

HOW TO GENERATE  
**MORE**  
MAJOR GIFTS &  
PLANNED GIFTS  
WITH  
**LESS MONEY**  
AND  
**REDUCED**  
**RESOURCES**  
AN INTRODUCTION TO  
**ENGAGEMENT**  
**FUNDRAISING**



# TODAY'S AGENDA

## **1- WHO IS THIS GUY?**

## **2- ENGAGEMENT FUNDRAISING**

- Strategy
- Tactics

## **3- EXAMPLES & LOW-COST IDEAS**

# WHO IS THIS GUY?

## AND WHY SHOULD WE LISTEN TO HIM?



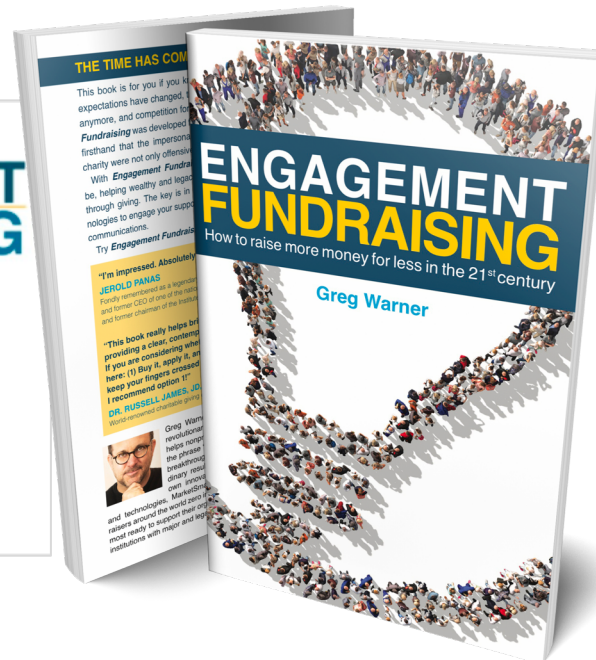
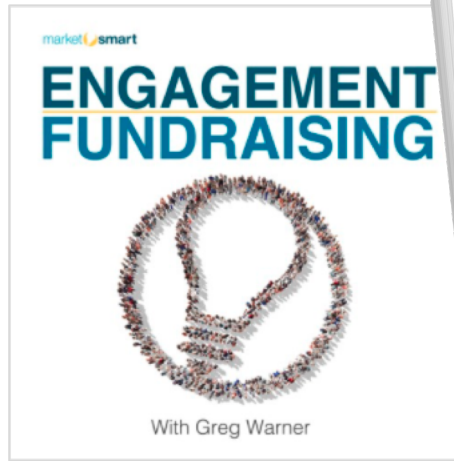
**greg warner**  
CEO & FOUNDER

market  smart

[imarketsmart.com](http://imarketsmart.com)

FUNDRAISING  
REPORT CARD 

[fundraisingreportcard.com](http://fundraisingreportcard.com)



# WHO IS THIS GUY?

## AND WHY SHOULD WE LISTEN TO HIM?



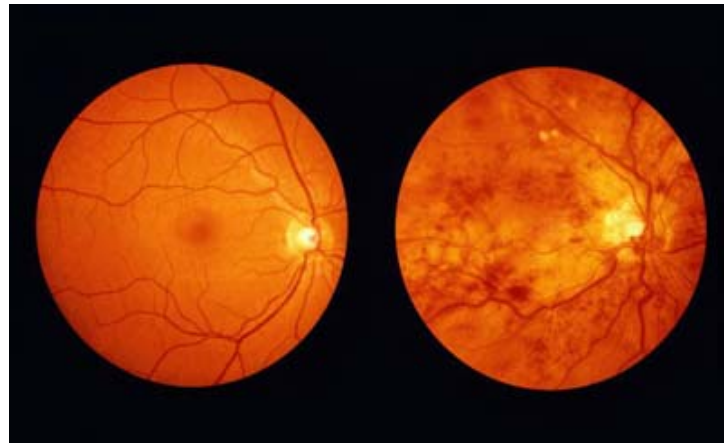
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# WHO IS THIS GUY?

## AND WHY SHOULD WE LISTEN TO HIM?



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## Wacky “marketing”?



- Tons of direct mail
- Spray marketing
- One-way
- Impersonal
- .....
- Poor “customer” service
- Sold my name
- Hard to opt-out
- Challenge volunteering
- Insulting/offensive

