



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 4: 3:45 pm – 5:00 pm**

## Topic:

**Behavior-Based Planned Giving  
Marketing for Fun and Profit**

## Presented by:

**Douglas Ismail  
Emily Limón**

## Workshop Summary:

This session will give you a refresher on the underlying differences between marketing and sales, and we'll complete an exercise on identifying the right messages for the right audiences for your organization. By the end of the workshop, you'll be better prepared to design a media strategy that will reach the right audience in the right way, with the right message.

## Workshop Presenter



**Doug Ismail** serves as executive vice president of the California Masonic Foundation, a \$30 million public charity that supports programs and scholarships that create educational access opportunities for underresourced youth. He is also the chief philanthropy officer for the Masons of California. His achievements include developing the organization's first gift annuity program, creating a planned gift recognition society, and restructuring the annual fund. Throughout his tenure, the organization has received more than \$250 million in current and planned gifts.

Doug's 30-year career in nonprofit fundraising began in public radio in Cleveland and has included nearly every sector of the business since. He spent three years as a campaign counsel in the late 1990s before moving to San Francisco by way of Eugene, Oregon in 2002.

He holds a bachelor's degree in classical studies from Hiram College in Ohio, as well as a master's degree in higher educational administration from Ohio State University.

### **Douglas Ismail**

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## Workshop Presenter



**Emily Limón**, as director of communications, oversees the strategic and creative direction of the Masons of California brand and marketing messages across all communication platforms, including online and mobile applications, print, publications, outdoor, and direct mail.

Emily began her career in the financial industry, marketing mutual funds and retirement plans to individuals and corporations, through mostly digital channels. After working in the financial industry for seven years, she made the leap to non-profit arts administration, where she was responsible for \$22 million annually in ticket sales and marketing for the San Francisco Symphony.

Emily has a bachelor's degree in modern literature from the University of California at Santa Cruz, where she managed the first online arts calendar for the University's Arts & Lectures program.

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## Planned Gifts for Fun and Profit...

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Emily Limon & Doug Ismail

## Introductions -

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- Who we are
- Who you are

## Presentation Overview

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- Marketing vs. Sales –
- Traditional Methods Can Work, But...
- Impress Your Boss 101
- Final Exercise: Pulling it all Together...

## Planned Giving: Traditional Methods

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- Spray and Pray Mailings
- Referrals from the Field:
  - Staff
  - Boards and Volunteer Groups
  - Can you “Make your own dumb luck?”
- Chasing after Rich People...
- Your Brilliant Web Site

Or, you can think like a  
Marketer...

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- What are my first questions?

## 4 (Simple) Questions

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- QUESTION 1: Who?
- QUESTION 2: What?
- QUESTION 3: Why?
- QUESTION 4: When/Where?

## **Planned Giving... Marketing?**

- Does Planned Giving really need marketing?

## **Planned Giving... Marketing?**

- What are the main differences between marketing and sales in planned giving?

## **Planned Giving... Marketing?**

- It's all about answering the question:  
How do I best connect with my prospects?

## **Marketing is Not Sales**

- Marketing has two underlying principals:
  - Understanding your prospects, and
  - Aligning your communication strategy to them.
- Sales is persuading the prospect to act, and closing the deal.
  - Most fundraisers think "sales."



## Marketing vs. Sales

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- So... Where has your emphasis been?

## Question 1: WHO?

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- Demographics: Consider the quantitative facts about your donors and prospects:
  - Gender/Age/Geography
  - Occupation/Income/Home Owner
  - Education level/Marital status/Children?
- Psychographics: What are they like? What are their lifestyles? What are their attitudes, values, behaviors?
  - What magazines do they read/movies do they see/music do they listen to?
  - How do they spend their free time?
  - Where do they go on vacation?
  - What do they care about?

## Question 2: WHAT?

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- What do they care about?
  - What is their connection to your organization?
  - How long have they been connected?
  - How frequently do they connect?
  - How deeply do they connect?
  
- What is their *charitable* connection to your organization?
  - To what have they been giving/volunteering/buying?
  - How long have they been giving/volunteering/buying?
  - How frequently have they giving/volunteered/bought?
  - How much do they give?

## Question 3: WHY?

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### THIS IS THE BIG QUESTION

- Why** should your donors give to your organization?
  - What are the benefits for these donors? (Not simply how will it make them feel?)
  - Who/what else will benefit from their gifts?
  - What will happen if they don't give?

## Question 4: WHEN & WHERE?

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- When** should these messages be communicated?
  - What time of year is appropriate?
  - How frequently is appropriate?
  - What outside opportunities are there? (Life changes like retirement, buying a house, having a child/grandchild, tax season?)
  
- Where** should these messages be communicated?
  - Direct mail/email?
  - Online? If so, which sites would be best?
  - Print? If so, which periodicals would be best?
  - TV, Radio, Billboards? If so, which ones?
  - Other opportunities?

## GROUP EXERCISE

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Reminder...

- QUESTION 1: WHO?
- QUESTION 2: WHAT?
- QUESTION 3: WHY?
- QUESTION 4: WHEN/WHERE?

## Group Exercise

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- Imagine you are at a planned giving prospect and donor reception... in 2020.
  - Who do you see?
  - How do they get their information?
  - Are you reaching them?

## Group Exercise

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- Grab Your Sheet:
  - Who? Write it down in square #1

## Group Exercise

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- Grab Your Sheet:
  - What? Write it down in square #2

## Group Exercise

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- Grab Your Sheet:
  - Why? Write it down in square #3

## Group Exercise

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- Grab Your Sheet:
  - When & Where? Write it down in square #4
  - This is your plan...

## Final Thoughts and Questions

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- This is a highly competitive field
- Invest wisely
- Don't be afraid to be creative
- There is plenty of room for smart, scrappy marketing