How An Integrated Marketing Strategy Can Change Everything

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For many years ‘Planned Giving’ was an after thought to everyday fundraising

Often only the realm of deferred, estate gifts

Society is changing and its impacting much of what we do in the philanthropic and financial world

- Communication
  - Social Media revolution

- Banking
  - Digital only banking
  - Cryptocurrency

- Investing
  - Retail traders
  - Self directed IRA’s
  - Real estate transactions without realtors or brokers

- Legacies
  - Loved ones memorialized in unique ways, jewelry, trees, stars
How An Integrated Marketing Strategy Can Change Everything

- Our donors are used to moving in a digital consumer-based world
- Immediate information
- Opportunity to respond immediately
- Financial transaction offer swift completion with multiple options
  - CC, range of CC providers expected
  - Paypal, Google pay, Amazon Pay, Apple pay
  - Buy now, Pay Later – 4 pay services
    - Afterpay, Klarna, Quadpay, Affirm….
  - Bitcoin
    - Other Cryptocurrency development
• Moving ‘planned giving’ to ‘gift planning’ helps to frame our industry for today’s challenges

• Donor stewardship and care starts with the gift
  • Replication of financial industry client experience shows cultural understanding
  • Tax optimization and Wealth preservation speaks to an advocation for the donor who cares for your cause

• In world where customization is normal, donors are looking for options
How An Integrated Marketing Strategy Can Change Everything

• Likely you’ve seen this slide before (Russell James (2021))
• Where do we start?
• Do we know any real time examples?
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Children’s Health Legacy and PG Growth - 2018-2021

• Restarting Children’s Health program
  • Assessed where we stood
  • Previously marketing on autopilot
  • Legacy program no regular stewardship
  • Many bequests good will of community
• What did we do?
  • Revised gift acceptance policies
  • Cultivation of existing legacy members
  • Assessed loyal donors for audience
  • Build out education and gift facilitation methods to serve on donor journey
  • Marketing on calendar rhythm that served institution and made sense for public
  • Intentional integration of messaging in every communication
How An Integrated Marketing Strategy Can Change Everything

Did it work?

Teaser!
Will share real results at end of the presentation
How An Integrated Marketing Strategy Can Change Everything

• Though this presentation is about marketing and its proven success it stood on a foundation that launched it well.
  • Revised gift acceptance policies
    • Gift planning is always changing
      • Which assets will you take?
      • Who is responsible?
      • Will you use third party or in house?
    • Good policy protects non-profit
    • Good policy guides relationship manager conversations
    • Good policy makes donor stewardship easier
    • Good policy sets stage for marketing calendar and vendors to support program
How An Integrated Marketing Strategy Can Change Everything

• Know your base!
• Cultivation of existing legacy members
  • Clean up legacy society to assess membership
    • Reconfirm donor intent
  • Build branding for donors within non-profit
    • Logo
    • Membership
  • Recognition within organization
    • Stewardship
• Communication
  • Regular calls and messages
    • Their person on the inside that knows their value – Culture of family
How An Integrated Marketing Strategy Can Change Everything

• Know your base
  • Assess data base for legacy prospects
    • Annual donors
      • Loyal 5 years and $2k cume
    • Mid Level donors
      • Loyal 5 years and/or $5K cume
      • Propensity or capacity to use asset based or planned gift techniques
    • Major donors
      • Loyal donors – over annual Major gift threshold 5 years
  • Don’t forget corporate donors
  • Other stakeholders
How An Integrated Marketing Strategy Can Change Everything

• Build out education and gift facilitation methods to serve on donor journey
• Customization does not need to be complex
  • Safe and timely transaction in choice of asset
    • Use Vendors
      • Stock/IRA/DAF/Crypto
  • Strong branded website
    • Instant Information
    • Easily accessible education
      • Ways to give
      • Who has given – social proof
      • What to support
      • Will/Beneficiary details
      • Calculators
How An Integrated Marketing Strategy Can Change Everything

- Asset Based Gifts
  - Stock/IRA/DAF/Crypto
- Where do you integrate?
  - Every giving page
  - Every digital solicitation
    - Links – find more info on how to leave a legacy gift here
    - Vanity URL – childrens.com/mywill

Show Your Love

Make a Valentine’s Day gift to make life better for children

The children we see every day at Children’s Health are so brave. Many of them are facing very tough illnesses or injuries. By sending a Valentine’s Day card, you are filling the hospital with messages of encouragement and hope.

Your gift today will fund research into new treatments and cures, and help our teams provide the very best care. And you’ll support crucial programs for emotional wellbeing, such as helping to “perform” medical procedures on a teddy bear to lessen fear. Thank you for showing your love for children!

If you would like to use your Donor Advised Fund, stocks, crypto, or an IRA qualified distribution to Children’s Health, click any of the links above. For more steps and information on legacy and tax-optimizing giving, visit our gift planning page.

