

## The 2021 COMMUNICATION AND DEVELOPMENT PLANNING DOCUMENT

**Purpose:** *This is a detailed document to support the Strategic Plan/Logic Model adopted 12-8-2020. Development and Appreciation Committee will lead review and monitoring of the work objectives presented herein. This is recognized to be a high-level goal document and not expected to be fully completed. It too is to be used in a fluid manner to adapt to needs and opportunities that come forth for the organization. Updates will be reviewed and presented in D&A Committee with alignment to other committees and progress reporting at Board Meetings.*

**2021 Goal:** Inspire gifts and raise money – \$1,000,000+

**Overall Communications Messaging:** Value Messaging – value of the Foundation for the audience based on their demographics and psychographics and communicated where and in the format most likely to reach them.

### KEY AUDIENCES

#### EXTERNAL GROUPS

##### 1. General Public

- a. Value messaging, system news and events, IRS news, KACF news, giving options
- b. Communications
  - i. Website
  - ii. Social Media
  - iii. Public Presentations (Clubs, Groups)

##### 2. Financial Advisors/Accountants

- a. Maintain and enhance our existing relationships with independent and primary investment managers as well as accountants.
- b. This will be the primary responsibility of the affiliate foundations to reach out and develop relationships using a toolkit and plan produced by the host Foundation.

##### 3. Funeral Home Directors

- a. Toolkit customizable materials are ready.
  - i. Assist at least 4 Affiliates with outreach and implementation.
    1. TBD
    2. TBD
    3. TBD
    4. TBD

##### 4. Farmers

- a. The Toolkit customizable materials are ready. Assist with at least 6 Affiliates with outreach and implementation of materials.
  1. TBD
  2. TBD
  3. TBD
  4. TBD
  5. TBD
  6. TBD

## **5. Community Chambers**

- a. This will be the primary responsibility of the affiliate foundations to reach out and develop relationships using a toolkit and plan produced by the host Foundation.
  - i. Develop Plan by May 2021

## **6. Charity Development Officers – focusing on area colleges in year 1 – NEW**

- a. Value Messaging
  - i. *CKCF provides flexibility for donors in their planned giving. We are currently working with your donors to fulfill their charitable wishes with planned gifts to several charitable organizations, including yours, in their lifetimes. If we work together, we can ensure that your donors' wishes to give to other charities is honored in the planning process, along with your college. Our relationship is a win-win relationship. We can refer them to you, and you can help them fulfill their additional charitable goals by referring them to us. Let's work together to make our community as a whole, better!*
- b. Communications – Establish Timeline when Marketing Associate Hired.
  - i. Email
  - ii. Local meeting of regional college development officers
  - iii. Leave-behind
  - iv. Later mailing as a reminder

## **7. Nonprofit Organizations – boards, directors and development staff – Grants, Development**

- a. Target expansion of 5 new funds for charities – Designated or Agency.
- b. Messaging
  - i. Partnership for raising money to serve their mission! *Together, we can ensure that the most vulnerable will be cared for. We raise money with you! We make connections! We provide planned giving services.*
  - ii. We are a resource for all sorts of things operationally – not limited to things like policies, etc.
  - iii. Availability of grants and leverage resources and/or letters of support.
- c. Communications
  - i. E-mailing
  - ii. Website – keep updating charity resource guide and promoting it through e-mail
  - iii. Regional org meetings (Michelle schedule a gathering for charities)
  - iv. Individual meetings with charities –
    - 1. First with those we management funds for – what else can we do.
    - 2. Solicit other organizations
  - v. Charity section of toolkit for affiliates to use to build relationships. Develop by June 2021

## **INTERNAL SPECIALTY GROUPS**

### **8. Affiliate Boards of Directors (this is a very limited, simple list)**

- a. Messaging
  - i. THANK YOU for your service
  - ii. How we serve them – WE ARE HERE FOR YOU! (always)

- iii. News from CKCF
- iv. We can help you be a better and more effective board!
- v. Foundant/CSuites is changing our functionality and management of funds and resources.

b. Communications

- i. Welcome and appreciation letter from Jennifer CKCF Board at start of term
- ii. Monthly Building Communities, Monthly Regional Conversation hosted by Angie Tatro – 2<sup>nd</sup> Friday at Noon via Zoom
- iii. Becky/Liaison meeting attendance messaging (how can we track)
- iv. Educational forum – summit learning event – September 23 tentative date for summit
- v. Website – videos and educational resources incorporate into toolkit and newsletter releases
- vi. Regional Foundant training for learning Affiliate portal and functionality

**9. Fund Contacts**

a. Messaging

- i. Reporting – our value to the family, the generations responsible for managing the fund. (Management, investments, stewardship to existing generations of donors)
- ii. Grow your Giving/Fund. Carry on the legacy of your loved one. Continue to grow your own legacy through charitable giving to your fund.
- iii. Thank you for partnering with us and giving attention to your fund and the charities of your loved ones. Thank you for your hard work in carrying on their legacy. It makes a difference.
- iv. Foundant is changing our lives! Build on partnership with our regional service area and state of Kansas.

b. Communications

- i. Email – primary!!
- ii. One Mailing – a soft touch/card for “grow your fund” or the “thank you” – set a date
- iii. Foundant training – what would this look like?