# Empathy for your challenges

Lack of **time**

Not enough **staff**

Tight **budgets**

**Travel** is time-consuming and expensive

**Qualifying prospects** is very difficult

What do **you** want to know



**Who** to call?



**When** to call?



**Why** they care?



**What** to say?

ENGAGEMENT FUNDRAISING

STRATEGY



# ENGAGEMENT FUNDRAISING

## PARETO PRINCIPLE



Just **20%** of the people own  
**80%** of the land

**THE 80/20 RULE**



# ENGAGEMENT FUNDRAISING

PARETO PRINCIPLE

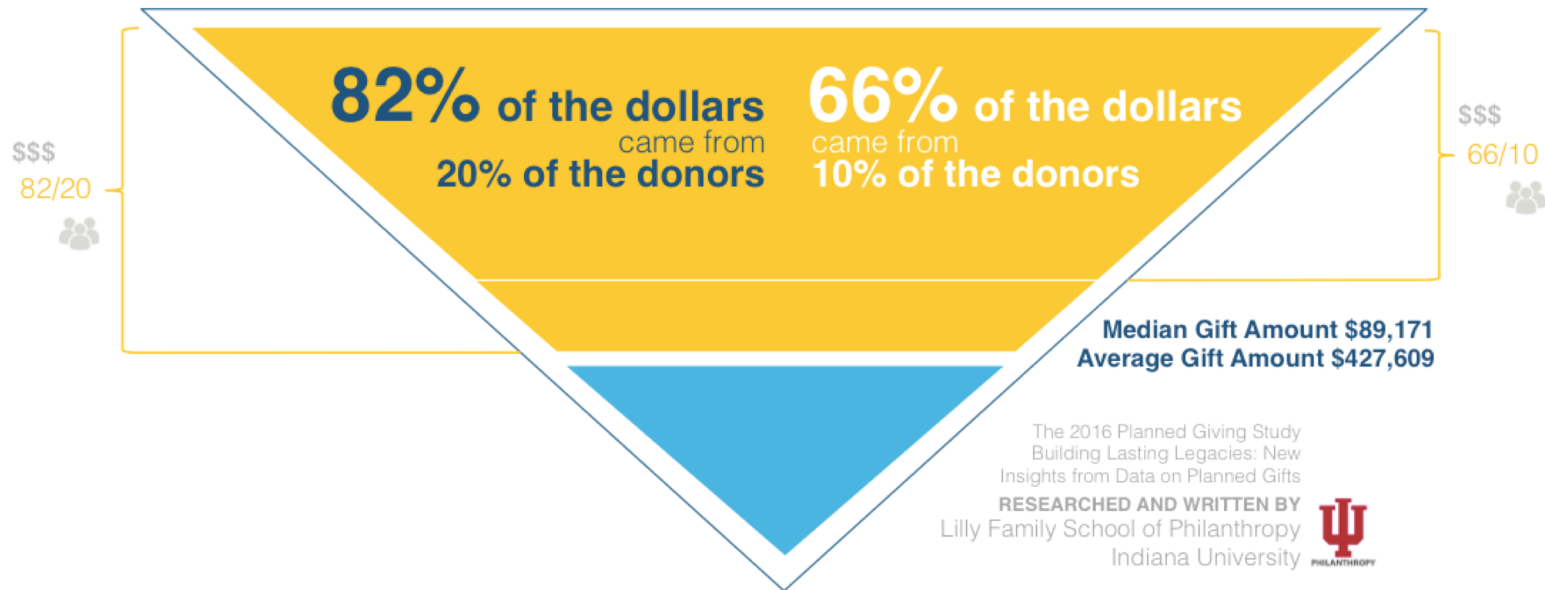
# MAJOR GIFTS & PLANNED GIFTS

THE 80/20 RULE

# ENGAGEMENT FUNDRAISING

## PARETO PRINCIPLE

4,269 planned gifts made to five universities across the U.S. were studied



## THE 80/20 RULE

# ENGAGEMENT FUNDRAISING

## PARETO PRINCIPLE

**Donors giving over \$5,000**

= **.7%** of an org's donor base  
make up **70%** of all  
donation revenue

**Donors giving under \$100**

= **80%** of an org's donor base  
make up only **7%** of all  
donation revenue

## THE 80/20 RULE

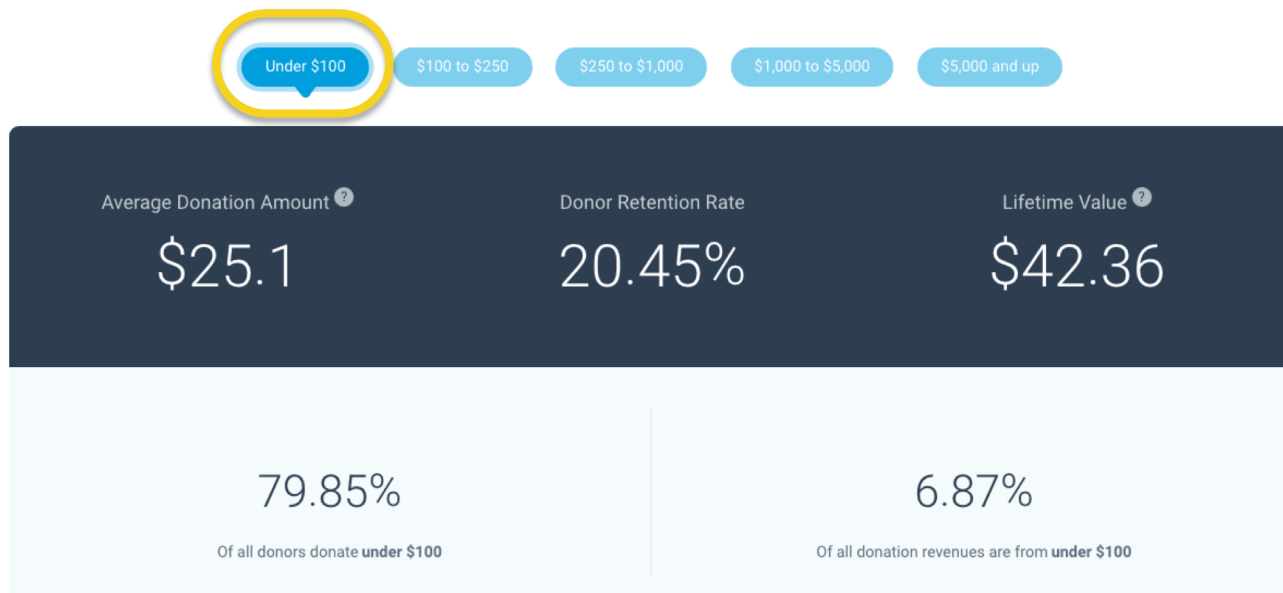
FUNDRAISING  
REPORT CARD 

Daily analysis of \$40+ billion in charitable  
giving using data from 4,200+ organizations

[fundraisingreportcard.com/benchmarks](https://fundraisingreportcard.com/benchmarks)

# ENGAGEMENT FUNDRAISING

## PARETO PRINCIPLE



## THE 80/20 RULE

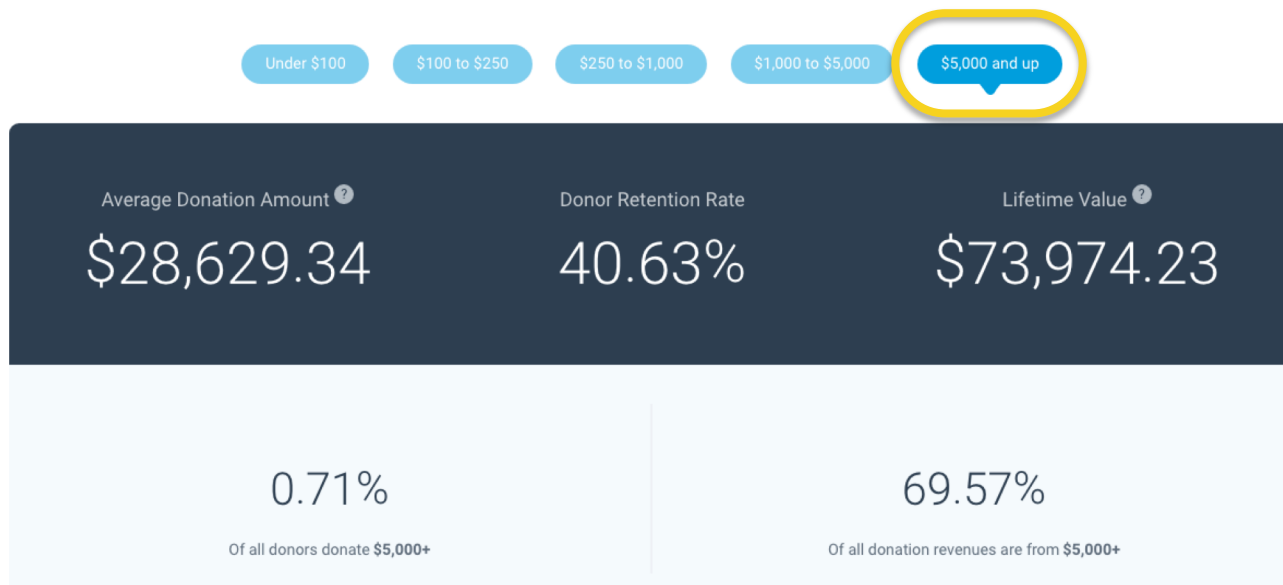


Daily analysis of \$40+ billion in charitable giving using data from 4,200+ organizations

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# ENGAGEMENT FUNDRAISING

## PARETO PRINCIPLE



## THE 80/20 RULE

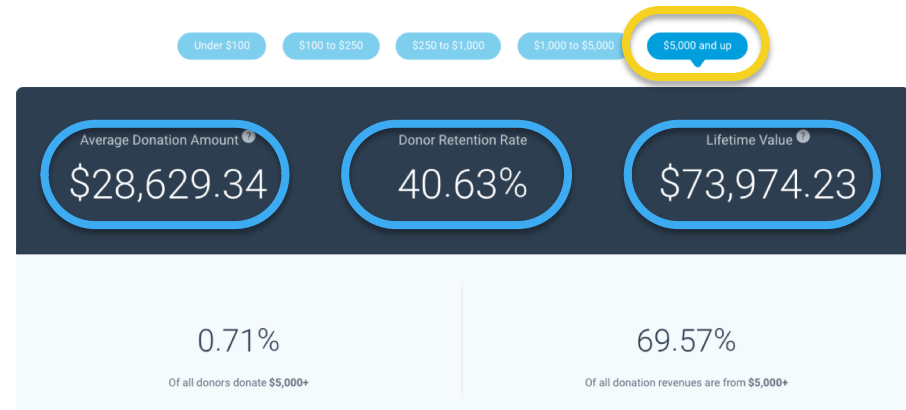
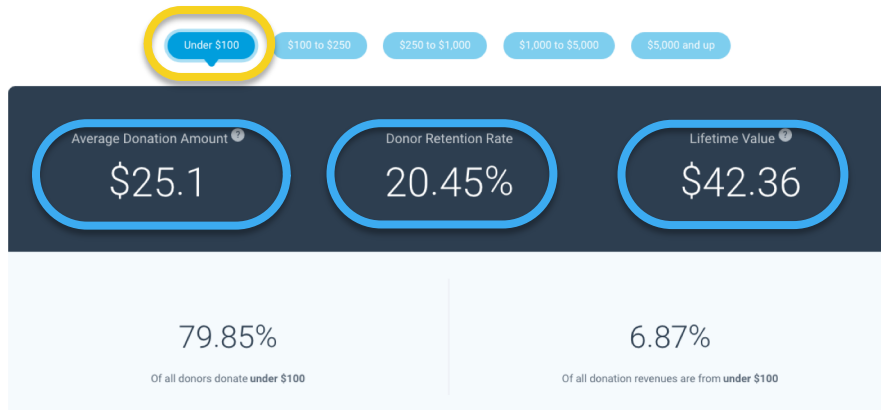