If making a tribute gift, please note that in response to COVID-19, mailed cards will be delayed as our team members work remote. For a more immediate notification, please provide the recipient’s email address in the honor gift section. Thank you for your understanding.

Choose a one-time amount

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☐ Indicate my donation in honor or in memory of someone

☐ See if your employer will match your donation

Employer donation matching is provided by our partner Double the Donation. You may receive an email
How An Integrated Marketing Strategy Can Change Everything

- Traditional distribution
  - Segmentation is useful for certain messaging
    - Legacy
      - Audience identification
        - Over 70 – ultimate estate plans
        - Over 50 – life transitions
        - Over 35 – children
    - Gift Planning
      - Per vehicle
        - QCD – 70’s
        - CGA – 60’s
        - CRT – 50’s
        - Stock’s – 40’s
How An Integrated Marketing Strategy Can Change Everything

• Marketing on calendar rhythm that serves institution and makes sense for public
• Make content relevant and expected
  • Take away discomfort
    • Gift planning can often be an after thought in donor conversations
      • Legacy gift discussions deferred because of unease
        • Make content about life and provision, joyful
• Moving beyond departmental mindset in marketing
  • Isolated and highly segmented audience
We were doing ok but still stood alone as a separate entity to other fundraising

Key to Success
- Educate
  - Serve first mindset
    - Offer insight, ways to save taxes, preserve wealth without an ask
    - Use norms – tell stories of other donors
- Integrate
  - Gift planning can be useful to every audience
    - If most wealth is in assets and most assets are taxed at liquidation
    - Then giving using assets can often offset capital gains and create charitable deduction
  - **Integration changed everything!**
- New Audience
  - Wide net donor file
  - Stake holders
How An Integrated Marketing Strategy Can Change Everything
Red Balloon League Case Study

• The Goals
  • One team
    • Annual
    • Major
    • Corporate
  • One Voice
    • Writing with same tone
    • Integrating theme in all communication
  • One Message
    • The branding carried over in all mediums
    • Team leaders collaborated on segmented piece timing
    • Global audience collateral had integrated gift planning and legacy messaging
    • Gift planning mailers included other ways to give
      • Instant annual opportunities
      • Major asset based planned gifts
      • Blended transformational
      • Legacy only
  • One Fundraising Finish Line
    • All teams worked together to hit the fundraising goals
How An Integrated Marketing Strategy Can Change Everything
Red Balloon League Case Study

• The Plan
  • April through June
    • All teams
    • All communication
    • All branded together
  • Multi-Channel
    • Website
    • Direct mail
    • E-newsletter
    • Solicitations
    • Gift planning
    • Legacy
    • Annual
    • Corporate Collateral
    • Main Foundation Stewardship Communications
    • Hospital Communications
  • Repeated
    • Carefully calendared
    • In partnership
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Red Balloon League Case Study

- Gift Planning Marketing Tools
  - Developed two tag lines that captured branding, impact, and next steps
    - A visual and memorable case for support
  - One for Legacy donors
    - Superheroes Use Will Power
  - One for Gift Planning donors
    - More Than One Way to Be A Hero

- Repeated in all Planned Giving messaging for campaign
How An Integrated Marketing Strategy Can Change Everything
Red Balloon League Case Study

- Gift Planning Marketing Tools
  - Customized Website
  - Worked with vendor to ensure on brand
  - Legacy - Superheroes use will power
  - Gift planning vehicle education
    - Explanations
    - Videos
    - Calculators
    - Stories
  - Pushed to site from electronic coms.
  - Gift facilitation links embedded
    - Make a will
    - DAF
    - IRA
    - Stocks
    - Beneficiaries
How An Integrated Marketing Strategy Can Change Everything
Red Balloon League Case Study

- Gift Planning Marketing Tools
- Customized E-newsletters
  - Instant recognition from branding to reinforce campaign
  - Message and personal voice
    - Personal
    - Repeating theme
  - Gift planning superpowers
  - Living Legacy
- Links
- Health System news
  - communicating immediate and enduring impact
- Gift method education
- Gift facilitation

Dear Friend,

As I write this month’s newsletter from my desk that looks out into a yard, miraculously blooming after the winter storms, I am reminded of this season’s superpower ability to bring life to our winter worn surroundings.

April also is the time at Children’s Health when it’s not unusual to see a caped crusader, a masked avenger or an everyday hero like you making a difference in the life of a child facing an illness or injury.

I’d like to introduce you to the Red Balloon League. The league is a band of team members, volunteers, families, researchers and donors fighting for the patients at Children’s Health. Together, we combine our individual strengths to make life better for children.

And this season, as we honor superheroes, did you also know there are various superpowers gift planning can offer you?

