Marketing and Stewardship: Simple Strategies to be More Effective

February 18, 2021
Agenda

- Marketing and Stewardship go hand in hand
- Marketing Strategies
- Importance of Stewardship
- Examples
- Breakout Rooms- Pay attention to win!
Marketing and Stewardship
Stewardship + Marketing

Handwritten thank you note
Thank you call
Birthday/holiday card (with personal note)
Special event
Special tours
Small, meaningful gifts

Donor event with special recognition of legacy society. Invite prospects!
On-site donor recognition
“Ask Me About My Legacy” ribbons attached to nametags
Dedicated newsletter sections
Testimonials (print and video)
Highlight legacy society at events
Donor Listings

Legacy pin
Tagline in email signature / on business cards
Website
Flyers
Brochure
Social media
Letter/email to supporters
One-pagers
Rack card
Bookmark
Blog post
E-newsletters
Weekly communication
Presentations
Message on envelope of mailing

Weekly communication
Tagline in email signature / on business cards
Website
Flyers
Brochure
Social media
Letter/email to supporters
One-pagers
Rack card
Bookmark
Blog post
E-newsletters
Weekly communication
Presentations
Message on envelope of mailing

 Monthly communication
Tagline in email signature / on business cards
Website
Flyers
Brochure
Social media
Letter/email to supporters
One-pagers
Rack card
Bookmark
Blog post
E-newsletters
Weekly communication
Presentations
Message on envelope of mailing
Marketing

Endowment Fund

Legacy Society

Planned Giving
DOROTHA HOGUE ENDOWMENT FUND

Established in 2017 to celebrate our 125th Anniversary, the Dorothea Hogue Endowment Fund proudly honors Dorothea Hogue, who pioneered the current Florence Crittenton Services program model and was the first Denver Public School teacher at Florence Crittenton. In 1984, she worked with Debbie Gilboy Corley, a social worker, to transition the organization from a residential home for unwed, pregnant women to our current model – a public-private partnership between Denver Public Schools and Florence Crittenton Services that provides education and comprehensive wrap-around support services to teen mothers and their children. This endowment not only respects our history and commitment to serving young women and their children, but also will provide the financial security to ensure we continue to support teen mothers and their children for generations to come.

FLORENCE CRITTENTON SERVICES 125 LEGACY CIRCLE

All who make a current or planned gift to the Dorothea Hogue Endowment Fund will become a member of the Florence Crittenton Services 125 Legacy Circle. Founded during our 125th year of service in Denver (1893-2018), the Legacy Circle honors those that have made Florence Crittenton Services the organization it is today and those that have committed to its future.
Marketing: Strategies

Inside the Mind of the Bequest Donor

Russell James, J.D., Ph.D., CFP. Texas Tech University
Marketing: Personal Connection

Life Narrative
Marketing: Personal Connection

Never Interested

Interested Now

14% 12%
Make a bequest

7%
Make a gift

30%

6%
Support causes important in your life

2014 & 2015 Surveys, 1,822 Respondents
Marketing: Social Connections

Honor a friend or family member

Russell James, J.D., Ph.D., CFP. Texas Tech University
To “honor a friend or family member by making a memorial gift to charity in my last will & testament”
Marketing: Connect through stories

40 for 40

Living Donor Stories
Marketing: Stories

THE VILLAGER

BUILDING A FAMILY LEGACY
A CONVERSATION WITH THERESA KOLLATH

When and how did you learn about Warren Village?

My Mom, Melody Kollath, became involved with Warren Village in the mid-1980s. I honestly don’t recall how she got involved, but she was always on the watch for community outreach opportunities, and ways that she could use her financial knowledge and skills for the benefit of others.

I remember how excited my Mom was to be such an active participant, and how proud she was to be selected as the Board President in the early 1990s.

Why have you chosen to include Warren Village in your estate plans?

Not only is this an excellent way to further my Mom’s legacy (and to remember her by), but it’s a meaningful and measurable way for me to help my local community become a better place. I contribute to national and international charities as well, but we should all remember that we also need to focus on organizations close to home.

