|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **GOAL** | **OBJECTIVES** | **AUDIENCE** | **MESSAGES** | **TACTICS** | **TIMING** |
| Build awareness among my constituency that there are opportunities for legacy gifts to my organization. | *Examples:*  \_\_\_\_ Legacy inquiries this year  \_\_\_\_ Legacy conversations this year  \_\_\_\_ Legacy commitments this year |  | How can you build on HCF’s legacy messages?   * Leave a legacy. * The kids first, then who? * Introspection. Look at the entirety of your life. * Forward your love. * Give beyond your years. | *What are ways to educate and cultivate? How can you build on what you already do to reach your audience? What can you do that’s new?* |  |

**Before you begin the marketing plan:**

1. Build internal case for support with your leadership – E.D. and board
   1. Mission
   2. Case for Support – Internal, comprehensive, planned giving specific
      1. What do you do and why is it important to your community?
      2. Examples/stories about your organization’s mission and its effectiveness?
      3. Are you well managed? Can you assure donors of your organization’s longevity? Are you building your capacity to sustainably deliver on your mission? How?
      4. Why are you seeking legacy gifts? What will they do for your organization and meeting its mission?
      5. Do you already have examples/stories of the impact of legacy gifts on your organization?
   3. Endorsement from organizations’ leaders
2. Prepare to start your program – as simple or complex as appropriate for your situation
   1. Testamentary language
   2. Gift acceptance policy
   3. A professional advisor who has volunteered their expertise to advise and answer questions when you need guidance.
3. Set expectations
   1. What is your budget?
   2. How much time can you or your staff devote to planned giving marketing each week or month?

**To develop your marketing plan:**

1. What is your goal?
2. What is/are your objective(s)?
3. Who is your audience? Identify prospects – start with those closest to your organization
   1. Consistent annual fund donors
   2. Long-time members,
   3. Board members
   4. Volunteers
   5. Others with well-established bonds to the organization
   6. Propensity to give
      1. Age
      2. Giving history, relationship with the organization
      3. Financial independence or absence of children
      4. Education level
      5. Social Capital – the more an individual is engaged within the community and more points of contact between your organization and the prospect, the better
4. Tactics
   1. Educate – familiarize donor base and prospects with legacy giving to prepare prospects for face-to-face meetings and reach those whom you may not have identified but are still interested
      1. Existing media
         1. Newsletters
         2. Web site
         3. E-publications
         4. Annual report
         5. Social media?
         6. Special events
      2. Additional media
         1. Informational brochure as a receipt mailer
         2. Host tax and estate planning seminar
         3. Other?
   2. Cultivate – to build trust, to listen to the donor and his/her interests and needs
      1. Face-to-face meetings
      2. Tours of organization or program visit
      3. Meeting with program staff
      4. Other events
5. Start the conversation – marketing helps lead you to this point
6. Steward - Come back for the September 20 Legacy Campaign Lunch

**HCF Resources Available to You:**

<https://www.hawaiicommunityfoundation.org/plannedgiving>

Graphic/Article Resources

* Square image for web or high-resolution – yellow/green quilt or hula dancer
* Banner image for web – yellow/green quilt or hula dancer
* Advertisements in PDF - – yellow/green quilt, mother/child, owl, hula dancer - can be customized by HCF with your logo and sized for different publications with advance notice
* Handout in PDF – 2-sided listing all organizations participating on back of advertisement fronts. 8 ½ by 11.
* Language about the Legacy Giving Campaign for newsletter articles.
* HCF Logo – please email Beth Kuch ([bkuch@hcf-hawaii.org](mailto:bkuch@hcf-hawaii.org)) if you are interested in using the HCF logo in any of your materials.

Planned Giving Toolkit with Templates

* Legacy Giving one sheet
* Legacy Society Invite Letter
* Legacy Society Charter Member Letter
* Letter for Current Donors
* Gift Confirmation Letter
* Sample legacy language

**Recommended reading:**

*Donor-Centered Planned Gift Marketing* by Michael J. Rosen, CFRE:<https://www.amazon.com/Donor-Centered-Planned-Gift-Marketing-Development/dp/0470581581/>