



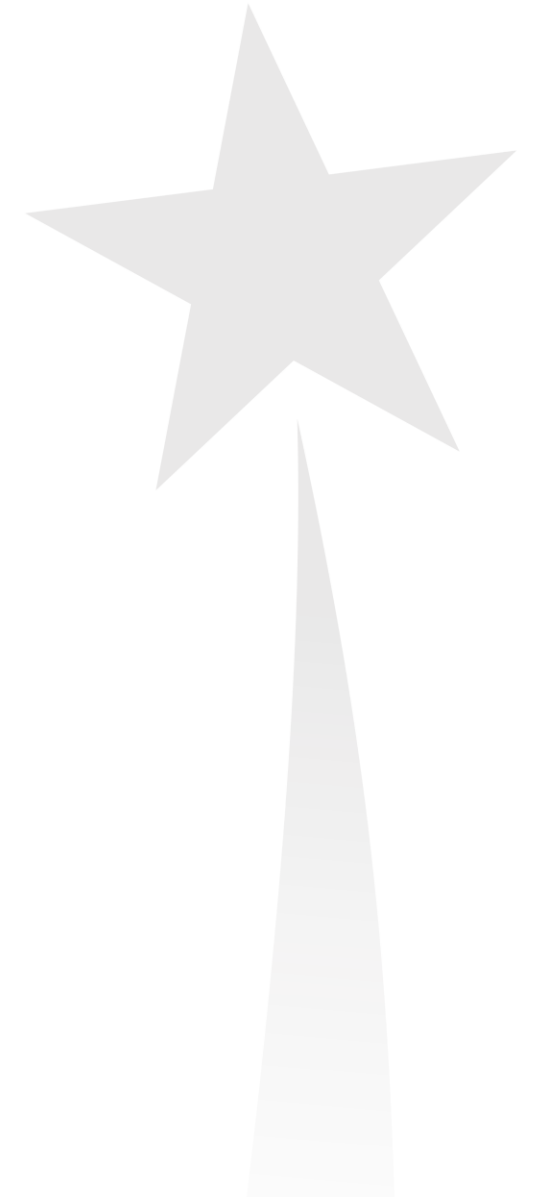
CF Estate Gift Mini Campaign

POWERED BY
 BOWERCOMM



Lori Bower

President.
Chief Strategist.
Creative Director.



★ A Few Friends





No one knows
who we are

We need more
estate gifts



What am I going to post?



Only 10
people saw
it???

★ Today's Question

**How do we
convince Doug
and Mary to leave
an estate gift?**



- What's the best way to reach people?
- What messages should we run?
- Video, photo, reel?
- What's the right budget?



★ What is a Mini Campaign?

One specific
target
audience

One specific
offer/objective

Short
timeframe

This structure can be used for any topic

★ What is a Mini Campaign?

Community-
minded adults
age 55+

One specific
target
audience

Drive
understanding
and inquiries for
estate gifts

One specific
offer/objective

30-45 days

Short
timeframe

★ The recipe

Who (Audience)	Community-minded adults age 55+
How (Messages)	<ul style="list-style-type: none">• Aha/pain point• How your CF helps• Testimonial
What (Materials)	<ul style="list-style-type: none">• Video(s)• Social graphics and posts• Emails• Web page / form
Where (Channels)	<ul style="list-style-type: none">• Email• Paid Meta (Facebook/Instagram)• Bonus: YouTube, Newspaper, Streaming, Radio

★ This is mile 1 in a marathon

- This is 90% about awareness/understanding and 10% about action
- Repeat exact campaign on a regular basis (2x/year)
- Handful of good leads in short-term (at best)
- Could take years for people to raise their hands
- You miss 100% of the shots you don't take





Who and How

★ What will touch their hearts?



AUDIENCE NAME: **PROSPECTIVE DONORS**



Doug & Mary

68

Retired Teachers

What is their desire? What are they looking to accomplish?

A way to give back to the community that will make a difference

What do they value?

- Education, social services, and early childhood
- Local ties
- Impact for generations
- Cost-effective
- Secure

What problem are they facing? What's getting in their way?

- Cost of redoing estate plan
- Complacency
- Want to give back but aren't sure how
- Internal conflict about children's share of inheritance

Frustrations / Barriers

- Constantly asked for money by various organizations
- Community organizations appear ineffective
- Lack of awareness of CF
- Size of fund required for grants to begin
- Perception that you need a lot of money to be philanthropic
- Perception of high management fees

CURRENT

Fears

- Getting involved in something that will be a huge time commitment but go nowhere
- Losing control over intentions with their donations
- Money being spent unwisely by recipient organizations
- Uncertainty over the best way to proceed
- Talking about death
- Backlash from children

Wants / Motivators

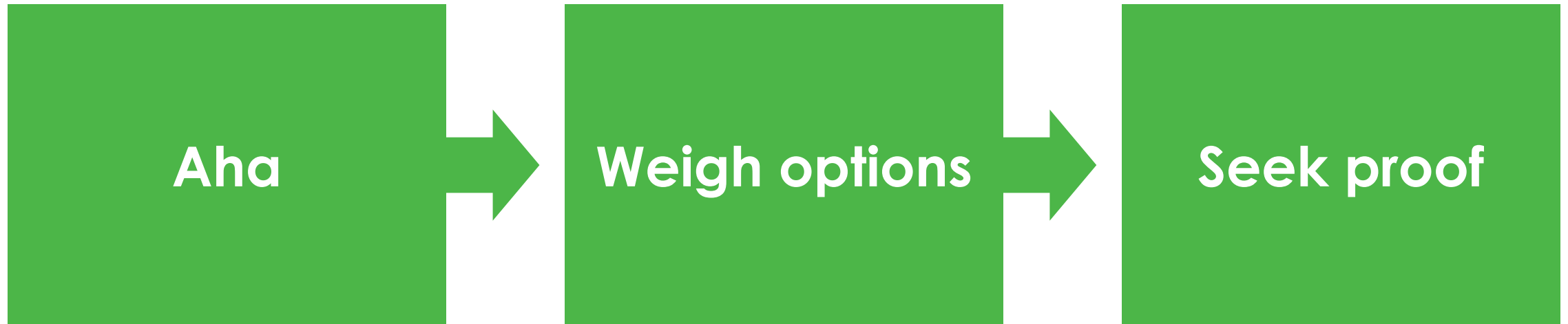
- Desire to give back to the community
- Seeing that someone they know (or someone like them) is doing it
- Counsel from a professional advisor
- A change in family status or a routine review of estate plans
- A particular project of interest
- Sense of accomplishment and pride in doing volunteer or charitable work

FUTURE

Aspirations

- To live in a community that is thriving
- To feel good about doing their part
- To be recognized for contributions, of time, money and talents
- To have a community that will be thriving when their grandchildren are grown and beyond

★ Decision Journey



★ Message across the journey



★ Kinds of pain points

Financial

Efficiency

Emotional

Process

Finding the pain

- * I want you to help me discover some of the pain points of people who are considering designating a charitable gift in their estate plans to help improve the community they live in after they're gone.
- * First, I would like you to come up with a list of 10-20 expressive, emotional and evocative words that you can use to describe their emotional pain. I will let you know if the list is good and when to move on.
- * Next I would like you to ask me questions about the people and the niche so that we can really get to the pain points they are experiencing. I will answer these questions to give you more context and information to create the pain points in the next step.
- * The last step, I would like you to start giving me an output of 10 pain points written in "I" statements that begin with "I" and include words that you came up with from our expressive emotional word list. Please write these statements with no more than 15 words.
- * Do you understand the process?



Yes, I understand the process. Let's start with the first step. Here is a list of expressive, emotional, and evocative words that can be used to describe the emotional pain experienced by people considering designating a charitable gift in their estate plans:

1. Overwhelmed
2. Uncertain
3. Anxious
4. Hesitant
5. Doubtful
6. Hopeful
7. Frustrated
8. Inspired
9. Conflicted
10. Vulnerable
11. Fearful
12. Burdened
13. Guilty
14. Resolute
15. Nostalgic





Great! Let's move on to the next step. To better understand the people considering designating a charitable gift in their estate plans, I'd like to ask you a few questions. Your answers will help us identify specific pain points more accurately.

1. **Demographics:** Can you describe the typical age range, financial status, or any other demographic details of the people considering these charitable gifts?
2. **Motivations:** What are the primary motivations behind their decision to consider a charitable gift in their estate plans? Are they looking to leave a legacy, support a cause close to their heart, or something else?
3. **Concerns:** What are their biggest concerns or fears about making such a decision? Are they worried about the impact on their family's inheritance, the effectiveness of their donation, or legal complexities?
4. **Previous Experience:** Have they had any prior experience with charitable giving or estate planning that might influence their current considerations?
5. **Knowledge and Understanding:** How knowledgeable do they feel about the process of designating a charitable gift in their estate plans? Are they seeking more information or guidance?
6. **Community Connection:** How strong is their connection to the community they wish to help? Is their desire to contribute based on personal experiences, a sense of duty, or something else?
7. **Perceived Barriers:** What do they see as the biggest barriers to finalizing such a decision? Is it a lack of trustworthy information, difficulties in choosing a charity, or concerns about family reactions?

Your responses to these questions will provide valuable context that we can use to create accurate and empathetic pain points.