What does it mean to you and your family to support our mission?

By example, our Mom taught us to be very community focused, and all of us continue this in various ways.

Support for Warren Village is another facet of this, and one so deserving of support. Stability, safety, and the right amount of help and knowledge at the right time can have an enormous positive impact — and that’s what Warren Village helps to provide.

The generations of Kollath family members have now been involved with Warren Village activities!
Marketing: Social Norms

**Generic:**

Would you like to make a gift to charity in your will?

**Social Norm:**

*Many people* like to leave a gift to charity in their will. Are there any causes that you would like to support in this way?
Marketing: Social Norms

- Never Interested
- Interested Now

<table>
<thead>
<tr>
<th>Action</th>
<th>Never Interested</th>
<th>Interested Now</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make a bequest</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>Make a gift</td>
<td>12%</td>
<td>23%</td>
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<tr>
<td>Social norm</td>
<td>9%</td>
<td>31%</td>
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</table>

2014 Survey, 2,369 Respondents, Groups D/E/LateG+H
Marketing: Social Norms

- No Norm: 42%
- Global Norm: 60%
- Local Norm: 80%

Marketing: Show Benefits

You can make a gift of stocks or bonds

You can avoid capital gains taxes by making a gift of stocks or bonds

Never Interested: 20%
Interested Now: 31%
Marketing: Use Simple Language

Make a lasting impact on _______ with a gift in your will, trust, or retirement funds.

Tagline
Marketing: Make it Relatable

"We stand on the shoulders of those who came before us, and Devorah and I are blessed to honor the Jewish sages’ wisdom by paying it forward. Life & Legacy allows us to do just that for the Jewish organizations – like Kavod – that we cherish."

—Daniel (and Devorah) Bennett

"I am a Legacy Society member because providing housing for seniors in the long term is an impact I want to make, even after my death. Keeping a roof over someone’s head is the greatest legacy a person can leave."

—Molly Zwerdlinger

"My grandparents were instrumental in creating the institutions to support Jewish life in Colorado. It’s up to me to make sure those agencies have the resources they need to care for our community for many more generations."

—Jamie Sarche

If you’d like to speak with any of these individuals about their Legacy membership, I know they would love to talk with you about why they joined and what kind of specific plans they have in place. I am very proud of the Legacy Society and am honored to be part of it; I believe you will be, too. The future is in our hands, and we can all make a difference.

“A legacy commitment to Kavod is an easy and efficient way to support Kavod, and all the terrific work it is doing. I quickly learned that completing the form took almost no time and gifts of any level are greatly appreciated. My wife and I were happy to be a part of the community supporting Kavod and being Legacy Society members.”

—Steven (and Loraine) Summer

Testimonial Library

Kavod Senior Life
Marketing Takeaways

- Foster connections through stories
- Show giving as a social norm
- Demonstrate a tangible benefit
- Use simple language
Stewardship
Stewardship: Timing

Destabilizing Events

Death feels near

Family structure changes
Stewardship: Timing

Stay Present
Stewardship: Timing

Larger Gifts
A Good Reminder

$4,210 average annual giving pre-plan

+$3,171 average annual giving increase

$7,381 average annual giving post-plan

Annual Giving Increases
Stewardship Examples

Hi, Amelia, Jewish Family Service made this video just for you, our loved Legacy Society members!

WATCH YOUR VIDEO!

Valentine for Amelia
Marketing + Stewardship

Our legacy society is growing!

Thank you to our newest legacy donors:

Amelia and Andrew Fink
Judy Altenberg and Bruce Plotkin
Sarah Indyk and Charlie Miller

Join them in making a lasting impact on our community through a gift in your will, trust, retirement fund, or life insurance policy.
Thank you for offering this unique opportunity to visit the Rembrandt exhibit at the Denver Art Museum and hear from the perspective and expertise of the curator. It was a delightful and educational opportunity and I am honored to be a member of this group!
- Bonnie Merenstein (Denver JDS grandparent, Legacy Society member, and Chai Five Club member)
Stewardship: Virtual Events

NEW Virtual Coffee Chats with Jonathan
FOR CHAI SOCIETY AND CAROB LEGACY CIRCLE MEMBERS

Tuesday, February 16, 2021
9 - 10 am

Executive Director Jonathan Lev will host regular chats so we can virtually gather, share updates, and answer questions about the J.

