

What's your two-year plan?

If you don't have a strategy for how to engage, acquire and retain donors, we're here to help.

Many of our clients know they need to do more with their fundraising and donor engagement programs. Smarter outreach. Better segmentation. Stronger ROI. But where do you start?

That's where Beth Interactive comes in. We meet with you and your team to discover absolutely everything about your fundraising program: from annual giving and capital campaigns to major gift outreach and stewardship. We also get to know *you* by learning about your community, your team, your biggest strengths and challenges.

Then, we build a customized two-year plan to serve as a comprehensive roadmap for your fundraising strategy and communications. You'll know what to do each month—who to talk to and what to say—in a way that is both sustainable and ensures growth year after year. (And if you need help implementing the plan, we're here for that, too!)

“This is incredible. You've created something that I have always wanted for our team! This gives us exactly the plan and programs we need to focus on for the next two years. You all are the best in the business.”

Erik Showalter, CFRE
President
Baton Rouge General Foundation

5

Average number of hours meeting with you and your team



79

Average number of slides in our findings presentation (we're really thorough!)



100%

Customized roadmap for your unique needs and situation



HEARD A NEED TO:

the groundwork for a program that can expand in future years—while keeping it simple in the short term.

your external community of support through a grateful patient program, donor acquisition and annual giving program that story better to your community, donors, patients, employees and providers.

ate a structured, proactive communications calendar that acts more unrestricted gifts to meet your \$1 million goal and the Foundation to respond to whatever comes next.

ate an elite Foundation with a best-in-class reputation that people are drawn to support.

"I want our donors to see and be amazed by what we're raising and what we're doing with their gifts."

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BETH INTERACTIVE 5

HIGH-LEVEL RECOMMENDATIONS

- 1** Create a structured fundraising/communications plan and calendar for your entire team to follow.
- 2** Build internal and external cultures of philanthropy by consistently sharing your stories and impact through consistent, beautifully branded and well-written materials.
- 3** Elevate brand and reputation through beautiful, high-touch and well-written materials (embrace use of Canvas).
- 4** Grow your pipeline and bring in new donors through a data-driven approach to Annual Giving and a Grateful Patient Program.
- 5** Learn into unrestricted appeals to prepare the Foundation to respond to whatever comes next.
- 6** Expand your audience with key constituencies like medical staff and patients.
- 7** Continue stewardship at an individual level for top donors and at a digital level for lower-level donors.
- 8** Press back involvement on events to include staff time for donor relations and stewardship.

FY22 + FY23 STRATEGIC COMMUNICATIONS PLAN

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KEY AUDIENCES

Communications in FY22 should include all of the below audiences with minimal segmentation at first. It's important to establish your communications channels and key giving programs this year—then expand into segmentation in FY23.



FY22 + FY23 STRATEGIC COMMUNICATIONS PLAN

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Strengthen your internal and external culture of philanthropy with great storytelling and consistent communications

Position yourselves as an elite, active foundation by example

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YEAR 1 RECOMMENDED APPEALS

Year-End Appeal (November/December)

Theme: Help us stand ready. We're removing real barriers to care.

Tactics: Direct mail and 5-part email series

Audience: Donors, lapsed COVID donors and engaged patients

Considerations:

- Use 225Gives as a peer-to-peer opportunity—leverage board relationships for new donor acquisition
- Add participation challenge or \$ match to spur participation and engaged donors for CYE appeal

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YEAR 1 APPEAL EXAMPLES

BETH INTERACTIVE 12

FISCAL YEAR COMMUNICATIONS CALENDAR

| Category | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|---|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Annual Giving | | | | | | | | | | | | |
| Acquisition | | | | | | | | | | | | |
| Physician Life Cycle (Acquisition, Stewardship) | | | | | | | | | | | | |
| Major Giving | | | | | | | | | | | | |
| Stewardship | | | | | | | | | | | | |
| Board Communications | | | | | | | | | | | | |
| Annual Giving + Patient | | | | | | | | | | | | |
| Manufacturing | | | | | | | | | | | | |

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EMPLOYEE GIVING + ENGAGEMENT

Impressions:

- Annual campaign is a funding anchor for the August
- Very strong participation
- Area Coordinators are successful campaign on
- Efforts at new employee orientation during post-lackluster—but new, in-person efforts have been
- Desire to elevate giving from transactional ("I'm") to understanding the Foundation's mission and year-round stewardship
- Looking for recommendations on how to inspire departments and employees

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ANNUAL GIVING

Recommendations:

- Direct mail program, apart from a tax letter in January
- most annual donors during 5-year capital campaign
- historically minimal return on digital solicitations because there no cultivation or build-up (e.g. Doctors' Day)
- option: Healthy donor giving to digital COVID asks, when more and transparency were key
- ing 3-5 solid campaigns annually—but we're concerned may be too much to take on in Year 1

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Goal: Build a sustainable Annual Giving program to drive a pipeline of unrestricted gifts.

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E-NEWSLETTER LAYOUT

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FY22 FOCUS AUDIENCES: PHYSICIANS

Impressions:

- Untapped audience with 700 providers
- Historically, physicians had very little awareness of the Foundation
- \$90,000 annually from fees every physician pays to practice, supports medical staff services fund held by the Foundation

Recommendations:

- Add key physicians to your portfolio for a Visionary Partner/major gift ask
- Talk to physicians year-round through physician newsletter
- Include physician group as a unique segment of annual campaign with a letter and email co-signed by CMO

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How do we start?

All plans start with our "Discovery Phase"—a series of Zoom calls or in-person meetings with your team to learn everything we can about your foundation. We build out a specific agenda in advance so you can invite key team members to attend only the sessions relevant for them.

What do I get?

We present our findings in a Zoom call to you and your team, plus provide a PDF of our full report with a 24-month calendar.

What happens next?

Our strategic communications plan will have a ton of recommendations—broken into work best completed by your team, and areas where you might prefer the expertise of an outside partner. Together, we'll identify where Beth Interactive could best provide strategic support and implementation, then deliver an itemized quote for your review prior to getting started.

Our strategic communications plans cover some or all of these topics:

- Acquisition
- Annual Giving
- Board Communications
- Capital Campaigns
- Digital Philanthropy
- Driving a Giving Pipeline
- eNewsletters
- Events
- Grateful Patient Programs
- Key Messaging Themes
- Major Giving
- Online Fundraising Platforms
- Planned Giving
- Print Communications
- Stewardship

You'll receive a final presentation PDF of our findings with actionable next steps!

Want to see what this could look like for you? Reach out today to start the conversation!

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