Demographics - usually 55+ couples or individuals who have moderate to high wealth. They are also people who have never been married and have no heirs but care about their community.

Motivations - They feel their community has been good to them, and they want to give back. They also see great potential in their community and want to be part of creating a wonderful future quality of life for their children, grandchildren, and future generations who will live there. They may also want to leave a personal legacy or support a cause close to their heart.

Concerns -- They are worried about the impact on their family's inheritance, and they are worried that their money may run out if they live a long time or require long-term expensive medical care. They are worried that their children may feel slighted.

Previous experience -- They likely have a will, and they may have an estate plan that was drafted earlier in life. However, they likely haven't updated their estate plans since their children are grown or since they amassed more wealth.

Community Connection -- They are very tied emotionally to their community and wish to see good things happen.

Knowledge and Understanding -- They do not know how to designate a charitable gift in their estate plans. They may be familiar with their local community foundation, but they are not aware of the benefits of leaving an estate gift(s) through a community foundation and how that would compare to a private foundation or giving directly to charities of their choice. They also don't know much about unrestricted endowments and how they benefit both donor and community.

Barriers -- The biggest barrier is complacency. They know they should update their plans, but there is nothing pressing to do it right now. It is also an extra legal cost to do so.



Thank you for providing the additional context. Based on the information provided, here are 10 pain points expressed in "I" statements incorporating the words from our expressive emotional word list:

1. "I'm overwhelmed by the thought of **updating my estate plan; it feels unnecessary and costly.**"
2. "I feel uncertain about whether my **contribution will have the lasting impact** I desire for my community."
3. "I'm **anxious that my children might feel slighted or unappreciated** if I leave a portion of my estate to charity."
4. "I'm hesitant to take action because I worry my **resources may not last**, especially with potential medical costs."
5. "I feel doubtful about how to properly execute my charitable intentions without **causing family conflict.**"
6. "I am hopeful but **confused about the benefits of an unrestricted endowment** for my community."
7. "I'm frustrated by **not knowing how to start the conversation with a foundation** that aligns with my values."
8. "I feel conflicted; I want to give back yet fear my **children will see it as losing their full inheritance.**"
9. "I'm burdened with the responsibility to support my community while **ensuring my own financial security.**"
10. "I'm concerned that without updating my estate plan, my **aspiration to help future generations might not be realized.**"

Let me know if these statements resonate with the audience you're describing, or if we need to refine them further.

"I want to leave charity in my will, but I don't know the best way to do it."

True or False

Changing the charitable gifts in your estate plan requires an attorney.

"Will my children want for anything if I leave a portion of my estate to charity?"

"Will my children feel slighted if I leave a portion of my estate to charity?"

True or False

Only rich people give money to charity through their wills.

Give or save?

Eternal question.

★ 1% Click-Thru Rate (CTR) = “Gold Coin”

Ad	Impressions	CPM (cost per 1,000 impressions)	Link clicks	CPC (cost per link click)	CTR (link click-through rate) ↓
tile_leave-charity_s	458	\$8.93	12	\$0.34	2.62%
tile_requires-attorney_s	408	\$10.10	6	\$0.69	1.47%
tile_will-my-children-want_s	410	\$9.98	5	\$0.82	1.22%
tile_children-feel-slighted_s	408	\$10.56	4	\$1.08	0.98%
tile_only-rich-people_s View charts Edit Duplicate Pin	448	\$9.04	3	\$1.35	0.67%
tile_give-or-save_s	402	\$7.29	2	\$1.47	0.50%
Results from 6 ads	2,534 Total	\$9.31 Per 1,000 Impressions	32 Total	\$0.74 Per Action	1.26% Per Impressions

"I want to leave charity in my will, but I don't know the best way to do it."

2.62% CTR

True or False

Changing the charitable gifts in your estate plan requires an attorney.

1.47% CTR

"Will my children want for anything if I leave a portion of my estate to charity?"

1.22% CTR

"Will my children feel slighted if I leave a portion of my estate to charity?"

0.98% CTR

True or False

Only rich people give money to charity through their wills.

0.67% CTR

Give or save?

Eternal question.

0.50% CTR

★ Other pains/aha's we've run

IF YOU'RE LOOKING FOR
A SIGN TO GET YOUR
ESTATE PLAN DONE


THIS IS IT



COBB COMMUNITY
FOUNDATION


**WHAT HAPPENS TO YOUR
MONEY AFTER YOU'RE GONE?**

If you don't have an estate plan,
the State of [Name]
has one for you



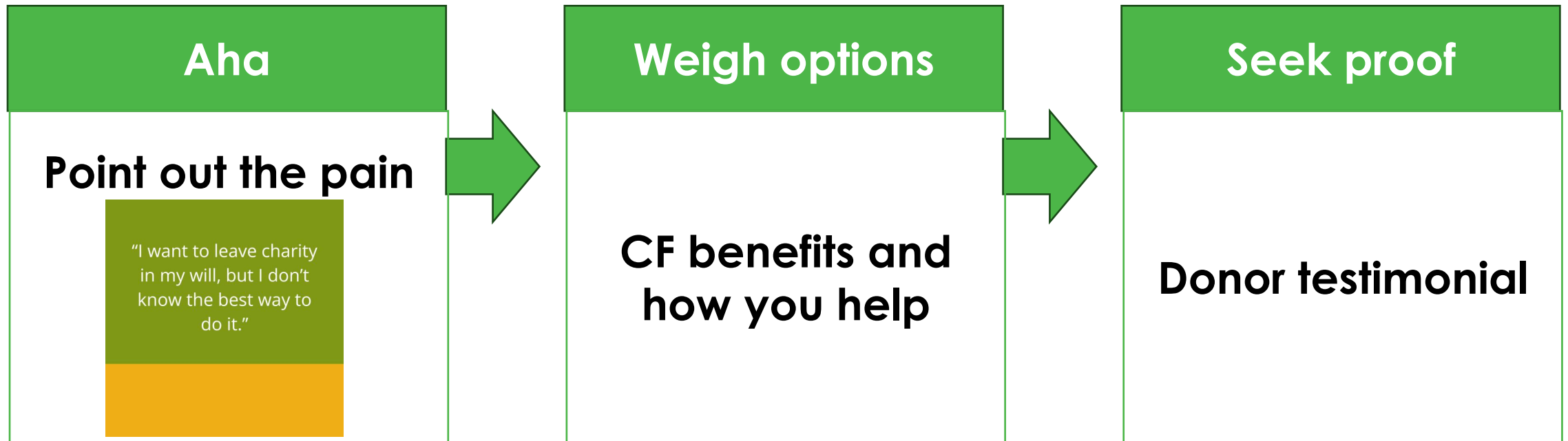
TRANSFER OF WEALTH

\$X billion will be passed down
over the next 10 years in our
county, and much of it will leave
our area



All of these are good messages...some just create more clicks than others.

★ Message across the journey



CF Benefits

CF simplifies the estate gift process

Establishing a fund at CF as part of your estate allows you to:

- Manage wishes and make changes cost-free via a simple memo
- Support your favorite nonprofits or choose community grantmaking funds that align with your interests
- Give almost any kind of asset, from real estate and stock to retirement plans and life insurance proceeds
- Avoid setup costs and ongoing management of a private foundation
- Give anonymously, if you wish

Legacy Society

Through our Legacy Society, we recognize people who have made a promise to the future of our region through designating gifts to and through CF in their estate plans or giving significantly to CF in their lifetime.

These planned gifts can take many forms:

- Making a bequest to CF in a will or revocable trust
- Designating CF as the beneficiary of an IRA, retirement plan, charitable gift annuity or life insurance policy

★ Message across the journey



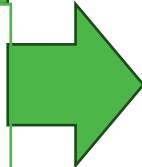
A video player showing a woman speaking. The video is titled "Charitable Tax Savings Through Retirement Funds" and includes a "Sign Up" button. The text below the video reads: "Learn how your retirement assets can be a powerful, tax-free way to support our community for..."

★ Message across the journey

Aha


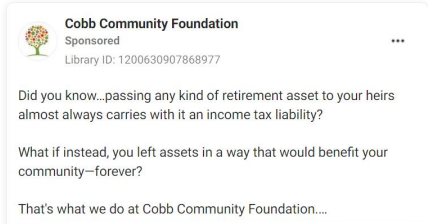
Point out the pain

"I want to leave charity in my will, but I don't know the best way to do it."

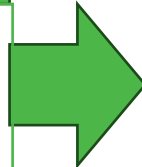


Weigh options

CF benefits and how you help


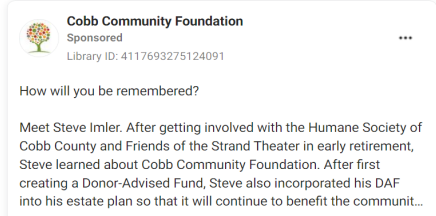


Charitable Tax Savings Through Retirement Funds
Learn how your retirement assets can be a powerful, tax-free way to support our community for...

[Sign Up](#)

Seek proof

Donor testimonial



Charitable Tax Savings Through Retirement Funds
Learn how your retirement assets can be a powerful, tax-free way to support our community for...

