

2024 Donor Advisors Engagement Plan

Objective

- Enhance engagement Donor Advised Fund Advisors to encourage increased granting activity, donations, and explore additional philanthropic partnership opportunities.

Target Audience:

- Donors with Donor Advised Funds at the Community Foundation for Southeast Michigan

Theme

- Navigating Your Philanthropic Journey Together

Overview:

- The "Navigating Your Philanthropic Journey Together" campaign aims to improve partnerships with donor advisors, emphasizing the positive change they are creating with their fund. Together, the Community Foundation and DAF advisors can propel meaningful and lasting change in their southeast Michigan.

Key Messages:

These can be used as themes for various communications (monthly news, etc)

- **Discover Your Philanthropic Potential:**
 - Encourage DAF holders to recognize and leverage the full potential of their donor-advised funds for making a lasting impact in the community.
- **Collaborative Philanthropy, Amplified Impact:**
 - Emphasize the strength of collective giving and collaborative efforts, showcasing how working together with the Community Foundation amplifies the impact of individual contributions.
- **Navigate Your Philanthropic Journey with Expert Guidance:**
 - Highlight the advisory services offered by the Community Foundation, emphasizing the personalized guidance available to help DAF holders navigate their philanthropic journeys more effectively.
- **Transformative Giving, Transformative Communities:**
 - Convey the idea that every grant recommended from a DAF has the potential to be a catalyst for positive change, contributing to the transformation of local communities.
- **Explore New Frontiers in Philanthropy:**

- Inspire DAF holders to step beyond traditional giving models and explore innovative approaches to philanthropy, whether through strategic partnerships, collaborative projects, or novel grant-making strategies.
- **Celebrate Your Philanthropic Legacy:**
 - Invite DAF holders to reflect on the lasting legacy they can create through strategic and impactful philanthropy, leaving a positive mark on the community for generations to come.
- **Your Fund, Your Voice:**
 - Empower DAF holders to express their unique philanthropic visions, emphasizing that their donor-advised fund is a tool for them to shape and articulate their values through charitable giving.
- **Philanthropy with Purpose:**
 - Reinforce the idea that every philanthropic decision made through a DAF is an intentional step towards creating a purpose-driven legacy and contributing to the greater good.
- **Building Bridges, Creating Change:**
 - Convey the message that by partnering with the Community Foundation, DAF holders are not just contributing funds but actively building bridges between needs and solutions, fostering positive and sustainable change in the community.

Campaign Components and Tactics:

- **Personalized Communications:**
 - Regularly communicate with DAF Advisors through personalized emails and newsletters
 - Create automated emails based on their relationship with the Community Foundation (birthdays, anniversaries, etc.)
 - Share success stories of impactful grants made by DAF Advisors
- **DAF-Specific Workshops and Webinars**
 - Host educational workshops/webinars on effective grant-making, strategic philanthropy, and maximizing the impact of DAFs.
 - Include case studies and examples highlighting successful DAF grants.
- **Philanthropic Advisory Services**
 - Showcase our personalized advisory services to help DAF Advisors identify and pursue philanthropic goals.
 - Create a "worksheet" or "family retreat" materials to help donors clarify their goals.

- Provide guidance on strategic grant-making, identifying impactful projects and potential partnership opportunities.
 - Share latest trends in philanthropy and current needs of the region and local organizations including CFSEM endowed field of interest funds.
- Create Meeting links to talk about your DAF with a Philanthropic Advisor
- **Donor Advised Fund Materials/Collateral**
 - Create digital and print materials with information on donor advised funds such as downloads, brochures, and automated emails.
 - New DAF Advisor Onboarding Email Series
 - Donor Advised Fund Resources Page Created

Campaign Ask:

- Together, let's elevate the impact of your philanthropy and leave a lasting legacy. Whether it's supporting a cause close to your heart or exploring new ideas in giving, we can transform your inspiration into impact. Thank you for being a valued part of our philanthropic community.

Call to Action:

- "Be a visionary philanthropist. Join us in creating lasting change with your Donor Advised Fund at the Community Foundation. Together, we can shape a better future and make significant, long-term impact in southeast Michigan."

KPIs (Key Performance Indicators):

- **Website:**
 - Monthly website traffic to donor services pages
 - Average time spent on the website
 - Downloads
 - Meeting Requests
- **Email Marketing:**
 - Open rates
 - Click-through rates
 - Subscribe rates
- **Webinars and Workshops:**
 - Attendance rates
 - Participant engagement (questions, polls)
 - Post-event survey feedback

Metrics of Success:

- Increase the engagement rate of DAF Advisors
 - New Donations
 - New Fields
 - Donations to CFSEM Endowed Funds
- Updated email and contact info for our Donor Advisors and preferences
- DAF Advisors moved to new portal