



Williams  
Marketing  
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## Robert Tobin

Senior Consultant  
and Principal

Bob Tobin consults with a wide variety of private and public corporations. His focus is business planning, marketing strategy development, and communications program design and message development.

He is engaged as a consultant, presenter (for executive and employee audiences), and facilitator by a range of organizations. He has worked with clients and projects throughout North America and the United Kingdom. His client references include:

- Citibank
- DuPont Canada
- Ford Motor Company
- IBM
- Johnson & Johnson
- Lucent Technologies
- Owens Corning
- Steelcase
- Toronto Dominion Bank
- United States Federal Government (GSA Region 9)

Bob and the WMS team have developed specialized knowledge in the field of philanthropic foundations. His references in this field include:

- The California Community Foundation
- The California Endowment
- The Cleveland Foundation
- The Community Foundation for Southeastern Michigan
- The Council of Michigan Foundations
- The Fremont Area Foundation
- The Community Foundation for Greater Flint
- The Grand Rapids Foundation
- The Kalamazoo Foundation
- The Kresge Foundation
- The League of California Community Foundations
- The Community Foundation for Muskegon County

Bob has also been a speaker at the Council on Foundations 1999 Annual Conference in New Orleans and the 1999 Fall Conference for Community Foundations in Denver, as well as at several community foundation association and RAG meetings.

## About the Michigan Venture Products Fund

### Introduction

The Venture Products Fund (VPF) is a Council of Michigan Foundations initiative created to support the growth of Michigan Community Foundations. VPF tools are developed to help Community Foundations enhance their success in building relationships with three primary audiences:

- *Existing donors*
- *Prospective donors*
- *Professional advisors – including estate planners, attorneys, CPAs, and financial agents*

### A Dynamic Environment

Community Foundations are part of the rapidly growing – and changing – field of organized philanthropy. A series of social, economic, legal, and technological trends have led to the entry of new players and the emergence of innovative new products in our field.

From the use of Charitable Debit Cards in the United Kingdom, to the enormous growth of Fidelity's Charitable Gift Fund here in the United States, to the start up of dozens of on-line, charitable giving services, the face of philanthropy is changing dramatically. It's anything but "business as usual."

The challenges created by a shifting environment are matched by the unprecedented levels of opportunity provided us through a huge intergenerational transfer of wealth and steady economic growth. Taken together, these challenges and opportunities have caused Community Foundations to re-examine our role in today's market, and to explore ways to enhance our position and relationship with potential donors.

Throughout the Community Foundation field in the United States, there is concern over the relative lack of awareness of who we are and what we deliver. There is also a growing desire to more effectively promote and communicate our value to our primary audiences.

### The Michigan Experience

In response to its Community Foundation members, the Council of Michigan Foundations (CMF) has undertaken research and development activity aimed at addressing these issues. Supported by grants from the W.K. Kellogg Foundation and the C.S. Mott Foundation, an effort is underway to help Michigan's Community Foundations develop and market a "brand" identity and packaged products that would help ensure our continued growth and impact in the communities we serve.

Started in 1995 as the Branding Project, it is now known as the Venture Products Fund (VPF). During 1999, several teams were formed – with membership drawn from the ranks of Community Foundation CEOs, trustees, and staff. Each team was given a particular focus:

- *Communications team – developing and marketing our message*
- *Product team – exploring product packaging and new product opportunities*
- *Advisor team – creating messages and products targeted to professional advisors*

For the past eighteen months, the VPF teams have been collecting and assessing research, developing new communications and product tools, implementing a "Building Community Foundations" training and capacity development program, and preparing a statewide promotional campaign targeting professional advisors, beginning Fall 2000.

### **Marketing, Branding, and Standards**

The opportunities and issues uncovered in pursuing this initiative have caused us to explore fundamental questions with long-term implications for Michigan Community Foundations.

If our field wants to build a stronger market presence, we must build a more unified brand, which in turn requires us to offer products and services that meet certain standards of quality. Michigan Community Foundations are currently participating in a statewide dialogue and preparing to make significant business decisions related to changing their local identities and adopting standards of performance. This process is critical to our ability to move forward as a statewide field.

### **June 2 Presentation**

In our June 2 meeting, Bob Tobin of Williams Marketing Services (the firm hired to support the Michigan VPF initiative) will overview the Michigan experience – with a focus on new tools and brand identity.