



Healing Hands Hospital

*Your legacy will heal the world.*

**MARKETING PLAN**

**PLANNED GIVING AND ENDOWMENTS**

# The Team

Prepared For: Ed S.  
Course: FUND 5568  
Planned Giving and Endowments  
Due Date: June 10, 2020



Michele W.

Director of  
Planned Giving



Jade M.

Director of  
Prospect  
Research



Michelle d.

Director of  
Marketing



# Major Topics

1. PROCESS APPROACH
2. SITUATIONAL ANALYSIS
3. STAGES DONOR JOURNEY



## Outline of Discussion

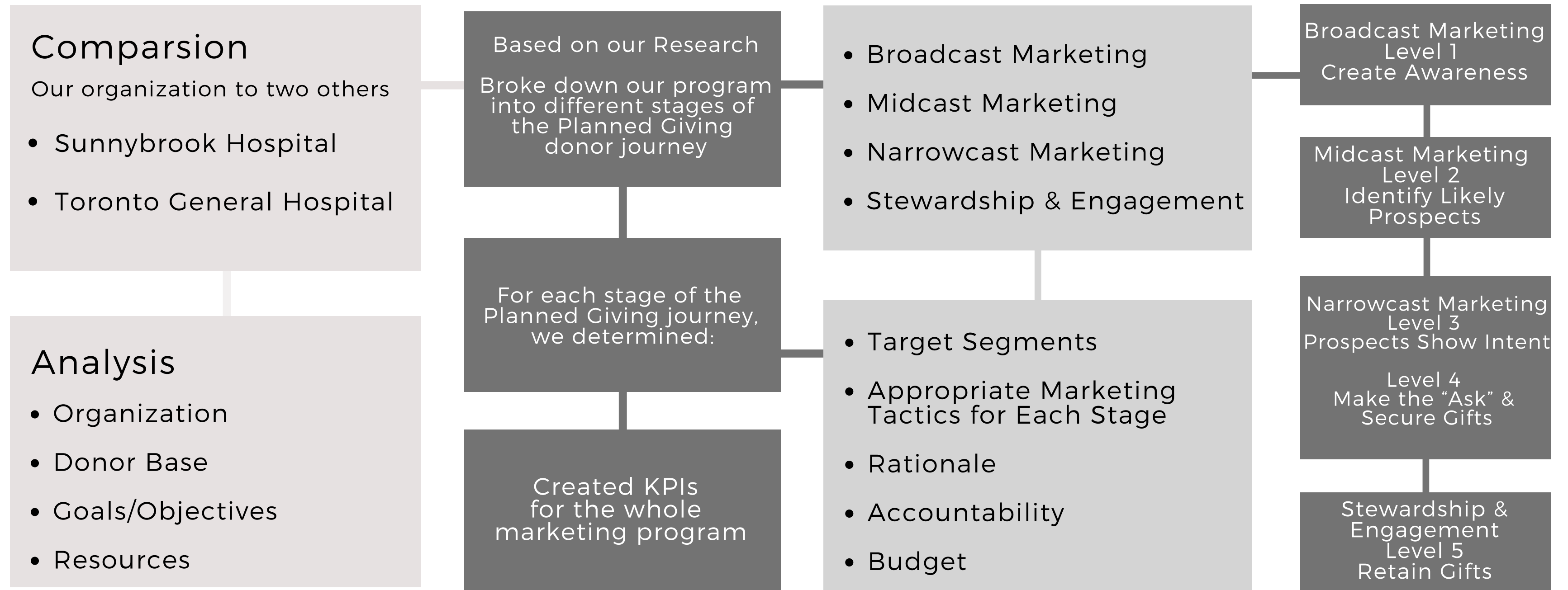
1. COMPARISON
2. ANALYSIS
3. RESEARCH
4. ORGANIZATION
5. DONOR BASE
6. GOALS
7. RESOURCES
8. GIFT TYPES
9. KEY MESSAGING
10. BROADCAST MARKETING
11. MIDCAST MARKETING
12. NARROWCAST MARKETING
13. STEWARDSHIP AND RE-ENGAGEMENT
14. MARKETING CALENDAR
15. KEY PERFORMANCE INDICATORS (KPI)



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# PROCESS APPROACH

## Developing A Marketing Plan



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# SITUATIONAL ANALYSIS

- Large research hospital
- Large campus with many buildings
- Sees hundreds of thousands of patients a year