Daily analysis of \$40+ billion in charitable giving using data from 4,200+ organizations

[fundraisingreportcard.com/benchmarks](https://fundraisingreportcard.com/benchmarks)

# ENGAGEMENT FUNDRAISING

## PARETO PRINCIPLE



## THE 80/20 RULE



Daily analysis of \$40+ billion in charitable giving using data from 4,200+ organizations

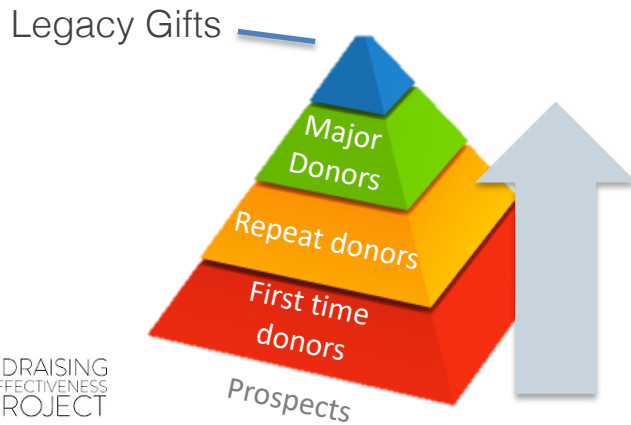
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# ENGAGEMENT FUNDRAISING

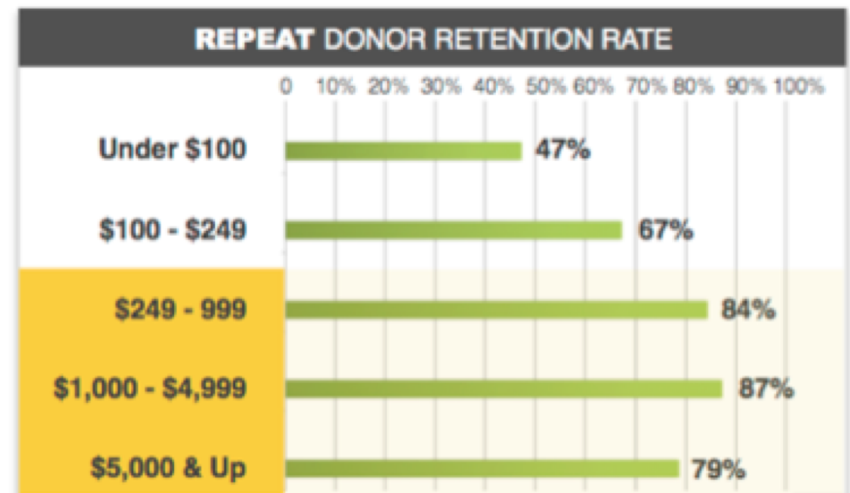
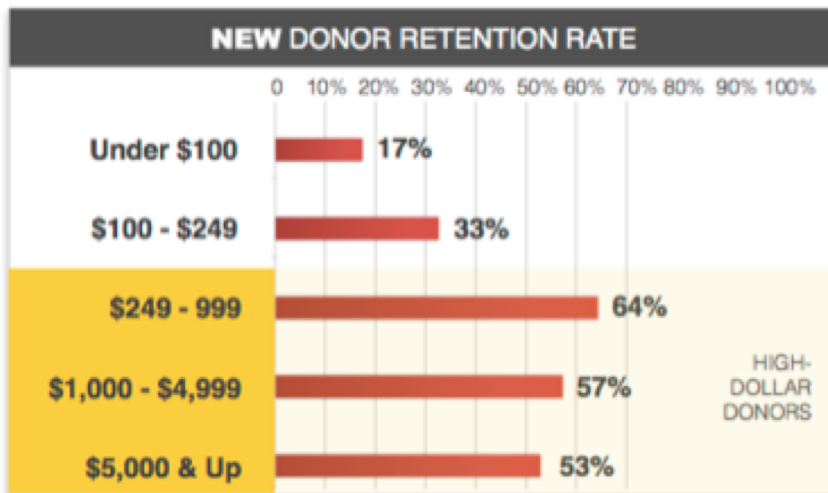
HOW MUCH DOES IT COST  
TO RAISE \$1?

# ENGAGEMENT FUNDRAISING

## DOES THE PYRAMID REALLY EXIST?



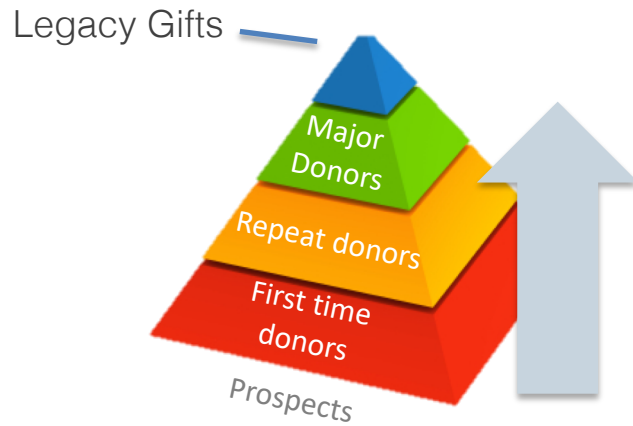
**New** high-dollar donors are more loyal  
**Repeat** high-dollar donors are more loyal





# ENGAGEMENT FUNDRAISING

## DOES THE PYRAMID **REALLY EXIST?**



Other Legacy Gifts

- Staff
- Volunteers
- Facebook likes
- Twitter followers
- Infrequent donors
- Non-donors
- Others

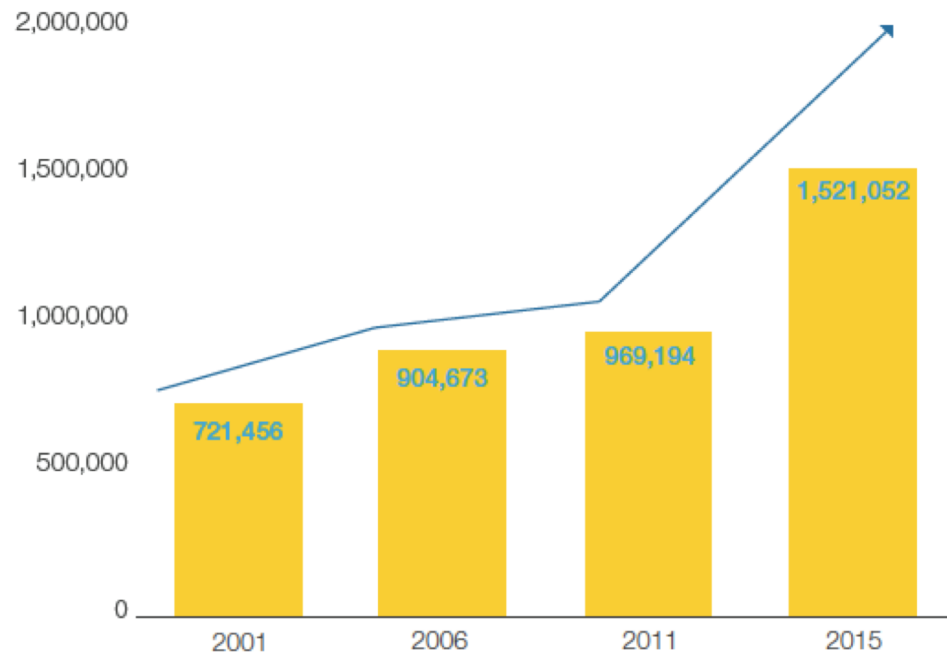
# ENGAGEMENT FUNDRAISING

YOU HAVE SERIOUS

**COMPETITION**

AND IT'S GROWING FAST

NUMBER OF U.S. PUBLIC CHARITIES, 501 (c) (3)



