

Developing a Planned Giving Marketing Plan

Brochures, mailings, the Internet...all techniques you use to market your planned giving program. But what about those qualified prospects who stay just below your radar? Are you proactively identifying planned giving prospects from analyzing annual giving behaviors; using wealth and planned giving scoring models; and using segmentation strategies? In this session, you will learn how to develop an integrated planned giving marketing plan that will help you increase gift income and improve your overall program performance.

Target Audience

Mid-level (3 to 6 years) and senior level (7 to 9 years)

About the Presenter

Timothy D. Logan, ACFRE is Vice President and Senior Consultant of Planned Giving Services and Nonprofit Healthcare Services for RuffaloCODY. Tim has worked in both the for-profit and nonprofit sectors and has over 29 years' experience in fund raising, nonprofit management and direct response marketing. In addition to holding the ACFRE credential, he holds a Masters of Nonprofit Management (MNO) degree. Tim's background in the nonprofit sector includes 17 years' experience at the local and national levels. Tim has been a local Executive Director for the Muscular Dystrophy Association, in Harrisburg, PA and for the Leukemia Society of America in Cleveland, OH. Nationally, he was a fund raising consultant for American Diabetes Association and the American Heart Association. He has served as Director of Development Services with Epilepsy Foundation was Director of Individual Giving at USO World Headquarters, and most recently served as the Senior Director of Development for the National Osteoporosis Foundation. His 14 years of Planned Giving experience includes working with advisors, developing donor relationships, and designing effective planned gift marketing and communication strategies. Tim has also spent 12 years as a direct response fund raising consultant. In addition to managing multi-million dollar direct response programs, he has been a leader in developing innovative direct response programs targeted to major and planned giving donors. Tim is past president of the Mandel Center Alumni Association at Case Western Reserve University. He is a past board member of AFP, Greater DC chapter, and a past member of the AFP National Professional Education committee. Tim is a member of the National Capital Gift Planning Council in Washington, DC. He is active in the Direct Marketing Association Nonprofit Council. An AFP certified instructor, he is a seasoned lecturer and author on fundraising and nonprofit management.

