

# PROMOTING ENDOW IOWA

DONOR OUTREACH MADE SIMPLE – 3 STEP PLAN



*The Endow Iowa Tax Credit Program is changing communities across Iowa. To help your organization promote Endow Iowa, the Iowa Council of Foundations has developed and updated customizable communications materials. This mini-marketing plan contains three steps you can take to reach out to donors and professional advisors to make them aware of this special giving opportunity.*

## BEFORE YOU BEGIN

Prepare yourself and your advisory committee volunteers to discuss the Endow Iowa opportunity with news media, professional advisors and potential donors by reviewing the Endow Iowa **Messaging Points**. The document features a statewide perspective on Endow Iowa and includes a section that can be customized to communicate the impact of local gifts in your community.

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## 1 CONTACT PROFESSIONAL ADVISORS (OCT/NOV)

Professional advisors represent an important channel for reaching prospective donors. Advisors will also be looking for ways to help their clients. More than \$311 million in permanently endowed gifts have been leveraged since 2004, and this is an appealing message for clients who value the impact their charitable giving can have on their communities.

When choosing which materials to use, tap into your knowledge of the professional advisors you work with and decide which messages will work best for your target audiences.

### IDENTIFY:

You may already have a network of professional advisors who you connect with regularly. If not, start your list with those advisors who know your community foundation and those who have demonstrated an interest in community.

### CUSTOMIZE AND SEND:

Create and send advisor packets using the **Advisor Flyer**, as well as one of the two versions of the **Advisor Letter**. Consider personalizing the letters so that they mention any past connection to the advisor and appropriately respond to his or her type of business. Offer the community foundation's support and planned giving expertise.

### FOLLOW UP:

Soon after advisors receive the packages, call them. Use these tips for approaching advisors about Endow Iowa:

- Present Endow Iowa as an opportunity that their clients can take advantage of twice in the coming months—as year-end gifts and for gifts made after January 1. Note that the community foundation is able to help all clients achieve their charitable goals (which may or may not include Endow Iowa).
- Discuss opportunities that they can share with their clients (e.g., they can use Endow Iowa for a rollover gift through an IRA, the transfer of wealth estate planning, etc.).

## 2 RELEASE ENDOW IOWA NEWS TO THE MEDIA (NOV/DEC)

### IDENTIFY:

Make a list of local media contacts and other community networks (such as your Chamber of Commerce, Kiwanis or Rotary Club). If you don't already have a relationship with a reporter/editor, call or scan the media outlet's website to find the best contact. Other outreach ideas include:

- Funeral homes for memorial gifts
- Local nonprofits for agency endowments
- Churches and schools

### CUSTOMIZE:

Add local quotes, data and contact information to the template **News Release, Guest Column** or **Newsletter Content**. Use this for your newsletters or for your submission to other community-based newsletters.

### SEND:

Release the appropriate materials via email or in person. Follow up by placing a phone call to the reporter/editor/newsletter contact and offer to answer any questions. The **Messaging Points** may help you discuss Endow Iowa and address questions.

### CLIP AND USE:

If your local media publishes on the Internet, link to the article on your website or in e-newsletters. You may choose to use these articles to lend credibility in later conversations you have with donors or professional advisors.

### FOLLOW UP:

If your local media publishes an article related to Endow Iowa, be prepared to follow up with a letter to the editor affirming the benefits of the program and calling attention to the presence of your local community foundation. It may be helpful to use the customized portion of the **Messaging Points** to guide the content of the letter.

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## 3 TARGET DONORS WITH MAILINGS AND/OR VISITS (DEC/JAN)

### UPDATE:

Post the **Web Content** to provide up-to-date information on your website. Content should be posted before contacting donors.

### IDENTIFY:

List five current donors who are comfortable with the community foundation and their own current financial situations for face-to-face meetings. Create a larger list of current and potential donors to whom you can send the **Postcard** and/or **Flyer** in a targeted mailing.

### CONTACT:

Mail the **Postcard** and/or **Flyer** to the donors on your list. Arrange a face-to-face meeting via phone or email with the five individuals you have identified. What you choose to say in this call will depend on your history with each person. Some key points to use:

- This is *(Your Name)* from the *(Name of Community Foundation)*.
- I would like to discuss a special giving opportunity, the Endow Iowa Tax Credit Program.
- Do you have time to meet in person?

### MEET:

Prepare yourself by reviewing the **Messaging Points**. Begin the conversation by first connecting to the personal charitable interests of the advisor or donor and then by briefly describing the Endow Iowa opportunity. Be sure to bring along materials for the individual to take home, including the **Flyer**. Explain how donors can benefit from giving and the variety of giving options you offer. If you sense interest, offer to involve their professional advisor to discuss how they can make a difference in the community today, and for years to come.

*\*NOTE: If you plan to hold these meetings at year-end, be sure to mention Endow Iowa opportunities for the following year.*

### PROMOTE:

If individuals find Endow Iowa attractive, ask them if they know other people who may also want information about this special giving opportunity. Direct interested individuals to the **Web Content** posted on the community foundation website for facts about the program. Ask for permission to use their story with others.