Source: National Philanthropic Trust



National  
Philanthropic  
Trust

# ENGAGEMENT FUNDRAISING

**DONORS ARE HOPPING AROUND**  
FROM ORGANIZATION TO ORGANIZATION



**WHY?**

**NOT GETTING WHAT THEY WANT!**

# ENGAGEMENT FUNDRAISING

**HOW CAN YOU**  
GIVE DONORS  
WHAT THEY WANT?

**GROW REVENUE**  
**AT LOWER COST?**

**ENGAGEMENT**  
**FUNDRAISING**

# STRATEGY

- 1 FOCUS ON 80/20 PARETO PRINCIPLE**  
MAJOR GIFTS & PLANNED GIFTS
- 2 MAKE HI-CAPACITY DONORS**  
**FEEL GOOD/TREATED LIKE VIPs**
- 3 LEVERAGE SMART IDEAS**  
FOR EFFECTIVE **ENGAGEMENT**

ENGAGEMENT FUNDRAISING

# BASICS



# ENGAGEMENT FUNDRAISING **BASICS**

## 9 Similarities

### “Fundraising” Relationships & “Real” Relationships

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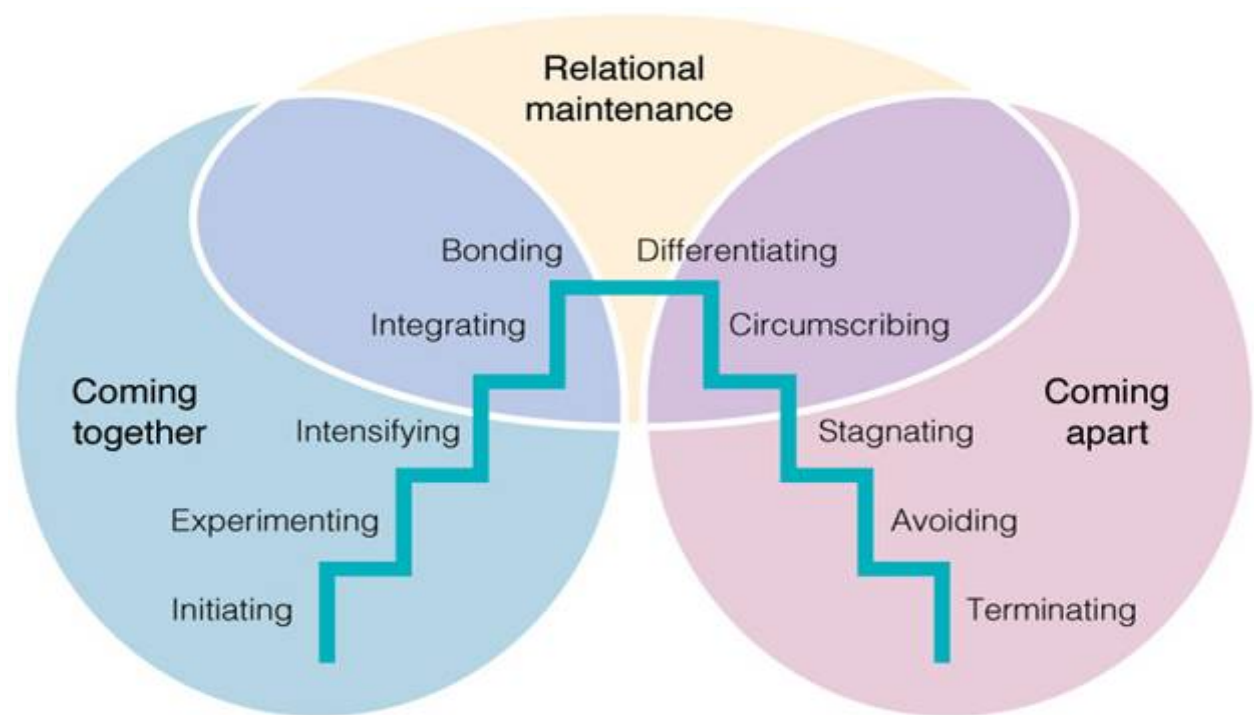
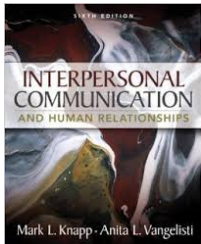
- 1. Trust is key** nothing happens without it
- 2. Relevant** personalized
- 3. Conversational** human, not formal
- 4. Two-way** talking *and* listening
- 5. Respectful** polite, considerate and fair
- 6. Valuable/meaningful** benefits for both
- 7. Easy and comfortable** convenient and relaxed
- 8. Multi-channel** phone, email, face-to-face
- 9. Strategic** bad strategies = bad results

# ENGAGEMENT FUNDRAISING **BASICS**

## Stages of a relationship



Mark Knapp literally wrote the book on interpersonal communication theories



Mark Knapp's Relationship Model



# ENGAGEMENT FUNDRAISING **BASICS**



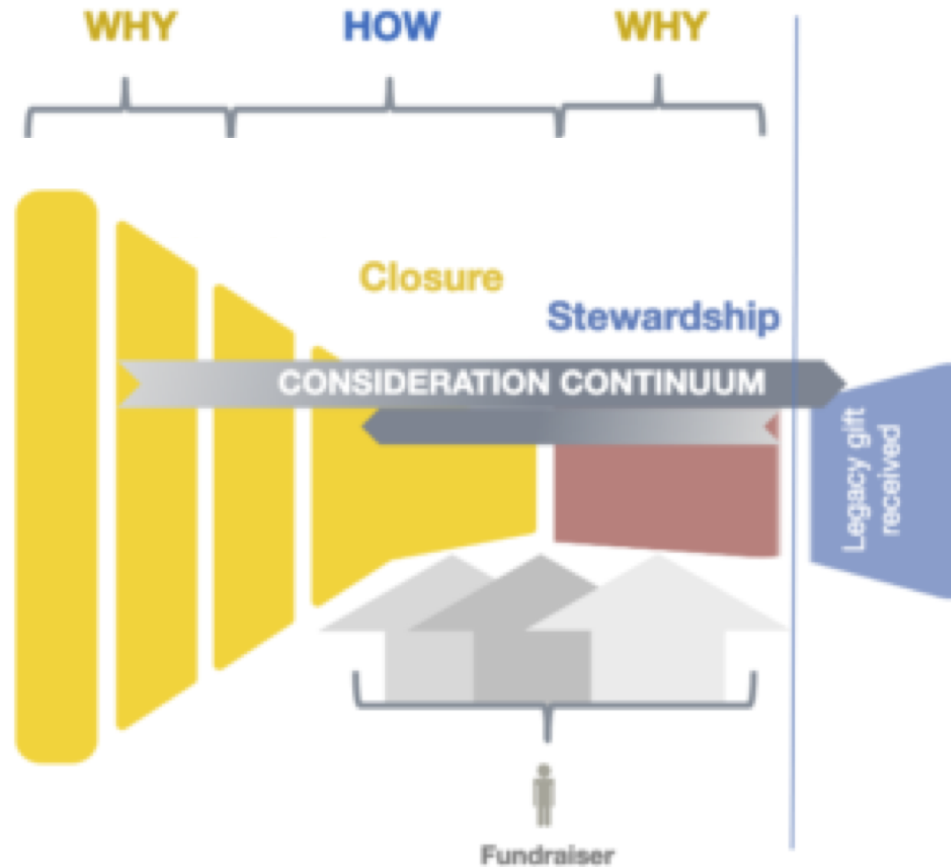
**LOW-DOLLAR  
IMPULSE-ORIENTED  
DECISIONS**

VS.