## ORGANIZATION

## DONOR BASE

- 500,000 names in database
- 150,000 active donors
- 55 Current PG Expectancies

## SITUATIONAL ANALYSIS

- Create awareness of PG program
- Educate and inform constituency
- Communicate the “social norm” of Planned Giving
- Identify 500 likely PG prospects
- Secure 55 new gift expectancies
- Retain 55 expected gifts

## GOALS

## RESOURCES

### PEOPLE

- Director of Planned Giving
- Planned Giving Manager
- Marketing Team
- Prospect Research Team
- Stewardship Team

### INFRASTRUCTURE

- Donor Database
- Existing Marketing Vehicles

**BUDGET** - \$50,000



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# PLANNED GIVING GIFTS

Gifts HHH will emphasize

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Bequests

RRSPs/RRIFs

Life Insurance

Charitable  
Remainder Trusts



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# KEY MESSAGING

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## Benefits to Communicate

*"Creating a gift in your will is a significant and meaningful act that will ensure your legacy is remembered."*

*"Anyone, of any means, has the ability to make a planned gift."*

*"Your income and resources you need to sustain yourself and your loved ones today are not impacted."*

*"Your legacy gift will enable you to have a greater impact on the cause you care about than you would otherwise be able to give during your lifetime."*

*"Making a planned gift will create excellent tax benefits for your estate."*

## Value Proposition

*"Your legacy will heal the world."*

## Feature Bequest Stories

- Communicates the “social norm” of planned giving
- Provides inspirational, heartfelt examples of planned gifts



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# DONOR JOURNEY

Stages of Planned Giving Donor Journey

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BROADCAST MARKETING

MIDCAST MARKETING

NARROWCAST MARKETING

STEWARDSHIP AND RE-ENGAGEMENT



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# BROADCAST MARKETING

GOAL: CREATE AWARENESS

BUDGET: \$5,000

## TARGET SEGMENT

- General public geographically located in the community
- Hospital visitors

## MARKETING TACTICS

- Onsite Advertising (i.e. 1-pager, posters, pull-up banners)
- Direct Mail Feature
- Email Newsletter
- Website Feature Page

## TACTIC RATIONALE

- Reach the broadest audience possible
- Educate and inform audience about planned giving
- Stimulate interest
- Communicate planned giving as a social norm

## RESPONSIBILITY - ACCOUNTABILITY

- Director of Planned Giving
- Planned Giving Manager
- Marketing Team



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# MIDCAST MARKETING

GOAL: IDENTIFY LIKELY PROSPECTS

BUDGET: \$15,000

## TARGET SEGMENT

- Community members aged 50+
- People who have given to the organization
  - Past Hospital Patients and their Family Members
  - Board
  - Major Gift Donors
  - Community Members with Affinity
- Current Hospital Patients and Their Family Members
- Current / Past Hospital Doctors/Researchers/Staff/Volunteers

## MARKETING TACTICS

- Targeted Direct Mail with reply card
- Financial/Estate Planning Newsletter (Printed/Digital)
- Brochure (Printed and Digital)
- Financial/Estate Planning Presentations
- Lunch n' Learn Meetings
- Donor Surveys

## TACTIC RATIONALE

- Encourage individuals to identify themselves as a prospect
- Provide more detailed information about the program
- Stimulate a deeper interest in making a Planned Gift
- Begin to cultivate relationships with prospects
- Communicate PG as a social norm

## RESPONSIBILITY - ACCOUNTABILITY

- Director of Planned Giving
- Planned Giving Manager
- Prospect Research Team
- Marketing Team



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# NARROWCAST MARKETING

GOAL: CULTIVATE & MAKE THE ASK, SECURE

BUDGET: \$10,000

## TARGET SEGMENT

- Those who are within the following groups and have expressed interest:
  - Current / Past Hospital Patients and their Family Members
  - Community Members with Affinity
  - Current Major Gift Donors
  - Current / Past Hospital Doctors/ Researchers/Staff/Volunteers
  - Board Directors & Board Members

## MARKETING TACTICS

- One-on-One Meetings
- Brochure (Printed and Digital)
- Proposal and Gift Commitment Letter
- Financial/Estate Planning Workshops

## TACTIC RATIONALE

- Build deeper, personalized relationships with PG prospects
- Provide more detailed and personalized information on PG options
- Generate sincere intent to make at PG
- Make a direct PG ask and secure gifts

## RESPONSIBILITY - ACCOUNTABILITY

- Director of Planned Giving
- Planned Giving Manager
- Prospect Research Team
- Marketing Team