[Sign Up](#)

Videos and photos of you and your donors do VERY well on social media


2.5% Click Thru

Cobb Community Foundation
Sponsored
Library ID: 1200630907868977

Did you know...passing any kind of retirement asset to your heirs almost always carries with it an income tax liability?

What if instead, you left assets in a way that would benefit your community—forever?

That's what we do at Cobb Community Foundation....



Charitable Tax Savings Through Retirement Funds
Learn how your retirement assets can be a powerful, tax-free way to support our community for... [Sign Up](#)

1.69% Click Thru

Cobb Community Foundation
Sponsored
Library ID: 4117693275124091

How will you be remembered?

Meet Steve Imler. After getting involved with the Humane Society of Cobb County and Friends of the Strand Theater in early retirement, Steve learned about Cobb Community Foundation. After first creating a Donor-Advised Fund, Steve also incorporated his DAF into his estate plan so that it will continue to benefit the communit...



Charitable Tax Savings Through Retirement Funds
Learn how your retirement assets can be a powerful, tax-free way to support our community for... [Sign Up](#)



Where

CHANNELS FOR COMMUNICATION

Campaign Flow





What

MATERIALS YOU'LL NEED

★ Materials you'll need

- ✓ Social graphics, video(s) and posts
- ✓ Emails
- ✓ Planned giving web page / contact form
- ✓ Offer “packet” material

HINT

We've done all the work for you...
join our CF Accelerator

★ 3 social posts

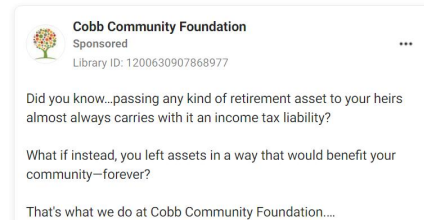
Aha

Point out the pain

"I want to leave charity in my will, but I don't know the best way to do it."

Weigh options

CF benefits and how you help



Charitable Tax Savings Through Retirement Funds
Learn how your retirement assets can be a powerful, tax-free way to support our community for... [Sign Up](#)

Seek proof

Donor testimonial



Charitable Tax Savings Through Retirement Funds
Learn how your retirement assets can be a powerful, tax-free way to support our community for... [Sign Up](#)

★ Video tips


- **Use a tripod (ring light) and a lapel mic**
- **Be mindful of the background and lighting**
 - Light source at front or 45 degree angle
- **Stand, or sit forward on a stool or tall chair**
- **Shoot horizontal, with vertical crop in mind**

Cobb Community Foundation
Sponsored
Library ID: 1200630907868977

Did you know...passing any kind of retirement asset to your heirs almost always carries with it an income tax liability?

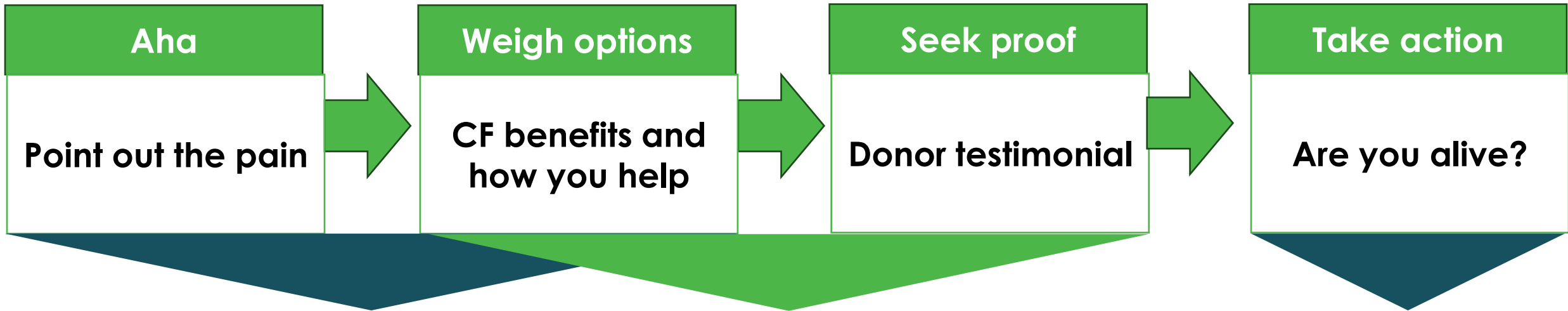
What if instead, you left assets in a way that would benefit your community—forever?

That's what we do at Cobb Community Foundation...



Charitable Tax Savings Through Retirement Funds
Learn how your retirement assets can be a powerful, tax-free way to support our community for... [Sign Up](#)

★ Prospecting emails



EMAIL 1A

Day 1

EMAIL 1B

Day 4

Resend 1A with
new subject
line to non-
opens

EMAIL 2A

Day 10

EMAIL 2B

Day 14

Resend 2B with
new subject
line to non-
opens

EMAIL 3

Day 21

★ Email format

- Repurpose your social post content
- Plain text from CEO or development officer
- Personalize with donor name

FROM: Shari Martin at Cobb Community Foundation
SUBJ: Little-Known Estate Planning Tips

{firstName} -

Are you wondering the best way to help **your** community after you're gone?

Cobb Community Foundation makes it easy to leave money in your **estate plan that will support multiple charitable causes important to you and your family.**



How? We help you...

- 1) Manage all your giving in one place. We manage your wishes through a **Memorandum of Charitable Intent**, which is a simple page outlining your instructions. **You can make changes to this Memorandum throughout your lifetime, cost free.** So, if you decide to add an organization or change the allocation, you just give us a call.
- 2) Select **qualified** organizations and causes that match your interests. We know the nonprofits in our community very well and can advise on their effectiveness. **We also provide this due diligence on charities located anywhere in the U.S.**
- 3) **Create the most impact for generations** through giving to one of our community grantmaking funds. We'll oversee grantmaking, so your dollars are constantly matched with critical needs.
- 4) Figure out the most effective ways to give. Gifts don't have to be cash—they can be charitable remainder trusts, gifts of securities, real estate, **retirement accounts** and more.
- 5) **Ensure your intentions for your giving are preserved, forever.** For example, if a nonprofit **you plan to support should close its doors years after you've passed away**, we make sure to redirect the funds in a way that ensures the original purpose of your gift will be honored. Our Board of Directors stewards the funds, and we have systems of accountability and transparency to safeguard your intentions.

Give me a call at 770-859-2366 or email me at Shari@cobbfoundation.org, and let's start the conversation.

Sincerely,
Shari

★ Landing Page

- ✓ Overview of planned giving
- ✓ Call to Action – up top:
 - Get Started
 - Download guide
- ✓ Types of gifts accepted
- ✓ Donor story

The screenshot shows the landing page for the Cobb Community Foundation. At the top, there is a navigation bar with links for 'BLOG', 'CONTACT', and '770.859.2356'. Below this is the foundation's logo and a 'DONOR VIEW' button. A secondary navigation bar includes links for 'WHO WE ARE', 'WHAT WE DO', 'INDIVIDUALS & FAMILIES', 'NON-PROFITS', 'ADVISORS', and 'BUSINESSES'. The main content area features a large image of a diverse group of people, with the headline 'CREATE A LASTING IMPACT ON THE COMMUNITY YOU LOVE'. Below the image is a 'Get Started' section with a form to request more information. To the right, there is a 'Donor Story' section featuring a photo of Shelly Owens, Director of Stakeholder Engagement, with her contact information and a 'DOWNLOAD BROCHURE' button.

COBB COMMUNITY FOUNDATION

DONOR VIEW GIVE
COBB COMMUNITY CONNECTION

WHO WE ARE WHAT WE DO INDIVIDUALS & FAMILIES NON-PROFITS ADVISORS BUSINESSES

CREATE A LASTING IMPACT ON THE
COMMUNITY YOU LOVE

At Cobb Community Foundation, we believe in the power of giving back to our community and creating a lasting impact for future generations.

One of the most meaningful ways to achieve this is through an estate gift. By including charitable gifts to CCF in your will or trust, you can leave a legacy that helps support community needs and causes you care about long into the future.

Get Started

Want to learn more? Fill out the form and Shelly will be in touch with you shortly.

Name (Required)

First Last

Email (Required) **Phone (Required)**

Do you prefer an email or phone call? (Required)

Email
 Phone Call

SHELLY OWENS
Director of Stakeholder Engagement
770-859-2357
Email Shelly

[DOWNLOAD BROCHURE](#)



[DONOR VIEW](#) [GIVE](#)


[COBB COMMUNITY CONNECTION](#)

[WHO WE ARE](#) [WHAT WE DO](#) [INDIVIDUALS & FAMILIES](#) [NON-PROFITS](#) [ADVISORS](#) [BUSINESSES](#)

CREATE A LASTING IMPACT ON THE **COMMUNITY YOU LOVE**



 EN ^

 Privacy - Terms

★ Packet materials—examples

You don't have to have a packet. You can ask people to schedule a consultation.

Legacy Society Brochure



ACTIVATE GOOD

Meet Legacy Society Member **Steve Imler**

A catalyst for a thriving community

Through mobilizing resources, empowering community problem solving, and equipping nonprofits to accelerate positive change, Cobb Community Foundation is improving quality of life in and around Cobb.

As a trusted steward of over **200 charitable funds** and **\$30 million** in assets, CCF harnesses the power of collective giving to ignite good that lasts for generations.