**HIGH-DOLLAR  
HIGHLY-CONSIDERED  
DECISIONS**



# ENGAGEMENT FUNDRAISING BASICS



# ENGAGEMENT FUNDRAISING

STRATEGY



BASICS

TACTICS

ENGAGEMENT FUNDRAISING

TACTICS



LIST

OFFER

TIMING

CREATIVE

# ENGAGEMENT FUNDRAISING



# LIST

# ENGAGEMENT FUNDRAISING

## 80/20 LIST SELECTION

**CONVENTIONAL WISDOM:** Review past transactional data

- ✓ Frequency of giving?
- ✓ Recency of giving?
- ✓ Longevity of giving?
- ✓ Total dollars given?



**UNCONVENTIONAL WISDOM:** Review 'verbatim' data

- ✓ Engagement?
- ✓ Involvement?
- ✓ Volunteerism?
- ✓ Board or committee?
- ✓ Why they care?
- ✓ Who taught them to care?
- ✓ Interested in honoring?
- ✓ Family foundation?
- ✓ Donor-advised fund?
- ✓ Childlessness?
- ✓ Age?

# ENGAGEMENT FUNDRAISING

Who is **most likely** to act

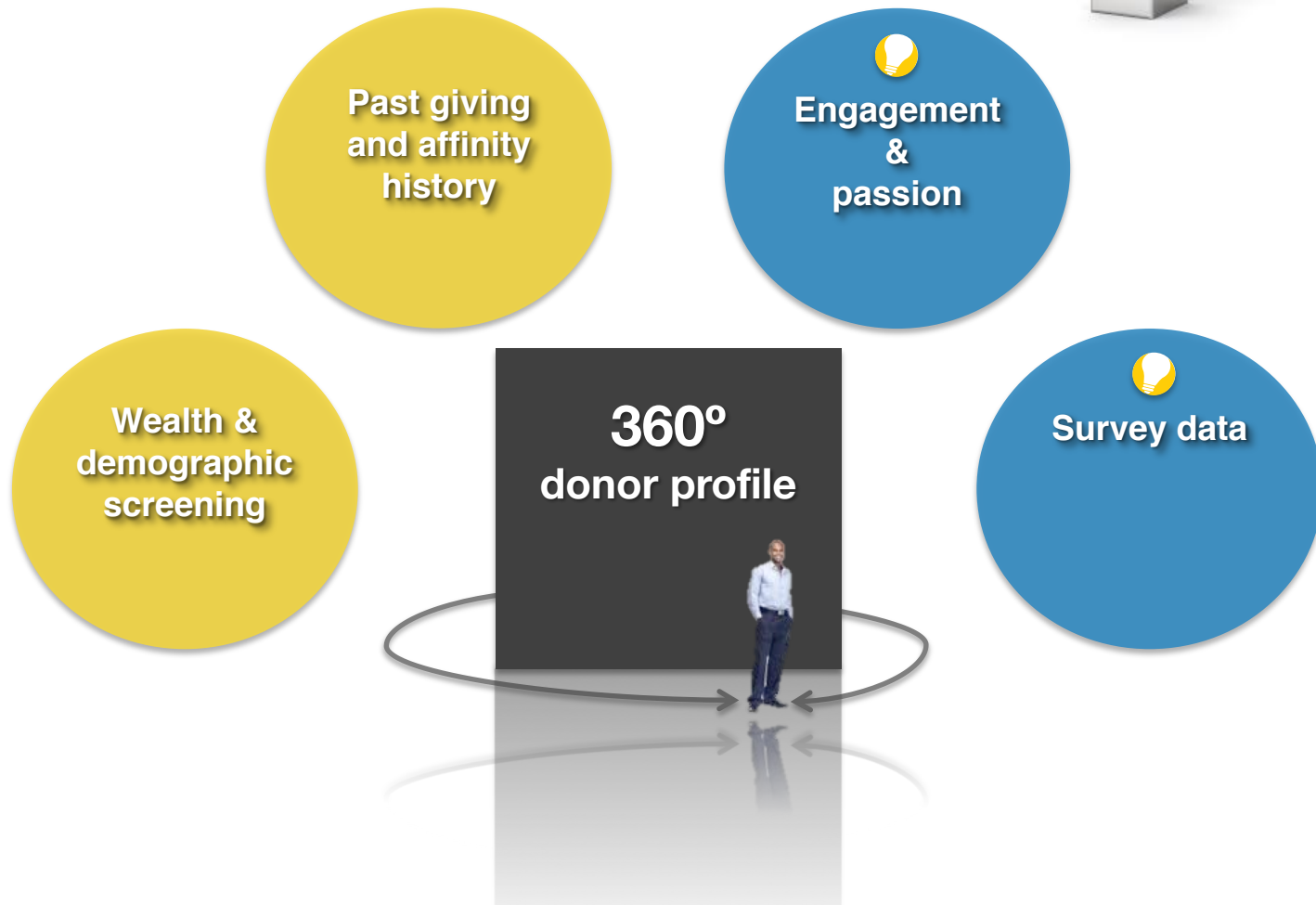


Past giving  
and affinity  
history

Wealth &  
demographic  
screening

# ENGAGEMENT FUNDRAISING

Who is **most likely** to act **now**





# ENGAGEMENT FUNDRAISING

LIST  
OFFER  
TIMING  
CREATIVE

PROVIDE  
AN OFFER



# ENGAGEMENT FUNDRAISING

**Offer value** to get and keep prospects **engaged**



# ENGAGEMENT FUNDRAISING

Offer value to get and keep prospects engaged



# CONVENIENT

# Is Your Engagement Offer Worthwhile?



"This stuff really works!"

## **DONOR OFFER** **VALUE CHECKLIST**

- Is it fun?
- Is it fair?
- Are you being honest and transparent?
- Will it educate or inform them?
- Is it sharable?
- Does it evoke emotion?
- Does it release dopamine and/or oxytocin (make them feel good)?
- Does it help them feel like they are the hero in their own life story (provide feelings of autobiographical heroism)?
- Does it give them a sense that they can live forever in the minds of others (provide feelings of symbolic immortality)?
- Does it enable them to give back or pay it forward to others?
- Does it allow them to feel that they are being altruistic?
- Does it provide a sense of community (a connection with others)?
- Does it give them notoriety and/or praise?
- Does it enable them to right some wrongs they want to change in our society?
- Does it give them a feeling that they are being religious or that they may be able to satisfy their religious dictates?

# ENGAGEMENT FUNDRAISING

## ENGAGEMENT FUNDRAISING

### WEAK OFFERS VS. STRONG OFFERS

WEAK  
OFFERS

Update you

Buy you a cup of coffee

Return address labels

Recipe

STRONG  
OFFERS

Take a donor survey to  
share your opinion

See the video about Jeff  
and why he made a gift

Download this helpful  
widget, calculator or tool

Tell your story

Honor, pay tribute to,  
commemorate someone  
you love dearly

# ENGAGEMENT FUNDRAISING

LIST  
OFFER  
TIMING  
CREATIVE



# TIMING

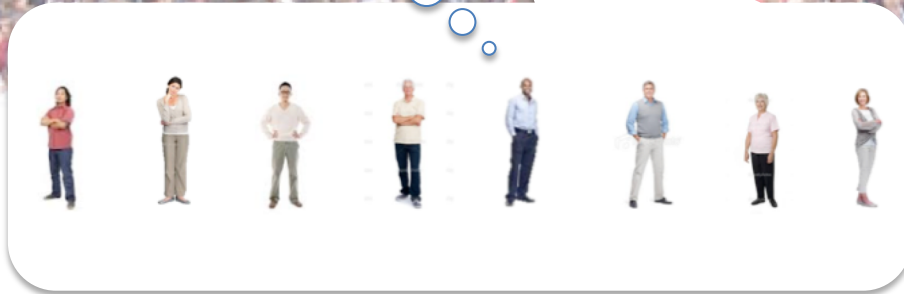


# ENGAGEMENT FUNDRAISING

## Timing



Engaged and considering a gift?