Weaving philanthropy into your life’s financial journey can become your secret weapon. Maybe you are looking to take one asset and like magic have double the outcome of giving to your heirs and to the cause you care about using a charitable remainder unitrust.
How An Integrated Marketing Strategy Can Change Everything
Red Balloon League Case Study

- **Gift Planning Marketing Tools**
  - **E-blasts**
    - Marketing advertisement
    - More Than One Wy to Be A Hero
    - Multiple ways to give
      - Stocks
      - QCD
      - DAF
      - Wills
  - **Links**
    - Education
    - Gift facilitation
    - Main campaign page
  - **Visual messaging**
    - Cohesive branding
How An Integrated Marketing Strategy Can Change Everything
Red Balloon League Case Study

• Gift Planning Marketing Tools
  • Postcards
    • Printed replica of eblast
    • Reinforcing message
    • Response cards
How An Integrated Marketing Strategy Can Change Everything
Red Balloon League Case Study

• Gift Planning Marketing Tools
• Printed Newsletters
  • Donor Stories
  • Calendar relevant vehicles
• Education
How An Integrated Marketing Strategy Can Change Everything
Red Balloon League Case Study

• Gift Planning Integrated Marketing Tools
  • Integrated messaging into main website
    • Free will making tool as a “gift’ when joining Red Balloon League
  • Annual Team Communication Integration
    • Traditional – send me legacy info on direct mail
    • Give by stocks on all digital solicitation
  • Major Team Communication
    • Created one pager on benefits of stock giving
      • Print and digital
      • Sent with personal letter or email to all donors on portfolio management
  • Corporate Team Communication
    • Point of Sale pushing to ways to give page
How An Integrated Marketing Strategy Can Change Everything
Red Balloon League Marketing Campaign

Join the Red Balloon League as we raise funds to defend patients at Children's Health.
redballoonleague.com

MY SUPERPOWER IS ____________________________ WHAT'S YOURS?

I'm joining the Red Balloon League to give our youngest league members a cape to recognize their bravery and strength — children like Jack, whose super hero story you can read here.

Your gift of any amount today makes you a member of the Red Balloon League and helps fund programs only available through donor support such as Child Life Services, social work, pet therapy and language access services. But every $20 you give before Cape Day on April 28 means another cape to give to a child here at Children's Health.

Children's Health would not be what it is without these programs — and we did not have these programs without you.

Give Online | Donate Stock

Donate Now

5 Reasons Stock Might be Your Smartest Gift to Charity

Be tax EFFICIENT.

Keep it SIMPLE.

Rebalance your portfolio.

Offset future capital gains.

Give BIGGER.

5 Reasons Stock Might be Your Smartest Gift to Charity

Give BIGGER.

Keep it SIMPLE.

Rebalance your portfolio.

On the cover and throughout this newsletter you will notice that the Red Balloon League logo is present. This logo is used to raise funds for Children's Health. You may see it on a variety of materials used for fundraising purposes, including but not limited to, flyers, banners, posters, and other marketing materials.
How An Integrated Marketing Strategy Can Change Everything Red Balloon League Case Study

- Gift Planning Integrated Marketing Tools
  - Foundation Communication
    - Headlines and Highlights
      - Tips you can use
        - Tax time
        - On brand, On calendar tips in 3-4 sentence call outs that link to webpage with more details
          - Tax planning tips
          - Legislation updates
          - Give This Not That
          - Your Best Stock Option?
          - January is the New December?
    - Printed Newsletters and Annual Report
      - Donor Stories with vehicle highlight
        - Tips and Tricks
How An Integrated Marketing Strategy Can Change Everything

Red Balloon League Case Study

YOU BECOME PART OF THE RED BALLOON LEAGUE
WHEN YOU:

$  
RAISE FUNDS
Fundraise individually or create/join a team. Participants can choose from a variety of programs at Children’s Health to designate their fundraising.

MAKE A GIFT
Support our superheroes with a recurring gift or a one-time gift of any size. Click below to see gift-giving options.

GIVE OTHER GIFTS
You can donate non-cash gifts like stock, life charitable remainder or through your IRA, which may offer financial benefits.

SHOP TO SUPPORT
can shop at participating businesses and brands donating a portion of sales back to Children’s health.

USING YOUR WILL POWER
Create a free will that includes Children’s Health in your estate plans and leave a lasting legacy for years to come.

MAKE A WILL

Proprietary and Confidential
How An Integrated Marketing Strategy Can Change Everything
Red Balloon League Case Study

• Follow Up
  • All marketing was pushing to our websites
    • Used analytics for gift officers to follow up with prospects
    • More in depth illustrations and briefs offered when appropriate
      • Staying on brand

• Results

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How An Integrated Marketing Strategy Can Change Everything

Integration Became Our Standard Practice
How An Integrated Marketing Strategy Can Change Everything
PG Growth - 2018-2021

- Revised gift acceptance policies
- Intentional integration of messaging
- Regular marketing on non-profit and annual calendar
- Education and gift methods to serve on donor journey
- Team efforts in prospect follow up
- 3-year increase of over 1000%

Percentage's year over year Totals cume year on year

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Thank you for the opportunity to be with you today

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Children’s Medical Center Foundation