Legacy Society

Create a lasting impact on the community you love

COBB COMMUNITY FOUNDATION

1100 Circle 75 Parkway, Suite 1000
Atlanta, Georgia 30339
cobbfoundation.org | (770) 859-2386

WHAT YOU CAN GIVE

We can accept many kinds of assets, helping you maximize your giving and find tax advantages.

- Cash
- Business Interests
- Life Insurance / Annuities
- Appreciated Stock or Securities
- Retirement Funds
- Real Estate

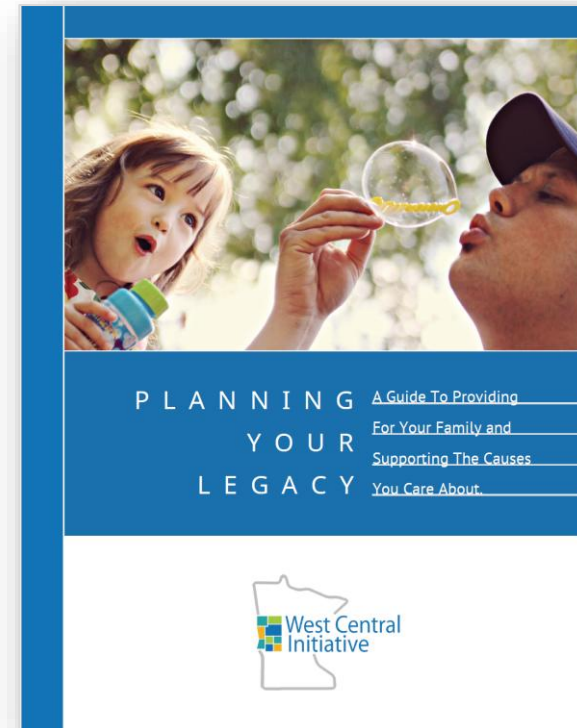
MEMBER BENEFITS

When you create a legacy gift, you'll be invited to:

- Name your charitable fund**
We encourage you to use your gift to honor the name of your family or loved ones. Of course, you may choose anonymity instead.
- Attend special community events**
We'll introduce you to other generous people who have also provided for our community's future in their estate plans.
- Be recognized in Cobb Community Foundation publications**
We'd like to give others the opportunity to follow your example of community stewardship and leadership. Of course, we also respect the wishes of those who prefer to give anonymously.

Call (770) 859-2386, visit cobbfoundation.org, or email ccfteam@cobbfoundation.org to learn more.

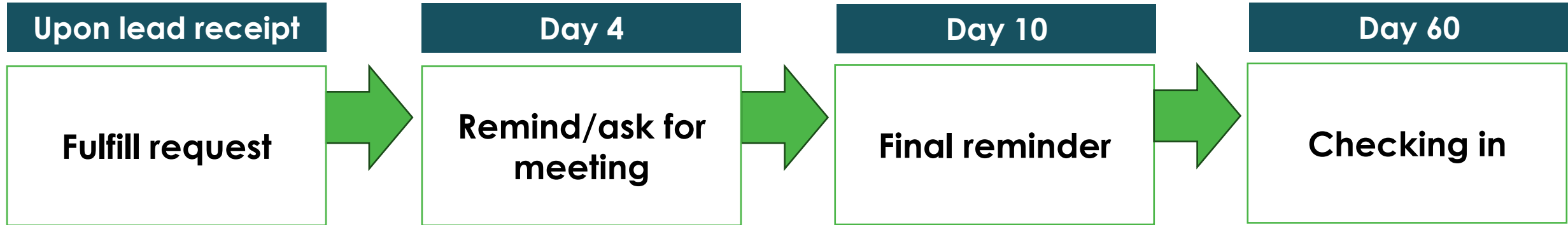
Estate Planning Guide (Crescendo)



PLANNING YOUR LEGACY A Guide To Providing For Your Family and Supporting The Causes You Care About.

West Central Initiative

★ Follow-up emails



- “Here’s your packet”
- “Here are some available times to meet”

- “Are you available for a meeting or call next week?”
- “Here’s a donor story you might be interested in.”

- “Happy to meet when you’re ready...in the meantime, I’ll put you on our mailing list.”

- “Following up on your inquiry...here’s a piece of info you might be interested in.”

Woohoo! Let's implement this!





Emails for Current List

★ Audience

**Everyone in your
database**

Remove people with known planned gifts, nonprofit leaders, etc.

★ Spotty contact info? Enhance your data.

Existing Contacts

Data companies can...

- Append email addresses
- Append demographic and interest information like wealth score and age

New Contacts

- Purchase contact list with email/mail (ex: Claritas)
- Example:
45+, more than \$500 in charity in past year, specific zips or counties

It's perfectly legal to send email to purchased lists, as long as you have your mailing address on the email and offer a way to unsubscribe.

★ Getting Started in MailChimp

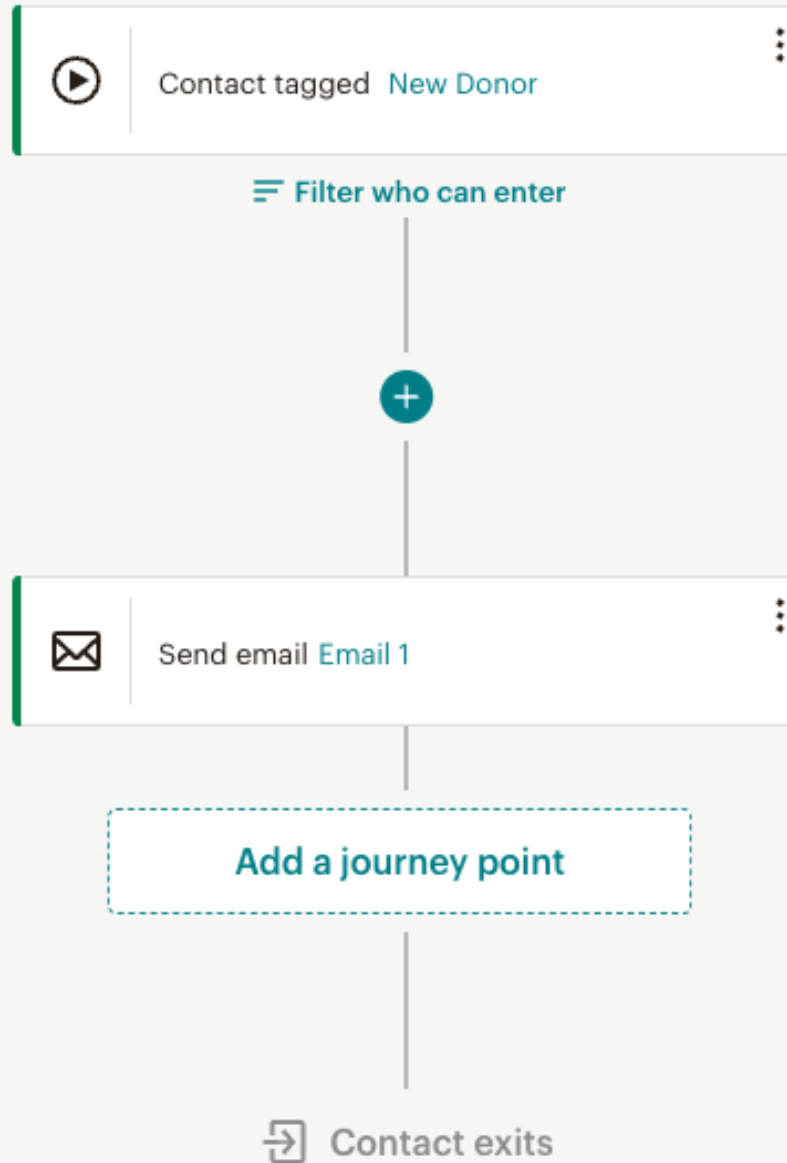
Set up your account and review details

If these are not set up correctly, your emails may end up in spam!

Organization
name, details,
and URL

Domain
Verification

Create an Automated Journey



You'll need to upgrade to activate a Custom Journey. The Essential Plan includes 400 journey points and a Standard Plan includes 1000 journey points.