CONSIDERATION CONTINUUM

2019

2020

2021

2022

When should you reach out to a prospect?

# ENGAGEMENT FUNDRAISING

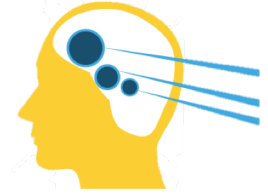
LIST  
OFFER  
TIMING  
CREATIVE

# CREATIVE





# ENGAGEMENT FUNDRAISING



Get them into the giving state of mind

**HELP THEM FEEL GOOD!**

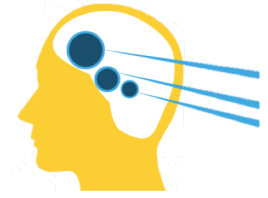
## 9 Similarities

“Fundraising” Relationships & “Real” Relationships

---

1. Build trust
2. Be relevant
3. Be conversational
4. Enable two-way communication/feedback
5. Be Respectful
6. Provide valuable/meaningful offers
7. Make it easy and comfortable
8. Use multiple channels
9. Think strategically – Be smart!

# ENGAGEMENT FUNDRAISING



Get them into the giving state of mind  
**HELP THEM FEEL GOOD!**

1



Symbolic immortality

Desire to continue to live on after death

2



Autobiographical heroism

Desire to be perceived favorably after death

3



Visualized autobiography

Seeing one's life from a third person perspective

4



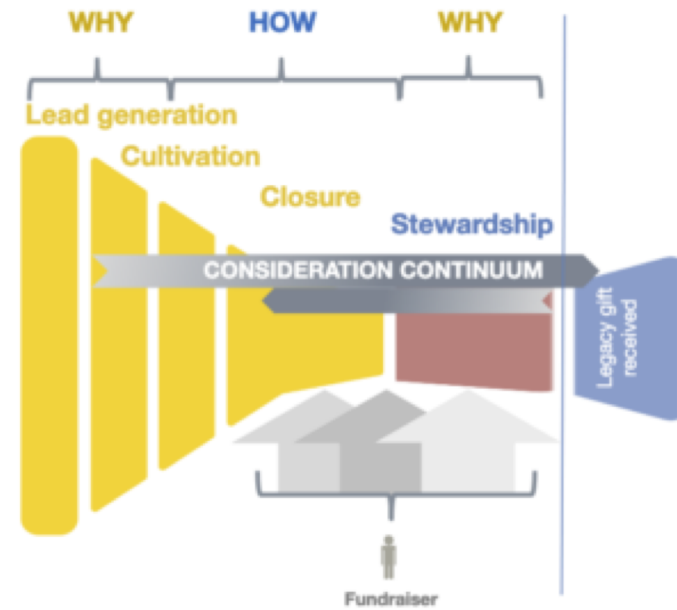
Commemorative immortality

Honoring, recognizing or paying tribute to others

# ENGAGEMENT FUNDRAISING

## FOR LEGACY GIVING

Help them get past their avoidance of the subject



Give them the “medicine”  
with good offers  
(like a spoonful of sugar)

# ENGAGEMENT FUNDRAISING

## Examples of creative that works!



Contact Information  
Call us: 757.965.6105  
Email us



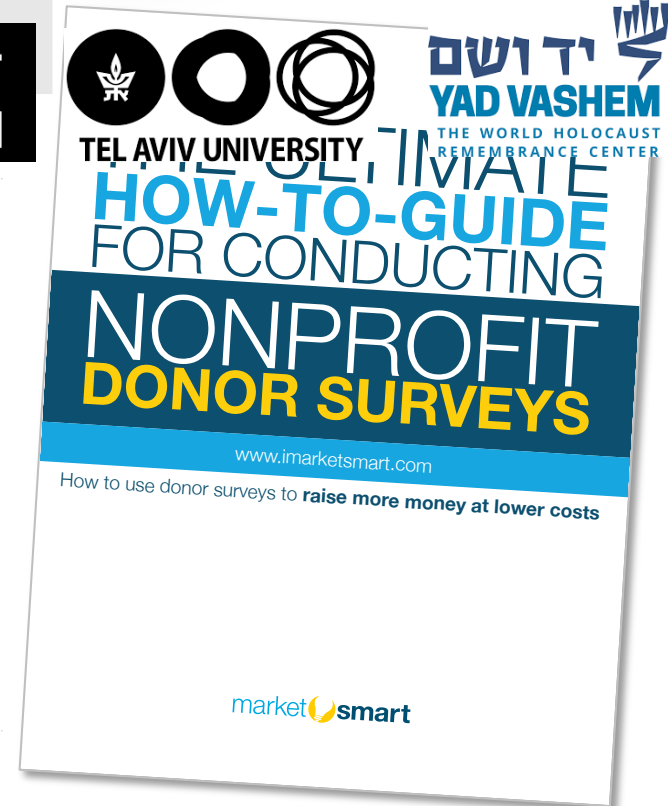
We Value Your Feedback.



1) Which of the following organizations do you belong to or engage with?

- Beth Shalom Village
- Chabad of Tidewater
- Congregation Beth El
- Hebrew Academy of Tidewater
- Jewish Family Service of Tidewater
- Ohel Shalom Temple
- Simon Family JCC
- Strelitz Early Childhood Education Center
- Temple Emanuel
- Temple Israel
- Tidewater Jewish Foundation
- Toras Chaim
- United Jewish Federation of Tidewater
- Other

Next



# ENGAGEMENT FUNDRAISING

## Examples of creative that works!



Contact Information  
Call us: 757.965.6105  
Email us



### We Value Your Feedback.

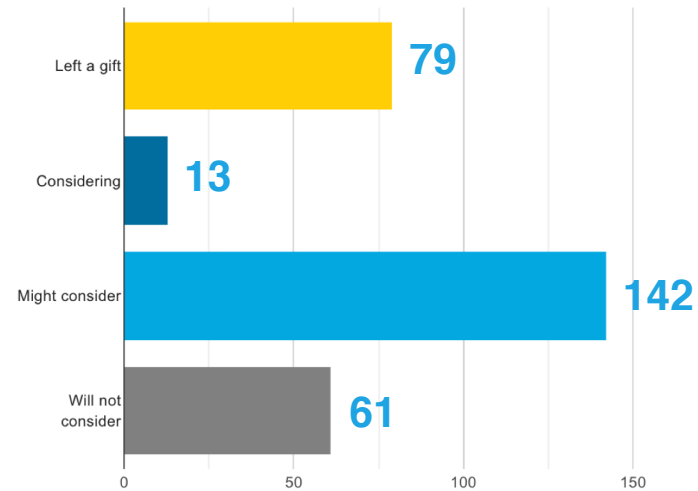
We need your help! Your responses to this *brief* survey will help us understand what's important to you so that we can better serve the Tidewater Jewish community and beyond.

1 2 3 4 5 6 7 8 9 10 11

#### 1) Which of the following organizations do you belong to or engage with?

- Beth Shalom Village
- Chabad of Tidewater
- Congregation Beth El
- Hebrew Academy of Tidewater
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- Temple Emanuel
- Temple Israel
- Tidewater Jewish Foundation
- Toras Chaim
- United Jewish Federation of Tidewater
- Other

Next




96 MAJOR GIFT LEADS

# ENGAGEMENT FUNDRAISING

## Examples of creative th



 [Social](#) | [Blog](#) | [About Us](#) | [News](#)



[Take Action](#) [Donate](#) [Blog](#) [Our Solutions](#) [Vision for a Healthy Ocean](#)

### My Ocean Story

Your ocean story is important to us! Help us create an archive Ocean Conservancy member stories about your love of the ocean by answering these questions.

