

PPP/Planned Giving Council Promotion
Elevator Speeches: Quick Messages About Membership Benefits

Be prepared with a quick response when membership prospects or other people whom you'd like to influence ask why they should care about your planned giving council. The PPP Board of Directors suggests the following.

Fundraisers (generalists)

They care about us because: We're the first resource for those who want to know more about philanthropic planning, or who would like to have access to those who know more.

We offer programs in both the **art and science of philanthropic planning**.

We're the source for best practices, both locally and nationally, through our association with PPP.

We're not exclusive—we're a **safe place for the newbie**; we're friendly and inclusive.

We have various learning opportunities, in addition to our regular meetings.

How to Communicate: Talk with development staff at all levels; share info from council with director of development, CFO, etc.

Advisors (attorneys, financial advisors, accountants, etc.)

They care about us because: We are the place to meet clients, potential clients and referral sources.

We offer a **competitive edge** over advisors who don't know about philanthropic planning or haven't met nonprofits in their community.

We can show advisors how to evaluate whether a nonprofit is a good investment for clients; how to gain access to top nonprofit people.

How to communicate: Offer programs targeted at advisors and make contact with their local professional groups; host PPP virtual seminars that offer CFP and/or CFRE credit and seek other opportunities to offer CEUs; be sure to include networking time at every meeting.

Public (donors, recipients of charity services, elected officials, regulators, the media)

They care about us because: We promote industry-accepted standards that **make giving safe** and protect donors from abuse. Their philanthropy is supported by an honorable profession.

We advocate for legislative/regulatory conditions that make giving easier.

Philanthropy is an important American tradition; we help them establish a philanthropic legacy and become part of that tradition.

How to communicate: Cooperate in National Philanthropy Day (e.g., give a legacy award); promote local planned giving days; prepare local council leaders to deliver the message in their own communities; educate local media about philanthropy.

Business Partners/Sponsors

They care about us because: Regardless of our size, the council is the primary place in the community where gift planners can be found, for those who seek that target market.

Business partners have a vested interest in helping the council achieve its mission, since **we are the pipeline for their business.**

How to communicate: Offer opportunities for web-based advertising; create partnership levels that go beyond one transaction or event; engage partners in offering discounts for PPP members.

Related organizations (local chapter of AFP, nonprofit forum, etc.)

They care about us because: We teach their members to have donor conversations at the highest level.

We offer mentoring and other resources that help their members understand gift planning.

We recognize that partnership is challenging among organizations that are essentially competitors—**we are seeking win-win situations** that benefit the entire community.

How to communicate: Collaborate on programs of mutual interest with local affiliates of related organizations (AFP, estate planning council, etc.); trade exhibit or advertising space at events or in newsletters; offer reduced meeting fees to members of related organizations;