



# Outreach Activities

Marketing, Education & Wealth Transfer




**Iowa Council of Foundations**

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[www.IowaCouncilofFoundations.org](http://www.IowaCouncilofFoundations.org)  
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**Iowa community foundations**



**Ida County COMMUNITY BETTERMENT FOUNDATION**

Rita Frahm,  
 Chair- Ida County Community Betterment Foundation

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# what

is the importance of marketing?

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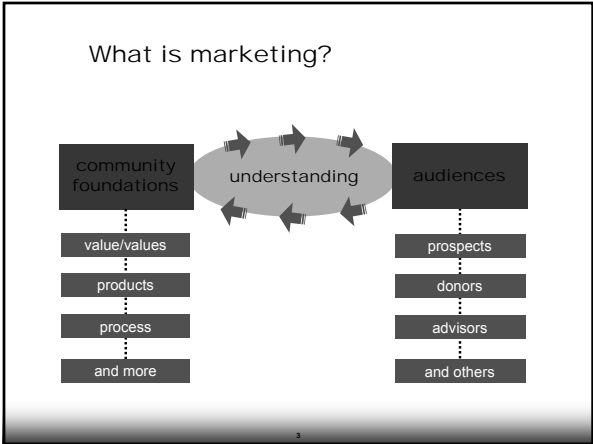
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Community foundations...

There has never been a *greater need...*  
or a *greater opportunity* to unleash resources.

- Local, accessible organizations
- Permanent, flexible institutions
- Credible, capable conveners

Community Foundations are key organizations  
in expanding philanthropy.

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Why marketing?

*"Everything we do is marketing...  
Everybody here is in marketing."*

participate in meetings     *talk to donors*  
deal with advisors     *answer phone*  
make grants     **manage investors**

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Marketing can help...

**Create** awareness  
**Enhance** perceptions  
**Reinforce** decisions

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## Creating a Messaging Platform

- Our mission is...
- We describe a community foundation as...
- We are known for... (three distinct features)
- Five "fast facts"
- The two stories we tell are...
- Our positioning statement

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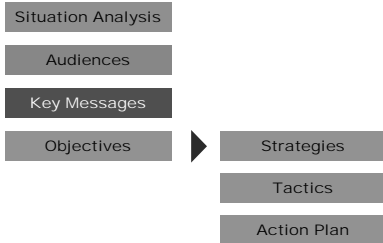
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## Marketing planning



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## Four P's of Marketing *for Community foundations*



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Four P's of Marketing  
*for Community foundations*

Public Awareness

Creating awareness and buzz

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Four P's of Marketing  
*for Community foundations*

Professional Advisors

Single greatest point of leverage

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Four P's of Marketing  
*for Community foundations*

Personal Connections

Trustees and donors, current and past, as "ambassadors"

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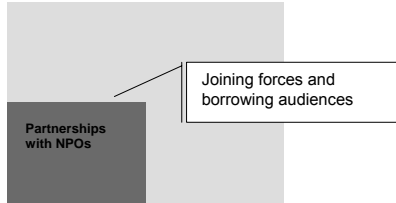
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## Four P's of Marketing *for Community foundations*



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## Connecting with Professional Advisors

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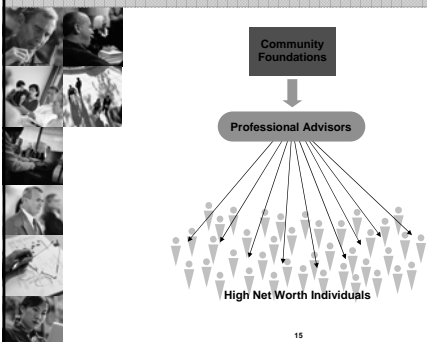
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## An Important Donor Channel



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## Understanding Professional Advisors

<b>Attorney (estate)</b>	Estate and tax planning, wills, trusts, financial planning, consultations
<b>Attorney (general)</b>	Business and family legal consultation, estate and tax planning, wills, real estate transactions, business sales
<b>Accountant</b>	Tax planning and returns, business consultation, financial planning
<b>Banker/Trustee</b>	Banking and investment services, long-term trust administration, private banking
<b>Life Insurance Agent</b>	Life insurance, financial planning, evolving lifetime products
<b>Financial Planner</b>	Financial planning, retirement income planning
<b>Broker</b>	Investment services, portfolio management, financial consultation

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## What We Can Offer Advisors

### *Benefits of community foundations*

- We partner with professional advisors to create highly effective approaches to charitable giving
- We work through you
- We help you build stronger client relationships
- We connect families through the generations

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## How to Identify Advisors

### *Connecting with Professional Advisors*

- Advisors making current referrals
- Connections to Board Members
- Referrals from donors
- Influencers and Community Networks
- Advisor networks and organizations



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## Handling Referrals

*Advisors want to manage their client relationships*

- Ask the advisor how s/he would like to work with you
- Offer to support the advisor in any way—in front of the client or behind the scenes
- Explain process to the advisor
- Keep the advisor informed
- Thank the advisor for referrals



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## 3 Steps for 3 Months- PAs

**1**  
*Advisor Group*



**5**  
*One-on-one Meetings*



**25**  
*Mailings*



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## Putting it into Practice

Ida County  
COMMUNITY BETTERMENT FOUNDATION  
An affiliate of the Swedish Community Foundation

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# Connecting Donors with the Transfer of Wealth