1. What experiences and people have been important in shaping the values and passions that are the basis of your love of the ocean?
2. What part does giving to Ocean Conservancy play in expressing your values and passions?
3. Describe your vision of what a healthy ocean would mean to you and to our planet.
4. If you have a photo you would like to submit with your story, please upload it here.  
 No file chosen
5. Bequests left to Ocean Conservancy are a critical source of funding for protecting the ocean for future generations. You are in no way obligated to do so, but we hope you will tell us whether you have remembered Ocean Conservancy in your will or estate plan.
  - Yes, I have included Ocean Conservancy in my will or estate plan.
  - I intend to do so when I create or revise my will or estate plan.
    - I would like my bequest or beneficiary designation gift to  honor or  memorialize a friend or loved one (please provide the name of the person and your relationship).
6. Please send me more information to help me decide whether and how to leave an ocean legacy.
  - Will Planning Wizard, a step by step guide to creating or updating my estate.
  - Ocean Currents newsletter, with tips for giving under the new tax laws.
7. My Story
  - I give Ocean Conservancy permission to publish my story and the photos I have submitted online and/or in print.  
  
First Name \* Last Name \*  
  
Email Address \* Zip  
  
Phone \*

Ocean Conservancy makes careful use of your support, and holds high ratings from charity watchdogs.

# ENGAGEMENT FUNDRAISING

## Examples of creative that




### Industry Centennial Challenge Special legacy gift recognition opportunity for National Home Furnishings Industry supporters.

Dear City of Hope supporter,

As part of the Industry Centennial Challenge, we will [inscribe a plaque in our beautiful Rose Garden](#) in your honor or in celebration or memory of a loved one — if you notify us by December 31 that you have made City of Hope a beneficiary of your estate plan.

Qualifying gifts include a bequest in your will or trust and naming City of Hope a beneficiary of your retirement plan, life insurance policy or other financial account.

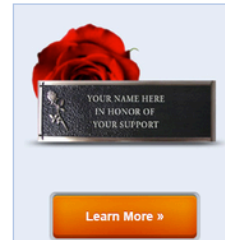
To be eligible for a [Rose Garden plaque](#), we ask that you provide us with information about and documentation of your intention. This also is the best way to ensure that we receive the gift you have planned for us.

[Learn more about this opportunity here](#) or by contacting me at **800-232-3314** or [industrychallenge@coh.org](mailto:industrychallenge@coh.org).

Sincerely,



**Amy Goldman**  
Vice President, Planned Giving  
[industrychallenge@coh.org](mailto:industrychallenge@coh.org)  
800-232-3314



"We have been moved by the passion and dedication of City of Hope's talented doctors and staff. A bequest in your will for City of Hope is an effortless way to help."

-Hodges and Joe Carroll  
National Home Furnishings Industry supporters and Industry Centennial Challenge leaders

This information is not intended as legal, accounting or other professional advice. For assistance in charitable planning, always engage the services of a qualified professional.

You are receiving this email at because of your relationship with City of Hope.  
[Unsubscribe or update email profile](#) | [City of Hope Privacy Policy](#)

This email was sent by: City of Hope, 1500 E. Duarte Road, Duarte, CA 91010

# ENGAG

# Examples of

**JDRF** IMPROVING LIVES. CURING TYPE 1 DIABETES.

**THE 2012 JDRF LEGACY CHALLENGE IS NOW CLOSED.**

If you have questions about leaving a bequest in your will or trust to JDRF, visit [www.planwithjdrf.org](http://www.planwithjdrf.org) or call us at 877-533-4483.

**REQUEST INFORMATION**

When you include JDRF in your estate plans by December 31, 2012, our Legacy Challenge sponsors will make an immediate \$1,000 DONATION in your honor to support current type 1 diabetes research.

**SUPPORT DIABETES RESEARCH TOMORROW AND TODAY. HERE'S HOW:**

Include JDRF in your charitable/estate plans by December 31, 2012.

Choose one of the options above or CONTACT US to let us know you have participated.

Our Legacy Challenge Sponsors will make an immediate \$1,000 cash donation in your honor.

Your legacy gift will help ensure that research continues until a cure is found.

**MESSAGE FROM A SPONSOR**

“ I want to do everything I can to make sure my daughter doesn't have to suffer from type 1 diabetes for the rest of her life. ”

~LARRY WALD, LEGACY CHALLENGE SPONSOR, JDRF LONG ISLAND CHAPTER

**HELP US REACH OUR GOAL**

Goal Reached

\$180,000 GOAL

**CREATE A LEGACY OF HOPE**

The most heartfelt way you can show a loved one with type 1 diabetes how much you care is by helping find a cure for the disease.

Now, through the JDRF Legacy Challenge, you can increase support for promising research today while also making a lasting impact in the fight against diabetes in the future.

When you participate, you'll be welcomed into our BETA Society and receive a distinctive lapel pin, as well as other important benefits.

Please take part in the JDRF Legacy Challenge. It's a simple yet powerful way to make life better now for someone you love with diabetes while giving hope for a future free of the disease.

**CREATING YOUR LEGACY VIDEO**  
Featuring JDRF founders and members of the BETA Society.

# SING





# ENGAGEMENT FUNDRAISING



## Examples of creative

**1** Tell Your Story or Create Your AUTOBIOGRAPHY

**Ocean Conservancy**  
Take Action Donate Blog Our Solutions

### My Ocean Story

Your ocean story is important to us! Help us create an authentic Ocean Conservancy story by answering these questions.

1. What experiences and people have been important in shaping the way you view the ocean?
2. What part does going to Ocean Conservancy play in expressing your passion for the ocean?
3. Describe your vision of what a healthy ocean would mean to you and your family.
4. If you have a photo you would like to submit with your story, please upload it here.

**Benefits left to Ocean Conservancy are a critical source of funding for our programs. You are in no way obligated to do so, but we have a memorial Ocean Conservancy in your will or estate plan.**

Yes, I have included Ocean Conservancy in my will or estate plan.  
 I intend to do so when I create or revise my will or estate plan.  
 I would like my bequest or beneficiary designation gift to Ocean Conservancy to be made on the date of the event and your organization's website.

**Please send me more information to help me decide whether and how to support Ocean Conservancy.**

Bill Planning Wizard, a step by step guide to creating or updating my will or beneficiary designation with tips for going under the new tax law.  
 Ocean Conservancy newsletter, with tips for going under the new tax law.

**My Story**

I give Ocean Conservancy permission to publish my story and the photos I submit.

First Name \* Last Name \*  
Email Address \* Zip \*  
Phone \*

Submit My Story

Ocean Conservancy makes careful use of your support, and holds high esteem for donor workbooks.

## MY STORY

A Gift for My Loved Ones

**4** Create Your AUTOBIOGRAPHY MEMOIR MAKER CAMPAIGN

### MY STORY

A Gift for My Loved Ones

CHALLENGE

2. Our TOURNAMENT

GOAL

GOAL

VIDEO members

# ENGAGEMENT FUNDRAISING

# LOW-COST IDEAS



# LOW-COST IDEAS

## Employ “3-to-1 fundraising”

[www.imarketsmart.com/321](http://www.imarketsmart.com/321)



Supporter name	Thank 'em	Report results	Offer engagement	Ask again
Michelle Brown	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# ENGAGEMENT FUNDRAISING

## LOW-COST IDEAS

STEWARDSHIP,  
CULTIVATION & LEAD  
GENERATION

### PIZZA PARTY MAJOR GIVING

1



2



3



# ENGAGEMENT FUNDRAISING


## LOW-COST IDEAS

BUILDING  
AWARENESS &  
GENERATING LEADS

## INSERTS IN DONATION RECEIPT LETTERS

0001

**Your planning information  
is always available online at:**



**Plan for your family, yourself and others.**  
Log on to learn more about:

- How to prepare a will,
- How to establish an annuity for life that pays income higher than current rates,
- How to reduce estate taxes,
- How to leave more money to your family,
- The benefits of establishing a trust,
- How your donations are spent by the Association.