**10. Testamentary Donors**

a. Target establishing 6 new planned gifts in 2021

- 1. TBD
- 2. TBD
- 3. TBD
- 4. TBD
- 5. TBD
- 6. TBD

b. Messaging

- i. *Thank you – we are grateful for your trust in us. Leaving your financial legacy to the Foundation is both a gift and a sacrifice to your family. We are honored you have chosen us.*
- ii. Establish design of Visionary Society in 2021

- iii. Reporting - Value message – we are stewarding your future gift by doing this...  
UPDATES of what is happening in the Foundation – we are vibrant!
- iv. The value of lifetime giving in addition to legacy giving.

- c. Communications
  - i. E-mail – newsletter and infrequent updates – annual reporting?
  - ii. Soft touch mailing to our donors – Lifetime giving
  - iii. Inaugural Visionary Society event

**Top Ten Prospects in 2020 for planned testamentary giving – IDENTIFY ACROSS SERVICE AREA for the purpose of raising money in those communities or for the Foundation. These may already be identified. Identify brand advocates – connect these donors with someone who has been through the process that would be willing to encourage them.**

- a. Messaging
  - i. Identify their passions
  - ii. We are the ones you want to choose – flexibility in giving to multiple charities, forever investment, employ all of our value messaging, pull out stories of how people like them have given, give them giving options, give now, give later
- b. Communications
  - i. Personal Face-to-Face meetings
  - ii. Mailing
- c.

### **11. New Donors in 2020**

- a. Messaging
  - i. Examine manner CSuite can identify new givers in 2020
  - ii. *Welcome to our giving family! And thank you!*
  - iii. *Grow your giving - whether big or small, your gift to the Foundation illustrates trust in our mission.*
  - iv. Learn more about us
  - v. Ways of giving
- b. Communications
  - i. Soft touch mailing to donors

### **12. Donors**

- a. Messaging
  - i. Thank you
- b. Communications
  - i. Mailed thank you to each donor –\$500? \$1,000? – Committee member take on?  
Who: \_\_\_\_\_

### **13. School Contacts - Scholarships**

- a. Messaging
  - i. Largely logistical
  - ii. THANK YOU for facilitating our scholarship in your school! You are an important

- link in the chain of funding for our future!
- iii. Ask for feedback on what works/doesn't?
- b. Communications
  - i. E-mail
  - ii. Hand-written thank you note to counselors at the end of the season?

#### **14. Parents and Recipients - Scholarships**

- a. Messaging
  - i. Strategically identify recipients that should be graduated, seek testimonials and educate them and parents of the foundation and its impact on their student and others (pay it forward)
  - ii. Congratulations! and logistical and appreciation for donor
  - iii. Learn more about the Foundation and the donor to your scholarship fund
  - iv. Inspired by your child's gift for their education? Learn more about the foundation. Join a review team or contribute back to the fund that gave to your child's education. (not likely, but maybe we will plant a seed for the future???)
- b. Communications
  - i. Do we have their e-mail addresses? Do we know their parents? Kristie help lead.

#### **15. Review Teams/Volunteers – Scholarships and Grant**

- a. Moving review committee participants to donors
  - i. Evaluate reviewers against donor lists past 2 years
  - ii. Based on results incorporate below:
- b. Messaging
  - i. Largely logistical – welcome, thank you and here is your job
  - ii. Thank you – you are giving a priceless gift to your community through grants and to our youth (communities) through scholarships.
  - iii. Love what we/you are doing? Consider joining our donor family!
- c. Communications
  - i. Initial e-mail letter with follow up through grant/scholarship review
  - ii. E-mail the above messages at the end of the year

#### **16. Grant Recipients**

- a. Messaging
  - i. Congratulations
  - ii. *Because of a generous donor, you are receiving this grant!*
  - iii. *Establish a fund with the Foundation to continue your great work!*
  - iv. Encourage your donors interested in endowment to give to an endowment that will provide support to your organization EVERY year.
- b. Communications
  - i. Largely from Michelle

#### **17. Businesses/Sponsors**

- a. Message
  - i. Legacy Leaders – design program for sponsorship support for our region
    1. Possibly figure out a shared split for their gift - % to CKCF and % to affiliate to avoid competition and build on this annual campaign of

## business support

### b. Communication

- i. Letter!
- ii. Personal Calls
- iii. A sticker they can put in their windows as a supporter of the Foundation. "We are a building block to a stronger community. We gave to the Foundation."

### 18. Current Board Members

- a. Provide some resources for providing recognition of board service
- b. CKCF work toward a build out of staff and board photos and bios for website
- c. support media release throughout region on new members – build on photo library and biographies

### 19. Top 100 Prospects of All TIME

- Past Board Members
  - i. Build out tracking in CSuites
- Loyal Donors – needs defined
- Former Directors
  - ii. Message (?) What is the value to our donors?
    1. *CKCF needs to subsidize our operations with private donations – we need financial support to do a good job for you and the communities you wish to serve through your donation.*
    2. *Extend your trust in us, help us be strong and confident in facilitating and stewarding your gifts to your chosen vulnerable communities.*
    3. *An operational gift to us is a yearly insurance policy for your donation or your fund. It ensures that we can give it the greatest attention and steward it for future generations.*
  - iii. Communications
    1. Web recognition
    2. Some sort of swag?
    3. Personal thank you note for each gift to the CKCF – a separate card