

DONOR-FRIENDLY ENDOWMENT MARKETING

Northeast Regional Endowment Conference
Salem, MA

11 April 2015



Rev. Cheri Lovell
Director, Marketing & Strategic Initiatives

Why do you want to grow your endowment?



- Why do your donors give?
- What's your goal for your initiative?
- What's the story you're going to tell to inspire giving?
- REMEMBER —

It's all about the donor!

WHO is your audience?

- Significant givers
- Regular givers
- Older people
- People who values your programs
- Regular attenders
- Generation Z
They may be kids now, but they like to raise money for their causes!



WHAT types of gifts are you looking for?



- Outright gifts — cash, stock, etc
- Bequests (gifts in wills)
- Life insurance
- Retirement assets
- Charitable gift annuities
- And other planned gifts

WHEN will you be ready to launch a focused initiative?

IS YOUR INFRASTRUCTURE IN PLACE?

- **Gift Acceptance Policy**
 - What kind of gifts will you accept?
 - Percentage for operations?
 - Minimum for named funds
 - How you'll handle surprises

- **Spending/Endowment Policy**
 - How will returns be allocated?
 - Do you have soft designations?

- **Procedures**
 - Forms, acceptance, thanks
 - Determine recognitions
 - Create a legacy/gift society



HOW will you market your endowment to donors?



- **FORM A MARKETING TEAM**
 - of generous givers!
 - who want to grow the endowment
 - that's diverse — young & old!
 - who *move* & influence others

- **CREATE A CULTURE OF GENEROSITY**
 - Focus on your donors' interests!
 - Tell stories that *inspire* donors
 - Build excitement across all ages
 - Remind people at every opportunity

- **HELP YOUR DONORS**
 - Offer a wills program
 - Encourage financial literacy for all
 - Focus on values-based spending

Contact

UNITED CHURCH FUNDS

plannedgiving@ucfunds.org
ucfunds.org

Cheri Lovell

cheri.lovell@ucfunds.org
212.729.2622