



The 23rd Annual

Planned Giving CONFERENCE

presented by the **Northern California Planned Giving Council**

in association with Colonial Consulting, LLC

CULTIVATION / STEWARDSHIP / MARKETING TRACK

Session 2: 11:00 am - 12:15 pm

Topic:

Mounting Successful Planned Giving Cultivation and Stewardship Events

Presented by:

Donna M. Bandelloni

Workshop Summary:

In this session we will examine a number of strategies to make donor cultivation and stewardship events inspiring, memorable and achieve great attendance. We will look at how to plan events that effectively engage, cultivate, and steward legacy prospects, professional advisors, auxiliary members and volunteers. Together we will examine specific event examples: event components, audience development techniques and outcomes. By the end of this workshop you will be able to come away with an enthusiastic approach to planning, executing and evaluating cultivation and stewardship events to assist you in meeting your planned giving goals.

Workshop Presenter



Donna M. Bandelloni joined the California Pacific Medical Center Foundation in San Francisco as Director of Gift Planning in November 2013. California Pacific Medical Center is one of the largest private, not-for-profit, academic medical centers in California and is a Sutter Health affiliate. There she will lead the effort in creating legacies of support by working with donors and the professional advisor community. Prior to this role Donna spent almost the last seven years at Lucile Packard Foundation for Children's Health. There she fundraised for the Lucile Packard Children's Hospital and the Department of Pediatrics at the Stanford University School of Medicine. As Director, she led the Gift Planning program, creating hundreds of legacy gifts through her

work with donors and their advisors.

For over 20 years Donna has worked with planned giving programs from both sides of the fence: for profit and not for profit. She has worked with high net worth individuals and the philanthropies they support throughout the Bay Area. Prior to joining Packard, Donna was a Vice President and Senior Philanthropic Consultant for Mellon Bank, covering the Western United States for Institutional Trust and Investment Management Services supporting planned giving programs. From 2000-2002 She was the Director of Advisory Services for the San Francisco Foundation where she worked with professional advisors and their clients to foster philanthropic giving for the Community Foundation. Prior to this Ms. Bandelloni was recruited to help build philanthropic programs and services nationally with Merrill Lynch's Trust Company in Princeton, NJ. As Senior Philanthropic Consultant for Merrill Lynch, Donna worked with Wealth Advisors and their clients to identify and implement a variety of philanthropic strategies to achieve their financial and charitable giving goals. In addition she worked with hundreds of nonprofit clients to establish and grow planned giving programs.

Upon relocating from the East Coast in 1989, Donna joined Wells Fargo Bank as a Vice President and served in the Savings and Investment Group as a Retirement Specialist, as well as the Charitable Management Group where she offered investment management and trust services for planned giving programs to nonprofit clients statewide.

Donna has been a Board Member of the Northern California Planned Giving Council (NCPGC), member of both the Partnership for Philanthropic Planning and the former National Conference on Planned Giving. She has presented at local NCPGC Conferences, the Western Regional Planned Giving Conference, Stanford Charitable Giving Conference, Wine Country Chapter, and has given many local and national presentations on planned giving. She holds a Bachelor of Science and a Master's in Education from the University of Connecticut.

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Mounting Successful Planned Giving Cultivation
& Stewardship Events

April 29, 2015
Northern California Planned Giving Council

Presenter



Donna Bandelloni
Director of Gift Planning
California Pacific Medical Center Foundation



Today's Agenda

- Strategies to make donor cultivation & stewardship events inspiring, memorable & well attended
- How to plan events that effectively engage, cultivate and steward legacy prospects, professional advisors, auxiliary members and volunteers
- How to effectively involve volunteers to help steward planned gifts
- Specific event examples: event components, photos, audience development techniques and outcomes

What makes successful stewardship & cultivation events?

- Meaningful donor engagement opportunities using creative event elements
- Targeted outreach activities to multiple audiences
- Mission driven & donor focused messaging
- Deepen relationships
- Diversify donor giving



Examples of Successful Planned Giving Cultivation & Stewardship Events

CPMC's Circles of Caring

Legacy Society

Spring Tea and Physician Presentation

- Donor centered and mission oriented messaging
- Legacy Donors
- Loyal Prospects



CPMC's Circle of Caring *Legacy Society*

Event Outcomes

- Donor engagement
- Reinforces our mission
- Validates the importance of legacy gifts
- Creates a sense of donor community



CPMC's Retired Physician's Luncheon *(Spring and Fall)*

- Strengthen Ties for MDs and Spouses with CPMC
- Hear Latest Trends in Healthcare and Up to Date News
- Recognition and Appreciation for their Contributions
- Reinforce Legacy Message



Lucile Packard Foundation for Children's Health **One Common Thread**

- Luncheon celebrating LPCH's 20th anniversary
- Recognizing donors and volunteers for giving their time, talent, and treasure
- Integrated / multi-disciplinary event
- Carefully chosen speakers



Lucile Packard Foundation
Retirement Community Events

- Hospital tour with presentation and lunch
- Identifying and engaging new donors/prospects
- Steward current donors
- Participants poised to spread message to their community (church, retirement home, etc)



We've come this far because of people who have cared - volunteers, staff, physicians, nurses, donors... and we'll make our dream a reality only with more of the same kind of support.
- Lucile Salter Packard

Lucile Packard Foundation
Lucile Salter Packard Society (LSPS)

Holiday Tea

- Stewardship event honoring society members
- Meaningful venue – a legacy of Packard's Allied Arts Auxiliary

Summer Event

- Broader audience includes prospects, major donors, advisors, volunteers
- Cocktails, hors d'oeuvres, and presentations
- Interdisciplinary effort



Lucile Salter Packard Society

Lucile Packard Foundation
Professional Advisors Breakfast

- Annual educational/networking event
- Spotlights Packard's unique people and programs
- Presentation on estate planning or related issues
- Attracts new professionals for engagement
- Generates interest in touring the Hospital



After the Event

- Keep up the momentum!
- Follow up with prospects, donors, etc.
- Send your guests a thank you card
 - Include photos from the event
 - Remember those who RSVP'd but couldn't come



Building on Success... what we've learned

- Know your guests
 - What time is the event? Where is it?
- Educate your guests
 - Donors
 - Professional advisors
- Choose your stories wisely
 - The power of planned giving is its accessibility to all, so profile someone others can relate to

Questions?

Thank you for attending!

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