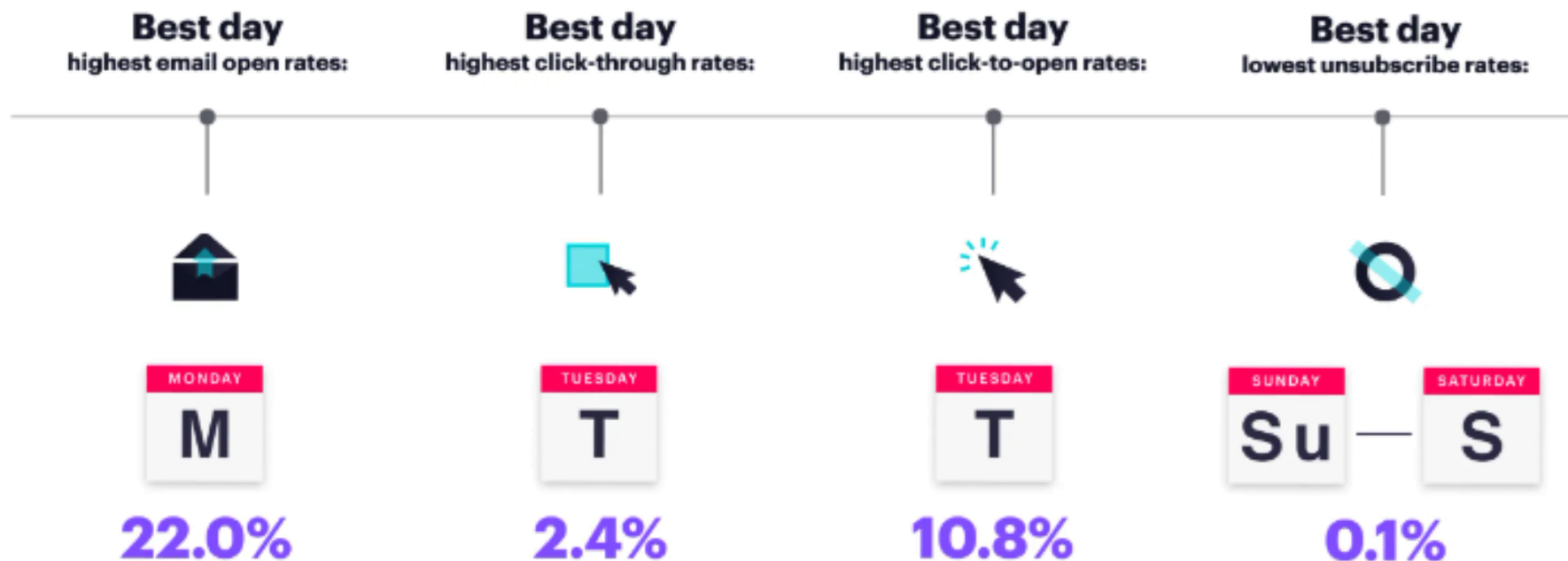
Rules

- If/Else
- Percentage Split
- Wait for trigger
- Time delay

Actions

- Send email
- Send SMS (New)
- Webhook (Beta)

★ Initiate on Monday or Tuesday, between 10-2

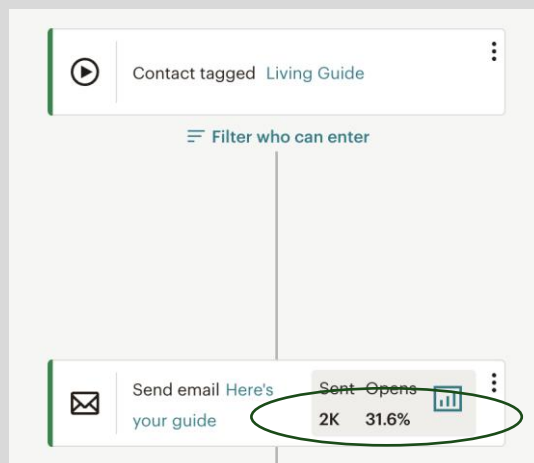


Source: MailChimp

★ Maximize your email power

Improve open rates

- Check open rate in journey: if rate on email is low (under 25%), update the subject line



Clean up audience regularly

Consider archiving unengaged contacts 2x yearly

1. Go to *Segments > Create Segment > Email Subscription Status* (select all but Subscribed)
2. Select all contacts in segment
3. Archive contacts



Meta Ads

**Do I need to run ads, when our
most loyal donors follow our
page?**

6 out of
every 100

followers will see your
timeline posts


★ Getting Started on Meta Ads

Requires admin access to your organization's Facebook page
(and Instagram if applicable)

1. Meta Business Manager


2. Meta Ads Account


When this is complete, add payment

Boost post 

Ad account
Johanna Hoffman (1102... ▼


Goal
What results would you like from this ad?

 **Get more website visitors** ⓘ
Show your ad to people who are likely to click on a URL in it. [Change](#)

Boost post 

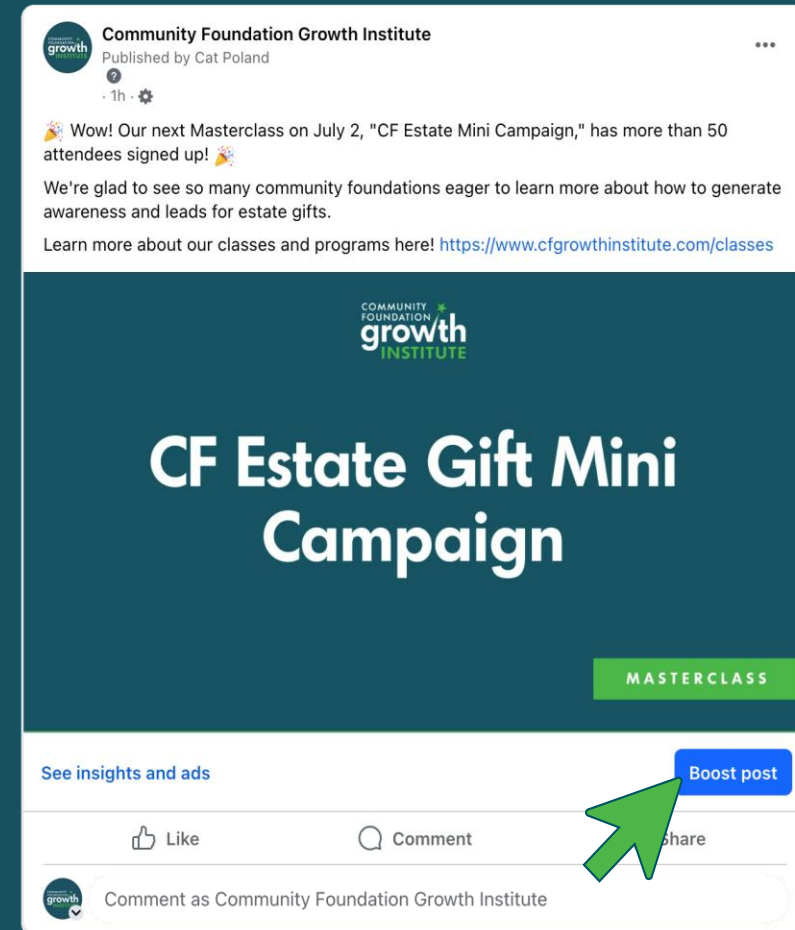
Ad account
ABC Foundation (1015... ▼

Goal
What results would you like from this ad?

 **Get more website visitors** ⓘ
Show your ad to people who are likely to click on a URL in it. [Change](#)

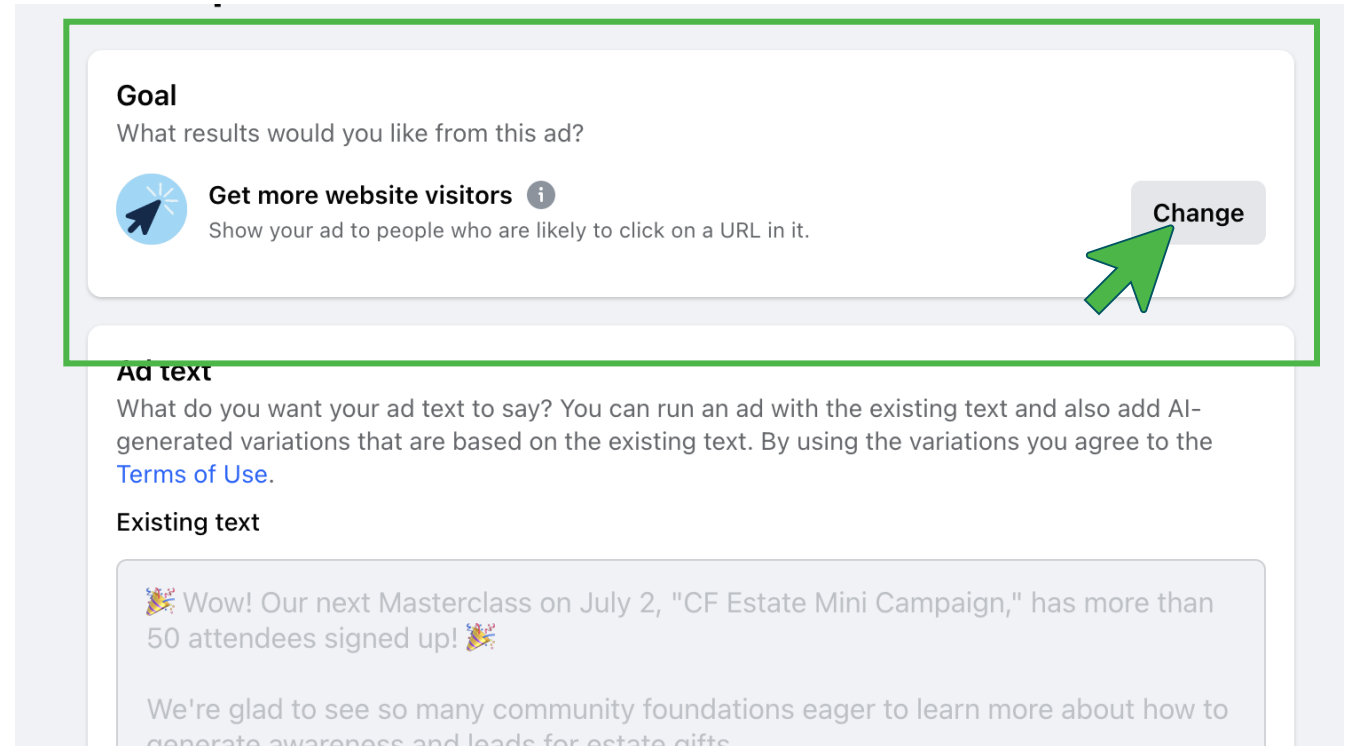
Option 1: Boost post for traffic

After posting on your timeline, click “boost post”




★ Recommended “Boost” settings

Update goal to
Get more website visitors





Goal
What results would you like from this ad?