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# STEWARDSHIP & RE-ENGAGEMENT

GOAL: RETAIN RELATIONSHIPS & GIFTS

BUDGET: \$20,000

TARGET SEGMENT	MARKETING TACTICS	TACTIC RATIONALE	RESPONSIBILITY - ACCOUNTABILITY
<ul style="list-style-type: none"><li>• Current expectant PG pledge donors</li></ul>	<ul style="list-style-type: none"><li>• Planned Giving Society<ul style="list-style-type: none"><li>- Events</li><li>- Healing Hands Recognition Tree</li></ul></li><li>• Personalized Email Newsletters</li><li>• Personalized Direct Mail</li><li>• One on One Meetings</li><li>• Phone call check-ins</li></ul>	<ul style="list-style-type: none"><li>• Establishing a PG society creates opportunities for the organization to constantly be in contact with PG pledge donors</li><li>• These tactics enable us to create deeper relationships with PG pledge donors to ensure their PG pledges are retained</li></ul>	<ul style="list-style-type: none"><li>• Director of Planned Giving</li><li>• Planned Giving Manager</li><li>• Stewardship Team</li><li>• Marketing Team</li></ul>



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# DONOR RECOGNITION TREE

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# MARKETING BUDGET

TOTAL MARKETING BUDGET: \$50,000

## BROADCAST ACTIVITIES

- Onsite Advertising
  - 1-pager
  - pull-up banner
  - posters
- Direct Mail
- Email Newsletter Feature
- Planned Giving Page on Website

TOTAL BUDGET: \$5,000

## MIDCAST ACTIVITIES

- Targeted Direct Mail Appeal w/ Reply Card
- Financial / Estate Planning Newsletter (Printed/Digital)
- Financial Estate Planning Presentations
- Brochure
- Lunch n' Learn Meetings
- Donor Surveys

TOTAL BUDGET: \$15,000

## NARROWCAST ACTIVITIES

- One on One Meetings
- Financial / Estate Planning Workshops
- Brochure
- Proposal and Gift Commitment Letter

TOTAL BUDGET: \$10,000

## STEWARDSHIP & RE-ENGAGEMENT ACTIVITIES

- Planned Giving Society Events
- Healing Hands Recognition Tree
- Personalized Direct Mail
- One on One Meetings
- Website
- Phone Call Check-Ins

TOTAL BUDGET: \$20,000



# MARKETING CALENDAR

JANUARY 2021 - DECEMBER 2021

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Plan/Develop Tactic												
Implement Tactic												
<b>Broadcast Activities</b>												
Onsite Advertising												
Direct Mail Feature												
Email Newsletter Feature												
Planned Giving Page on Website												
<b>Midcast Activities</b>												
Targeted Direct Mail Appeal with Reply Card												
Financial/Estate Planning Newsletter (Printed and Digital)												
Brochure (Printed and Digital)												
Financial/Estate Planning Presentations												
Lunch n' Learn Meetings (for doctors/researchers/staff)												
Donor Surveys (include question about PG intention)												
<b>Narrowcast Activities</b>												
One-on-One Meetings												
Financial/Estate Planning Workshops												
Brochure (Printed and Digital)												
Proposal and Gift Commitment Letter												
<b>Stewardship &amp; Re-Engagement Activities</b>												
PG Society - Events												
PG Society - Healing Hands Recognition Tree												
Personalized Direct Mail (Updates / Newsletters)												
One-on-One Meetings												
Phone Call Check-Ins												



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# KEY PERFORMANCE INDICATORS

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- # of Impressions on Planned Giving Page on Website
- # of Inquiries to Talk Further About Planned Giving
- # of People Who Identify Themselves as PG Pledge Donors (Donor Survey, DM Reply Cards)
- # of Financial/Estate Planning Event Attendees
- # of In-Person Prospect Visits
- # of Prospect Contact Points (phone calls, emails)
- # of Solicitations (Direct Asks Made For a PG - Letters and In Person)
- # of Expected Planned Giving Gifts Secured During the Year
- \$ of Planned Giving Expectancies Secured During the Year
- Total Number of PG Expectancies
- Total Gift of Planned Giving Expectancies
- # of In-Person Stewardship Visits
- # of Stewardship Contact Points (phone calls, emails)
- # of Attendees at Stewardship Events
- # of Hands on Healing Hands Recognition Tree





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*Thank You!*



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