

## **Marketing Your Council**

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How are new ideas generated? One way is to think in terms of something you are very familiar with and translate those concepts to a different project. How can this technique work to help generate new ideas for marketing your council? By thinking in terms of what many of you know best--fundraising. You understand how to generate giving results using proven fundraising techniques. So, try translating those techniques into methodologies for marketing your council.

The organizational foundations that must first be in place for good fundraising must also be in place for good marketing. Make sure you have the following agreed upon and well articulated for your council:

### **I. Mission**

- A. A brief written statement that articulates *why* your council exists; the *outcome* you were formed to achieve. This should not be a list of services you provide or people you serve.

A sample council mission statement:

[Our council] exists to increase the quality and quantity of charitable gift and estate planning in our community.

### **II. Case for Support**

- A. A statement(s) of the benefit that the council delivers to constituents and why someone should believe that the council can deliver that benefit to them. The case for support should concentrate on the "value" your council provides, not individual programs or services.

A sample council case for support:

Our council helps fundraising professionals increase charitable giving to their organizations and helps financial planning professionals deliver better value to their clients. [The benefit] Our council delivers a combination of charitable gift and estate planning knowledge, resources and relationships that cannot be found anywhere else in our community. [The reason to believe]

### **III. Make Good on Your Promises**

- A. Deliver what you promise and provide evidence that you've done so. Evidence could come in the form of testimonials, summaries of programs, reporting evaluation results, etc.

## Fundraising (and marketing) Methodologies

Brainstorm each area and identify strategies that your council can employ to better market using each technique:

- IV. Direct Mail
  - Written and electronic
  
- V. Special Events
  - Social events
  - Awards
  - Programs geared and marketed to specific target prospect groups
  - Joint programs
  
- VI. Campaigns
  - Annual Membership Drive
  - "Member Get-a-Member" campaigns
  
- VII. Major Gifts
  - Identify council ambassadors or champions who can provide leadership and visibility, especially to specific target markets. Give them "tools" and assignments to help them represent your council.
  
- VIII. Planned Giving
  - What is a foundational key to planned giving? A "recognition society". Give recognition to those who provide leadership and bring success to your efforts. Make council leadership and membership prestigious by recognizing and rewarding those who serve and participate.