 **Get more website visitors** ⓘ
Show your ad to people who are likely to click on a URL in it.

Change

Ad text
What do you want your ad text to say? You can run an ad with the existing text and also add AI-generated variations that are based on the existing text. By using the variations you agree to the [Terms of Use](#).

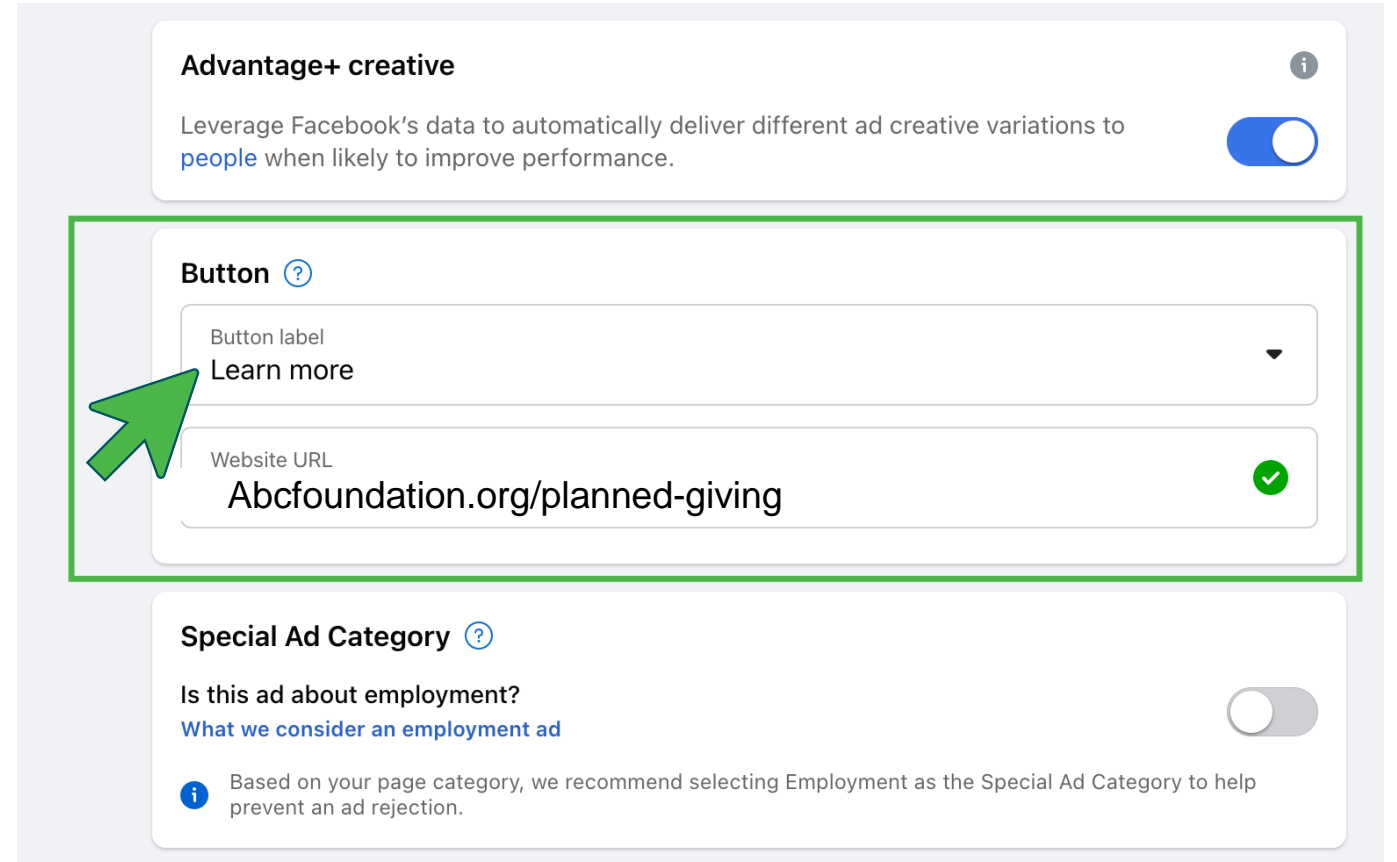
Existing text

 Wow! Our next Masterclass on July 2, "CF Estate Mini Campaign," has more than 50 attendees signed up! 

We're glad to see so many community foundations eager to learn more about how to generate awareness and leads for estate gifts.

★ Recommended “Boost” settings

Update button to
Learn more
and directly link
Website URL to your
new landing page



The screenshot shows the Facebook Boost settings interface. A green box highlights the 'Button' and 'Website URL' sections. A green mouse cursor points to the 'Learn more' button label. The 'Advantage+ creative' toggle is turned on, and the 'Special Ad Category' toggle is turned off.

Advantage+ creative ⓘ
Leverage Facebook’s data to automatically deliver different ad creative variations to [people](#) when likely to improve performance.

Button ⓘ

Button label
Learn more ▼

Website URL
Abcfoundation.org/planned-giving

Special Ad Category ⓘ

Is this ad about employment?
[What we consider an employment ad](#)

ⓘ Based on your page category, we recommend selecting Employment as the Special Ad Category to help prevent an ad rejection.

★ Recommended “Boost” settings

Update audience details

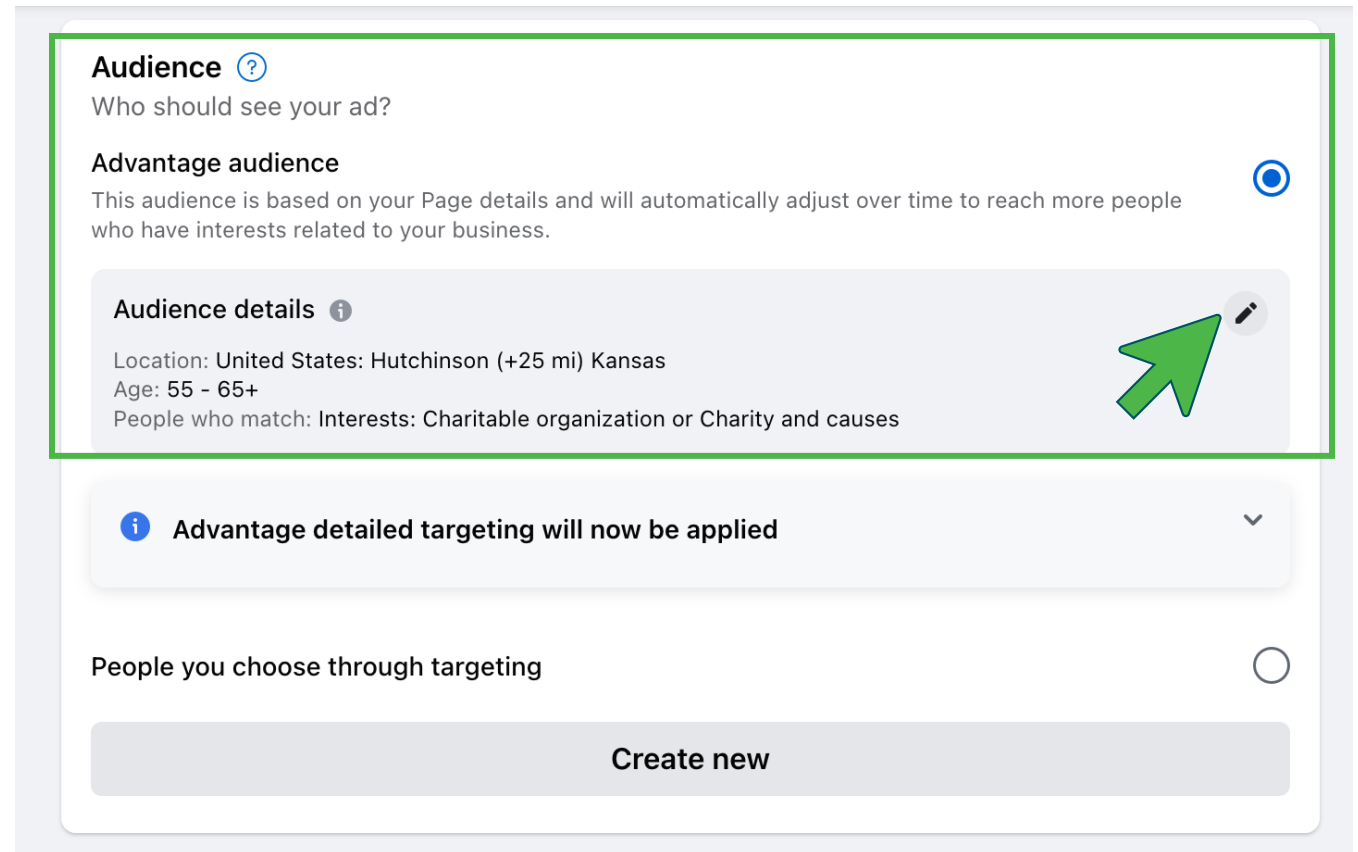
Location: [your service area]

Age: 55+

(If large service area)


People who match:

Charitable organization or
Charity and causes



Audience ?
Who should see your ad?

