Twelve Months of Council Marketing:
A Sample Calendar

January

Hold a special meeting with a topic of interest to CEOs, VPs of Development, Executive Directors, and other key organizational decision makers.

Suggested topics:
- How valuable are planned gifts?
- What's the cost to raise a planned gift dollar?
- A donor's perspective on the possibilities of "blended" giving (combining current and deferred gifts)

Notes: These are the folks who decide whether an organization supports staff membership in your council. Show them that you are worth it. Encourage members to bring a key organizational leader to the meeting as a free guest. Give members written or electronic information about the program that can be shared in advance. Check the leadership track at the National Conference on Philanthropic Planning for program topic ideas.

February

Call, send a note, or email every CEO or organizational leader who attended and thank them for supporting their staff member's participation in your council.

Notes: Ask CEOs if they have thoughts on areas they'd like staff to get more training in.

March

Hold a joint meeting with the local AFP chapter.

Notes: Choose a topic combining planned and major gifts. This is a good opportunity for a panel to discuss successful collaborations or how to move a planned gift prospect to a major current gift or visa versa.

April

Send a note to all AFP members who attended with a copy of your program calendar for the rest of the year. Allow them to attend the next meeting at the member rate.

May

Hold an Intro to Gift Planning mini-conference.

Notes: Introduction to techniques in the morning; lunch panel on how to introduce planned giving into donor calls and conversation; afternoon on steps to getting started. Do a mass mailing or fax to all of the nonprofits in the area. Give a discounted price for the entire day and offer each segment separately.

June

Hold a joint meeting with the local Estate Planning Council. Plan far enough in advance to get CE credit. Focus on a charitable planning vehicle or ethics.

Notes: To learn more about certifying your programs for CE credit…
For CFPs: www.cfp.net
For attorneys: www.abanet.org

July

Send a note to all guests who have attended and not joined. Include information on your September program. Invite them to attend at the member rate.

August

Ask all council members to give you the names and contact information for three prospects. Send each prospect a personal invitation from the council board (with names and affiliations listed), to attend.

September

Hold your annual new member recruitment meeting

Notes: Here's the time to bring in a top national speaker, a very well known charity CEO, or big donor that lots of folks will want to hear. Provide some incentive(s) for bringing guests--free or discounted meal, prize for the most guests, etc. Plan to introduce all guests. Have membership information available. Distribute next year's program calendar

October

Follow-up calls to all guests who attended the September meeting. Direct them to the Partnership's website for a membership application (www.pppnet.org).

November

Co-sponsor Philanthropy Day activities. Include a LEAVE A LEGACY® award as a part of National Philanthropy Day

December

Send a holiday greeting to as many prospects as possible including a copy of next year's program calendar.

Every Meeting:

- Introduce all guests
- Use the Partnership's "talking points" to give a brief report on national activities and initiatives
- Have two board members stand at the door and greet everyone as they arrive—ask any guest without a "sponsor" to sit with you.

Other ideas:

- If you are targeting certain fundraisers and/or advisors in your community, ask them to participate in a program panel or facilitate a roundtable topic discussion--getting them in the door is the first step. Follow-up is the second.

- Offer to plan a program on charitable planning for AFP, the Estate Planning Council, United Way agency execs, etc.

- Contact the Partnership to see if we have extra copies of *The Journal of Gift Planning* that you can give to prospects with an invitation to membership.

- Leverage Partnership activities--Put your council affiliation on your web homepage with a link to www.pppnet.org.

- Cross-promote programs with the local estate planning council or bar association. Be sure the newsletter editor or web master for these groups is on your mailing list; promote their programs to your members, as appropriate.