**American  
Diabetes  
Association.**  
(703) 540-1500 Ext. 2164  
giving@diabetes.org

Place  
Stamp  
Here

American Diabetes Association  
1701 North Beauregard Street  
Alexandria, VA 22311

If you do not have computer access, please print your name, address and phone number  
clearly in the space provided and your information packet will be mailed to you.

<input type="checkbox"/> How to prepare a will,	<input type="checkbox"/> Reducing estate taxes,
<input type="checkbox"/> How to establish an annuity that pays income higher than current rates,	<input type="checkbox"/> How to leave more money to your family.

I am considering leaving the  
Association in my estate

I have already left the Association  
in my estate.

Name \_\_\_\_\_  
Address \_\_\_\_\_  
Telephone \_\_\_\_\_

American Diabetes Association  
**Manager, Planned Giving**  
1701 North Beauregard Street  
Alexandria, VA 22311

# ENGAGEMENT FUNDRAISING

## LOW-COST IDEAS

BUILDING  
AWARENESS

## SOCIAL MEDIA ANNOUNCEMENT

**facebook**

City of Hope is on Facebook. To connect with City of Hope, join Facebook today.

[Join](#) [Log In](#)

[View Edit History](#)  
**City of Hope**

Ron Wardwell, a cancer survivor, Vietnam veteran and 18-year City of Hope volunteer, talks about why he's leaving a legacy gift to [City of Hope](#). "I hope my gift can play a role in making sure needs can be met for future patients."

**Ron Wardwell, City of Hope volunteer says bequest was an easy decision**  
[givehope.cityofhope.org](http://givehope.cityofhope.org)

October 2 at 7:57pm · Edited · Public  
20 Comments

Paula Rodelo and 224 others like this.

**Cecilia Vasquez**  
Thanks Ron for always going above and beyond the call of duty, lots of love from EHS team !!   
 3 · Oct 2

**Priscilla Randomanski**  
Hope your heart is full with all the good you do. See you at COH soon.  
 2 · Oct 2

**Ruby Kong**  
Ron you are my inspiration. You done so much for city of hope and the Huntington. So glad you are my friend.  
 2 · Oct 2


**Leslie Allen**  
Ron is an amazing person!!! He has helped me on a couple of occasions! My first chemo appt he saw me and told me it was ok to just come and sit and relax in the biller center  
 2 · Oct 2

### Bequest for City of Hope was an easy decision for Ron Wardwell

September 19, 2014 | by [Give Hope Staff](#)

308 0 1 0 1

Leaving a Legacy at City of Hope - with Ron Wardwell



# ENGAGEMENT FUNDRAISING

## LOW-COST IDEAS

## PLANNED GIFT MARKETING


## LARGE VISUAL DISPLAYS

BUILDING  
AWARENESS

"Your generosity could completely change my life, and the lives of others of all ages who deal with diabetes every day."

Please consider a gift to benefit others in your will or estate plan

Learn more at [www.myplanwithada.org](http://www.myplanwithada.org)

 **American Diabetes Association.**  
American Diabetes Association  
Department of Individual Giving

 **A LEGACY FOR TOMORROW**

HONOR CATEGORIES

LEGACY DONORS

LEGACY DONORS

LEGACY DONORS



# ENGAGEMENT FUNDRAISING

## LOW-COST IDEAS

### PLANNED GIFT MARKETING

#### UBIQUITOUS MESSAGES

- on emails;
- business cards;
- letterhead;
- mailers;
- reply forms;
- booklets;
- magazines;
- articles;
- photos;
- banners;
- invitations;
- research reports;
- website pages, etc.

Many of our supporters have made a gift to [organization name] in their will or estate plan.

Would you consider such a gift?

If so, it is important that you please be sure to use the following legal language:

[Place language here]

[Tax ID # here]

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# ENGAGEMENT FUNDRAISING

## LOW-COST IDEAS

## PLANNED GIFT MARKETING

## ADS IN NEWSLETTERS WITH A REPLY DEVICE

BUILDING  
AWARENESS &  
GENERATING LEADS



FREE Personalized Estate Planning Information from a source you know and trust.

[www.planwithada.org](http://www.planwithada.org)

Please check one or more:

- I would like information on how to prepare a will.
- I would like information on how to reduce estate taxes.
- I would like information on how to leave more money to my family.
- I would like information on the benefits of establishing a trust.
- I would like information on establishing a gift annuity that pays income higher than current market rates.
- I would like information on how my donations are spent.

Please check one:

- I have left the American Diabetes Association in my will and would like to receive a FREE biannual subscription to *Forfront Magazine*, the premiere source of diabetes research news and other reports on how my donations are being used.
- I am considering leaving the American Diabetes Association in my will.
- I have made alternative arrangements and will NOT be leaving the American Diabetes Association in my will.

Name \_\_\_\_\_

Telephone (include area code) \_\_\_\_\_ E-mail \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Please complete card, fold, and tape before mailing. PPS08029EW03

**American Diabetes Association**

Questions? Contact our Director of Estate Planning at (888) 700-7029 or email [giving@diabetes.org](mailto:giving@diabetes.org).

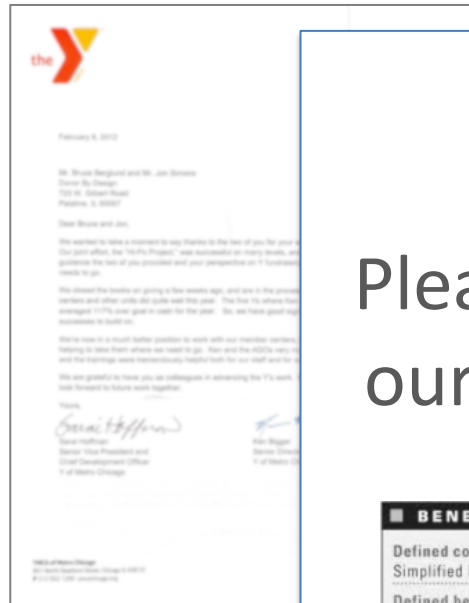
# ENGAGEMENT FUNDRAISING

## LOW-COST IDEAS

BUILDING  
AWARENESS &  
GENERATING LEADS

## ASK YOUR BOARD AND VOLUNTEERS

*start here* →



Please take  
our survey

BENEFICIARY DESIGNATION CHECKLIST	
Defined contribution plans (e.g., 401(k)s, 403(b)s, 457s, Simplified Employee Pension plans, etc.)	<input type="checkbox"/>
Defined benefit plans (e.g., pensions)	<input type="checkbox"/>
Individual Retirement Accounts	<input type="checkbox"/>
Life insurance	<input checked="" type="checkbox"/>
Accidental death & dismemberment insurance	<input type="checkbox"/>

# ENGAGEMENT FUNDRAISING

- ✓ Understand the donor's **consideration process**
- ✓ Construct an **offer** that delivers **value**
- ✓ Develop **creative** that draws **engagement** (if done properly)
- ✓ Surveys are amazingly **effective**

SUMMARY





**greg warner**

CEO & FOUNDER

market  smart

THANK YOU 

FREE RESOURCES AVAILABLE AT:  
[imarketsmart.com](http://imarketsmart.com)

FUNDRAISING  
REPORT CARD 

[fundraisingreportcard.com](http://fundraisingreportcard.com)  
[fundraisingreportcard.com/benchmarks](http://fundraisingreportcard.com/benchmarks)