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## Giving Values

Motivations for giving	Obstacles to giving
<ul style="list-style-type: none"><li>• Feel strongly about a cause</li><li>• Personal experience with an organization</li><li>• Tax benefits</li><li>• Response to a request</li><li>• Moral imperative</li><li>• Religion or spirituality</li><li>• Involvement of friends and family</li></ul>	<ul style="list-style-type: none"><li>• Not confident that donations will be used in a productive and valuable way</li><li>• Have not found a compelling reason to give</li><li>• Have a lack of time to research and consider giving</li><li>• Are uncertain about own future financial situation</li></ul>

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## Preferences

<ul style="list-style-type: none"><li>• Family involvement valued</li><li>• Psychological factors can determine feeling of financial security</li><li>• Demand for customization and personalized service</li><li>• Use of professional advisors</li><li>• Support of multiple charitable interests</li><li>• Acceptance of risk</li><li>• Frequent and fluent use of technology</li><li>• Increased awareness of giving options</li></ul>
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## Targeting Donors- Examples Messages



- Involve your family in philanthropy
- Giving back may strengthen your family values
- Your family can stay involved in your gift
- Families like yours have given
- You can address local needs
- You can leverage your gift with gifts from others

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## Iowa Wealth Transfer Study



*PowerPoints for County Presentations*

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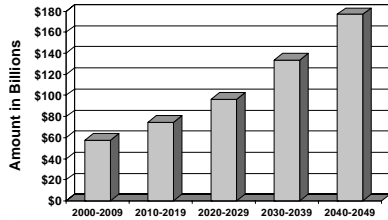
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## Iowa's Wealth Transfer Projection

\$531 billion in 50 years



vision



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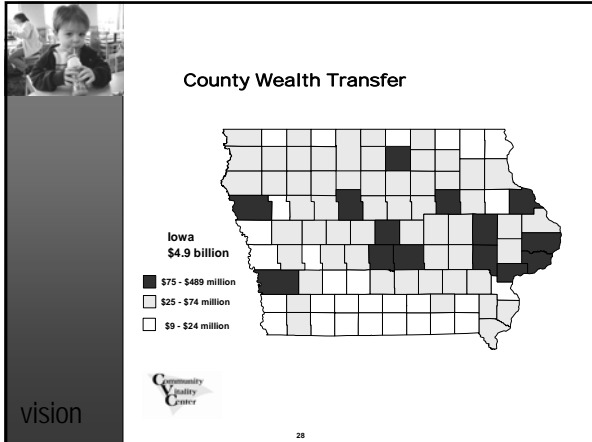
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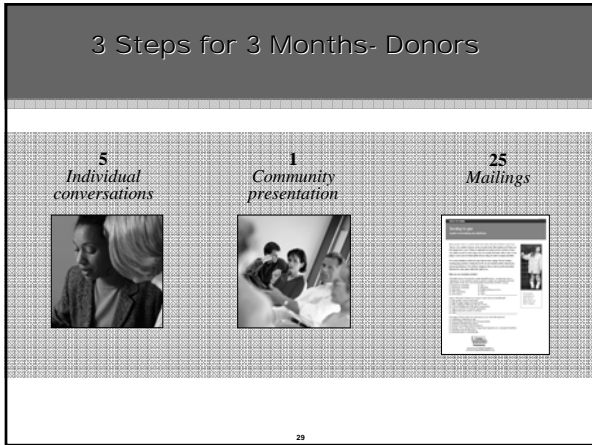
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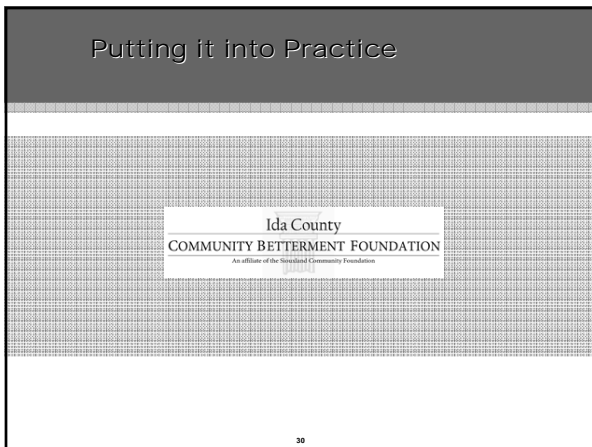
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# Working with Community Organizations

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## What Organizations May Be Interested?

- Social service agencies
- Arts and cultural organizations
- Healthcare and hospitals
- K-12 schools—public and private
- Colleges and universities
- Religious organizations
- Libraries and municipalities
- Many more



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## Our Distinct Benefit

Personalized service	→	Customized giving approaches Personal legacies
Local expertise	→	Strategic grants Making a difference
Community leadership	→	Convener, partner and catalyst Permanent community capital

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## Our Expertise

- Planned giving expertise
- Complex gifts: stock, real estate, etc.
- Investment policies and performance
- IRS public support test
- National standards
- Professional advisor relationships
- Donor legacy through named funds



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## Calm Competitive Concerns



*We partner with community organizations to build funds*

- Designated to benefit the organization
- Supplements their development capacity with planned giving expertise
- About building long-term endowment; not annual appeal
- Board members may be first to add mention in estate plans

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## 3 Steps for 3 Months- Community Organizations

**100**  
Mailing



**1+**  
NPO board  
presentation



**1**  
Promotional  
Feature



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Putting it into Practice

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Ida County  
**COMMUNITY BETTERMENT FOUNDATION**  
An affiliate of the Statewide Community Foundation

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Putting it into Practice

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Questions,  
 Comments,  
 Examples

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For more  
 Information contact...



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**Iowa**  
 community foundations  
For good. For Iowa. For ever.

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