Advantage audience
This audience is based on your Page details and will automatically adjust over time to reach more people who have interests related to your business.

Audience details i 

Location: United States: Hutchinson (+25 mi) Kansas
Age: 55 - 65+
People who match: Interests: Charitable organization or Charity and causes

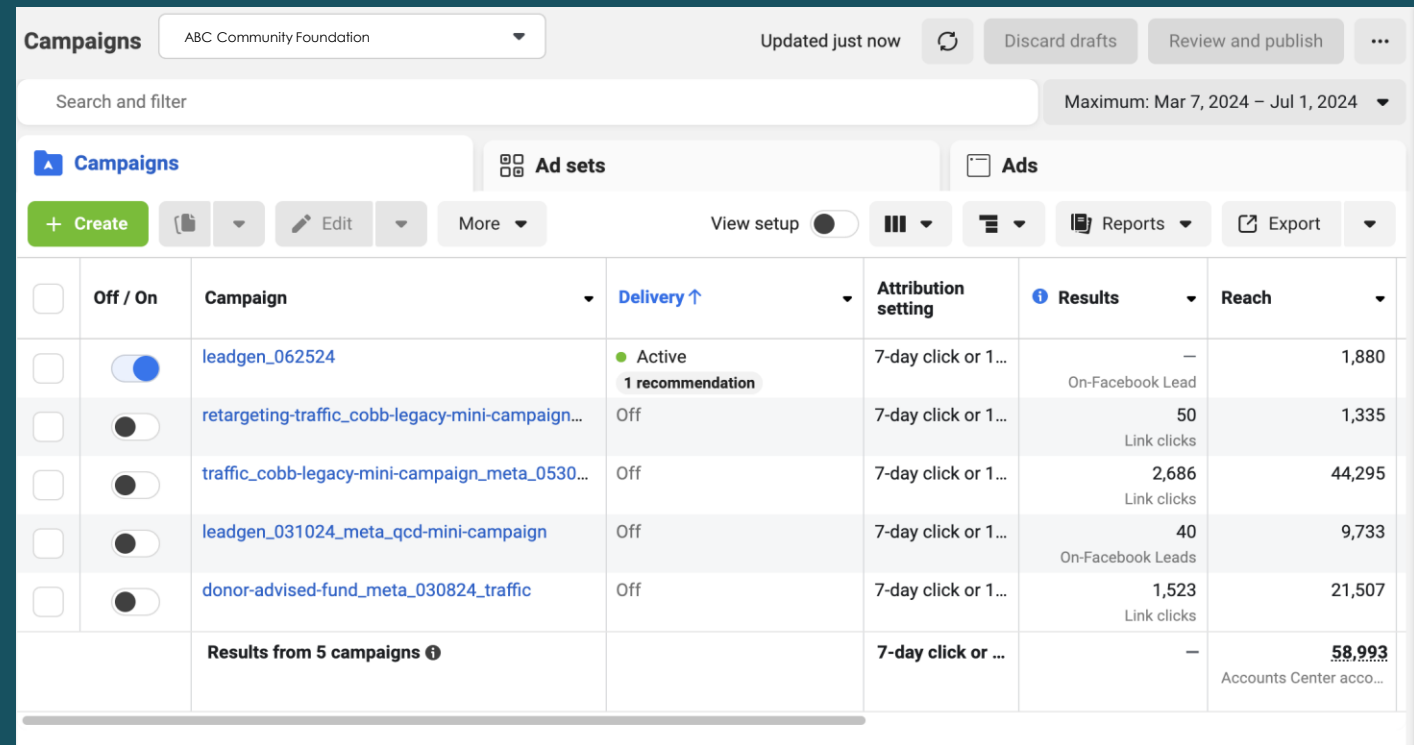
i Advantage detailed targeting will now be applied ▼

People you choose through targeting

Create new

Option 2: Use Ads Manager to create ads with built-in forms

- Campaign goal options
- Advanced audience targeting
- Tracking and reporting



The screenshot displays the Facebook Ads Manager interface for the 'ABC Community Foundation' account. The top navigation bar includes 'Updated just now', 'Discard drafts', and 'Review and publish' buttons. A search and filter bar is present, along with a date range selector set to 'Maximum: Mar 7, 2024 - Jul 1, 2024'. The main content area shows a list of campaigns with the following columns: Off / On, Campaign, Delivery, Attribution setting, Results, and Reach. The table contains six rows of campaign data and a summary row for 'Results from 5 campaigns'.

<input type="checkbox"/>	Off / On	Campaign	Delivery	Attribution setting	Results	Reach
<input type="checkbox"/>	<input checked="" type="checkbox"/>	leadgen_062524	Active 1 recommendation	7-day click or 1...	— On-Facebook Lead	1,880
<input type="checkbox"/>	<input type="checkbox"/>	retargeting-traffic_cobb-legacy-mini-campaign...	Off	7-day click or 1...	50 Link clicks	1,335
<input type="checkbox"/>	<input type="checkbox"/>	traffic_cobb-legacy-mini-campaign_meta_0530...	Off	7-day click or 1...	2,686 Link clicks	44,295
<input type="checkbox"/>	<input type="checkbox"/>	leadgen_031024_meta_qcd-mini-campaign	Off	7-day click or 1...	40 On-Facebook Leads	9,733
<input type="checkbox"/>	<input type="checkbox"/>	donor-advised-fund_meta_030824_traffic	Off	7-day click or 1...	1,523 Link clicks	21,507
Results from 5 campaigns ⓘ				7-day click or ...	—	58,993 Accounts Center acco...

Ads Manager ads will not show up on your organization's page as posts


Instant Form example

Cobb Community Foundation
Sponsored
Library ID: 1200630907868977

Did you know...passing any kind of retirement asset to your heirs almost always carries with it an income tax liability?

What if instead, you left assets in a way that would benefit your community—forever?

That's what we do at Cobb Community Foundation....



Charitable Tax Savings Through Retirement Funds
Learn how your retirement assets can be a powerful, tax-free way to support our community for... [Sign Up](#)

Contact Information ⓘ

Confirm the details you'd like to share with us:

Full name
Enter your answer.

Email
Enter your answer.

[Next](#)

Privacy Policy

By clicking Submit, you request Facebook to send your info to Takanomi. Keep in mind that Facebook does not control how Takanomi will use your info. Facebook will also use your info subject to our Data Policy, including to auto-fill forms for ads. For more info you can contact the advertiser on their Page. [View Facebook Data Policy](#), [View Takanomi's Privacy Policy](#), [Go to Takanomi on Facebook](#).

[Submit](#)

Thanks, you're all set.

You can visit our website or exit the form now.

ⓘ You successfully submitted your responses.

[View Website](#)

★ Budget recommendation

Traffic (Boosted post) campaign

- Start with about \$10-\$20 per 1,000 people reached per week

Leads (Instant Forms) campaign

- \$20+/day. Be patient--results can vary greatly (\$60-\$300+ per lead)

Measuring Success:
Meta Benchmarks

>1% click thru

Cost per click \$0.50-\$1

So, you got a lead. Now what?

Here's the secret: automate ongoing engagement.

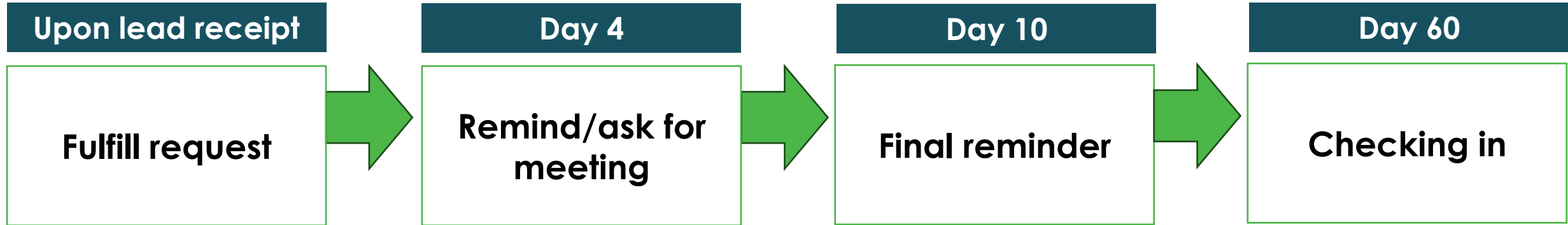
★ Ongoing lead nurture

This is a marathon, not a sprint.

- ✓ 3-4 personalized email touches in 60 days
- ✓ Add to your email newsletter list / 12-month new donor automation
- ✓ Add to your annual report mailing list



★ You can automate emails



- “Here’s your packet”
- “Here are some available times to meet”

- “Are you available for a meeting or call next week?”
- “Here’s a donor story you might be interested in.”

- “Happy to meet when you’re ready...in the meantime, I’ll put you on our mailing list.”

- “Following up on your inquiry...here’s a piece of info you might be interested in.”