Jonathan will be joined by Senior Director of Programs Nancy Lipsey for our February Coffee Chat.

Register to join us.

Please contact Jessica Bornstein at 720-749-2514 or jessica.bornstein@boulderjcc.org if you have any questions.

What are the Chai Society and Carob Legacy Circle?
Chai Society members make a financial investment in the Boulder JCC by donating $1,800 or more annually. Carob Legacy Circle members have made a legacy commitment to the Boulder JCC. Thank you for your generous support of the Boulder JCC as a Chai Society and/or Carob Legacy Circle member.
My Story, My Legacy

MY STORY, MY LEGACY
The path I have taken & the legacy I will leave

A guided legacy journal from Rose Community Foundation
WHAT WILL YOUR LEGACY BE?

What if it could inspire a student to become a leader, change the life course of a young adult, open a world of discovery, connect families to their roots and honor your most valued traditions?

What a rich legacy that would be.

It was very meaningful to include Denver Jewish Day School as part of our estate planning. Having a strong day school presence in a city like Denver is critical and we wanted to be a part of the long-term sustainability of the school.

— Michele & Jordan Schorg
Takeaways – Keep it Simple
Stewardship + Marketing

Handwritten thank you note
- Thank you call
- Birthday/holiday card (with personal note)
- Special event
- Special tours
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Donor Listings
- Testimonials (print and video)
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- Bookmark
- Blog post

E-newsletters
- Weekly communication
- Presentations
- Message on envelope of mailing

Rack card
- Social media
- Bookmark

Blog post
- E-newsletters
- Weekly communication
- Presentations
- Message on envelope of mailing
Integrated Development Plan

- Case Statement
- Management Plan
- Prospect List
- Marketing Plan
- Recognition and Stewardship
- Goals and Implementation

Draft before your individual coaching session
# Implementation Checklist

<table>
<thead>
<tr>
<th>Task</th>
<th>Date</th>
<th>Cultivation/Legacy Conversations</th>
<th>Marketing</th>
<th>Stewardship</th>
<th>Team member responsible</th>
<th>Completed</th>
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</thead>
<tbody>
<tr>
<td>Present at board meeting</td>
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<td>X</td>
<td></td>
<td></td>
<td>ED and development director</td>
<td>1/9</td>
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<tr>
<td>Have 2 legacy conversations</td>
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<td>X</td>
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<td></td>
<td>ED and board chair</td>
<td>1/8, 1/27</td>
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<td>Ask Donor 1 to do a testimonial for Feb newsletter</td>
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<td></td>
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<td>board chair</td>
<td>1/22</td>
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<tr>
<td>Announce legacy society in monthly enewsletter</td>
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<td>development director</td>
<td>1/12</td>
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<tr>
<td>Calls/thank you notes</td>
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<td>X</td>
<td></td>
<td></td>
<td>board chair, development director</td>
<td>ongoing</td>
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**February**

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<tbody>
<tr>
<td>Publish Donor 1 testimonial in newsletter</td>
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<td>X</td>
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<td>development director</td>
<td>2/9</td>
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<tr>
<td>Facebook post with Donor 1 testimonial</td>
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<td>X</td>
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<td>development associate</td>
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</tr>
<tr>
<td>Prepare legacy society ad for March newsletter</td>
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<td></td>
<td></td>
<td></td>
<td>development associate</td>
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<tr>
<td>Have 3 legacy conversations</td>
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<td>X</td>
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Questions
Thank you!

Amelia Fink
Director of Nonprofit Funds and Endowments
Rose Community Foundation
afink@rcfdenver.org
303.398.7452