflect, and respond to these changes in donor expectations and needs if you are to be successful. How will you bring innovation to your marketing work? First, it's important to recognize changes and your opportunities.

Timing will be critical. You already know that events in the lives of donors are the primary driver for planning decisions. This coming year and that following may represent that perfect storm driving gift planning decisions.

“The golden age of bequests” was predicated on an analysis based on demographics – numbers of people reaching advanced ages in unprecedented numbers. In this case, the changing needs and psychological stages of age were the “event” drivers. But age is only one factor in completing the act of including a nonprofit in an estate plan.

In 2009, estate tax laws will change again. In addition, it is quite likely the estate tax will be made permanent. Regardless of precise legislative outcomes, some type of legislative change is quite predictable. This dynamic of change will prompt increased personal estate tax planning. Professional advisors will remind their clients, adding a greater

degree of urgency to revisiting planning for many of your donors.

In the last 18 months, many people have experienced dramatic changes in their economic situation. This visceral shock has prompted many to re-evaluate their long-range plans for themselves, family, and philanthropy. Legal and economic factors, combined with the sunset ages of the greatest generation, mean that the next year in planned gift marketing may be critical to set a pattern of bequest expectations for some years to come. Are you ready?

But there is still more to take into account as you create a marketing plan for 2009 and consider what innovative ideas you can put to work on your behalf.

Political fundraising rules were shattered in 2008. Expectations of donors at all levels were transformed as well. The level of involvement and communication with donors was exceptional and, in some cases, stunning. A new standard of donor care and expectations is emerging among donors. These shifts and donor experiences will affect your work in 2009.

How will your organization meet these growing and evolving expectations of donors? Will the same tools you have been using be up to the task in 2009 and 2010?

There are many different marketing techniques and processes: they are like tools in a toolbox. No tool is right for every job. Having personally used a pair of pliers as a hammer, I know I can get a job done but not if neatness or safety of my fingers is my objective. Some tools can do multiple tasks but with inconsistent results.

Likewise, there are a number of techniques, brochures, or letters that can be applied, borrowed, or reconfigured to build your pipeline of future planned gifts. Which will work best for your donors and larger constituency? Which might be a waste of your efforts?

Here are a number of different approaches that groups of different sizes used with success – and in some cases truly spectacular success -- in 2008:

- Matching gifts: A donor makes a cash gift to current operations or to an endowment for every new documented bequest.
- Asking for advice: Involve bequest donors and prospective donors in helping define or update the organization's strategic vision.
- Publicize your business plan: Describe in detail how your business plan to accomplish your mission matches up and links with your plan for revenue. Show how bequests will be or could be used for maximum impact.
- Due diligence: Create a due diligence package for advisors that answers vital

questions about where the money goes, mission, and impact.

- Use the power of wedge issue examples: For example, in one case the board members of a 1 year old organization announced they had each included the group in their estate plans. Such an act surprised people who thought that only groups of decades and more of history would ever be considered for a bequest gift. It surprised people and forced many to re-examine their views about the work and value of the group. It also contributed to a donor making a bequest decision and a year later deciding to give the \$1 million bequest early so she could see it put to work. s. Such actions speak loudly and powerfully and can drive a wedge into old stereotypes and can directly translate into gifts.

Assign program staff to make thank you calls for small and routine gifts to planned gift prospects. You will be pleasantly surprised by the results. Program staff often report they are surprised to have so much positive conversation with people who really like what they do.

Ask donors to get involved at new levels, in targeted, defined, and substantive activities with program staff (no envelope stuffing please). One of the best ways to build true loyalty is to expand the number and nature of relationships donors have with people – real people – within the organization.

The planned gift landscape has changed. Competition for donor focus and attention will be greater than ever before. Your challenge will be to meet and exceed donor expectations this year. The best way to be innovative is to discover what

your donors uniquely need from you and your mission and to deliver.

Reprinted from the Planned Giving Mentor™
Copyright © 2009. Retriever Development Counsel, LLC
Reproduced by permission.

About the author: **Kevin Johnson** has more than 27 years experience working with public service organizations, political campaigns, and start up ventures. He has helped nonprofit groups secure or complete more than 500 legacy and major gifts valued at more than \$68 million. In the role of a consultant and principle of Retriever Development Counsel, LLC in the last 11 years he has helped start or expand more than 80 major and legacy gifts programs.

In the role as senior associate with Training Resources for the Environmental Community, he has delivered numerous web-based training sessions and provided extensive one on one coaching on legacy gifts for conservation groups throughout western North America. Kevin is a member of the Planned Giving Mentor national advisory board, and is a regularly invited speaker at regional and national fundraising and planned giving conferences. He is past president of the Northwest Planned Giving Roundtable and member of the Portland Estate Planning Council.

In a 2008 workshop presented at a national conference, the editor of a national Canadian publication described his presentation on measuring success and linking outcomes to strategic fundraising objectives and fundraising as “the best he had heard on the topic in his 17 years as an editor.”

Contact information: Kevin@RetrieverDevelopment.com; 503 736 1102