YouTube/Google Video

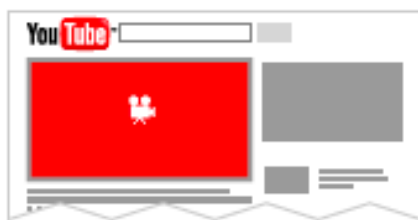


★ Why YouTube/Google Video?

- Easy way to reach more people through repurposing your Facebook video
- Target down to a 1-mile radius
- Very inexpensive
- People think you're famous—it's like being on TV



"Skippable" Pre-Roll Ads, Which Can Be Any Length



"Non-Skippable" Pre-Roll Ads, 15 or 30 Seconds Long



6 Second "Bumper" Ads That Can't Be Skipped

Streaming



★ Targeting options



LOCATION

Include locations by ZIP code, city, state, or DMA.



GENDER & AGE

Select gender, and age ranging from 18-50+.



AUDIENCE

You can target audiences based on behavior, interests, and demographics.



PLATFORM

Select the streaming platforms on which to show your ad-television, mobile, and desktop.



GENRE

Chose from several genres, such as comedy, drama, international, sports and science fiction.

★ Targeting options



Custom audience segments that
go beyond age and gender

★ Placement examples

Devices: Smart TV | Roku | Fire TV | Apple TV | XBOX

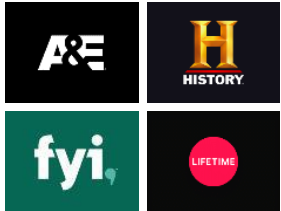
Screens: CTV | Mobile App | Desktop & Mobile Web

Creative: 15/30/60 sec or odd length

Ad Format: Non-skippable mid-/pre-roll

CABLE NETWORKS

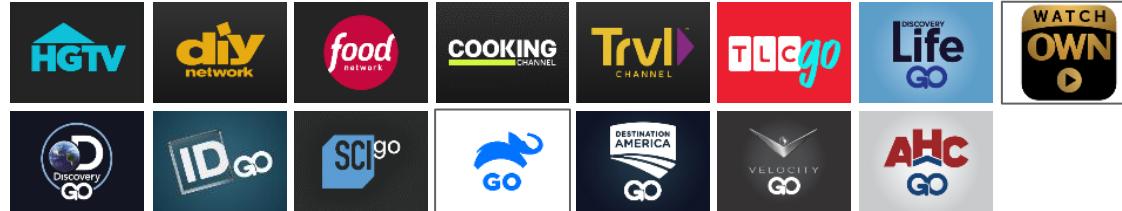
A&E



AMC



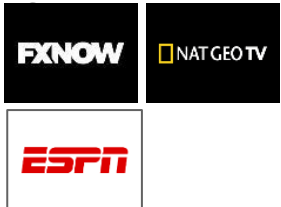
Discovery



FOX



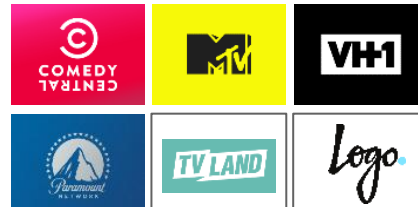
Disney/AB



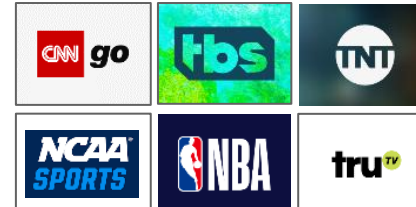
NBCUniversal



ViacomCBS



WarnerMedia



BROADCAST NETWORKS



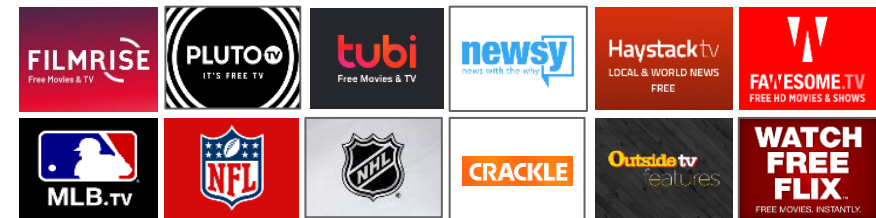
AVOD/MVP



OEM



DIGITAL FIRST



Newspaper

IS IT STILL RELEVANT?



CREATE A *Lasting Legacy*

Every life makes a ripple. It impacts the people you care for, the community you support—it's the legacy you hope to build.

Placer Community Foundation is here to help you create that legacy. We work with you and your estate planning advisor to determine tax-wise ways to support the causes you care about for generations:

- Give to your favorite nonprofits and causes
- Manage gifts to multiple charities in one place via a simple memorandum, which you can change at any time cost-free
- Give almost any kind of asset (stock, real estate, retirement plans, life insurance proceeds)
- Avoid setup costs and management of a family foundation



Call (530) 885-4920 or visit PlacerGives.org to learn more.



“ We want to continue to make this community a good place to live, work, grow up in, and even grow old in. ”

– Sheila Cardno and Kim Silvers
PCF Fundholders and Legacy Society Members



You too, can leave a lasting mark in your community.

At Placer Community Foundation we can help you support all the causes important to you and your family, for generations to come.

- Manage gifts to multiple charities in one place via a simple memorandum that you can change at any time with the Foundation, cost free
- Give almost any kind of asset (stock, real estate, retirement plans, life insurance proceeds)
- Avoid setup costs and management of a family foundation



Call (530) 885-4920 or visit PlacerGives.org to arrange for a free, no obligation consultation.

★ Summary

- Awareness is the first step
- Message to address your audience's pain points
- Email and Meta are the most efficient channels
- It takes money to make money
- Automate to save time and energy

Questions?



Opportunities

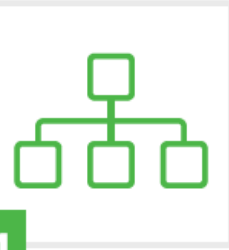
JOURNEY TO YES

A blueprint to transform communications and achieve a new level of **impact**.

For CF's struggling with an unclear message and sporadic efforts.

DISCOVER

GET ORGANIZED



01

INTERVIEW STAKEHOLDERS



02

REVIEW PEERS/COMPETITION



03

DEFINE

OUTLINE OPPORTUNITIES



04

DEFINE BRAND FOUNDATION



05

PREPARE TO VISUALIZE MESSAGE



06

DEVELOP

DEVELOP AUDIENCE JOURNEYS



07

DEVELOP COMMUNICATIONS STRATEGY



08

DEVELOP DETAILED PLAN



09

A large group of people, mostly women, are seated around a long table covered with a black tablecloth. Many of them have their hands raised in the air, suggesting an interactive session or a presentation. The setting appears to be a conference room or a large meeting space.

NONPROFIT CAPACITY BUILDING

Create a cohort of nonprofit partners to do **Journey to Yes** communications planning together

A close-up shot of a woman with blonde hair, smiling broadly. She is holding a green sign that reads "Community Foundation Marketing Intensive" and "April 21 - April 22, 2014".

Community Foundation
Marketing Intensive
April 21 - April 22, 2014



The Accelerator

For CF's and local nonprofits with a clear message and communications staff looking to implement faster and more effectively

- Monthly masterclasses on marketing and organizational development topics– live and on-demand
- Library of “how to” videos and materials
- Templates for common awareness/development campaigns
- Weekly coaching/Q&A calls
- Quarterly planning workshops

“It’s like having a fractional marketing director and a therapist!”

CF Awareness 12-Month Campaign

“Will You Help Fund These Grants?” Campaign

End of Year Campaign

Annual Reports without the Angst

From Vanilla to Vavoom! Transforming Random Acts to Intentional Engagement

3 Tips for 2025

Strategic Social Media

New Donor 12-Month Email Campaign

Coming Soon!

- **Activate Your Board as Ambassadors**
- **The Power of Testimonials**

STRATEGIC PLAN NAVIGATOR

ALIGN

01

KICK OFF

- Onboard
- Establish Timeline and Accountabilities
- Establish Steering Committee
- Gather Information: Organization Profile

ASSESS

02

ORGANIZATION

- Organizational Strength & Capacity Questionnaire



03

ISSUES

- SDG Questionnaire / Community Indicators Questionnaire



04

STAKEHOLDERS

- 12-15 Depth Interviews (45 minutes)



05

PEERS

- Peer Benchmarking
- Analyze 4-6 Peer Strategic Plans

DEVELOP

06

MANIFESTO

- Team (or Board) Workshop
- Develop Manifesto
- Develop Big Goals



07

STRATEGY MAP

- Define Priorities



08

SCORECARD

- Define Metrics and Milestones

ACTIVATE

09

INITIATIVES

- Define Key Initiatives



10

ACTION PLAN

- Create Work Plans With Tactics, Timing, and Responsibilities



11

INAUGURATION

- Package the Plan
- Commitment Ceremony
- Communicate to Public



COMMUNITY
FOUNDATION
growth
INSTITUTE

CFGROWTHINSTITUTE.COM

POWERED BY
BOWERCOMM



Connected, Impactful Philanthropy

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We would love to hear your thoughts on the breakout session you just attended! Your feedback is invaluable in helping us improve future sessions. Please take a moment to evaluate your experience by considering the content, engagement level, and overall value. Thank you for your participation!

