

Mounting Successful Planned Giving Cultivation & Stewardship Events



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Today's Agenda

- Strategies to make donor cultivation & stewardship events inspiring, memorable & well attended
- How to plan events that effectively engage, cultivate and steward legacy prospects, professional advisors, auxiliary members and volunteers
- How to effectively involve volunteers to help steward planned gifts
- Specific event examples: event components, photos, audience development techniques and outcomes

What makes successful stewardship & cultivation events?

- Meaningful donor engagement opportunities using creative event elements
- Targeted outreach activities to multiple audiences
- Mission driven & donor focused messaging
- Deepen relationships
- Diversify donor giving



Examples of Successful Planned Giving Cultivation & Stewardship Events

CPMC's Circles of Caring

Legacy Society

Spring Tea and Physician Presentation

- Donor centered and mission oriented messaging
- Legacy Donors
- Loyal Prospects

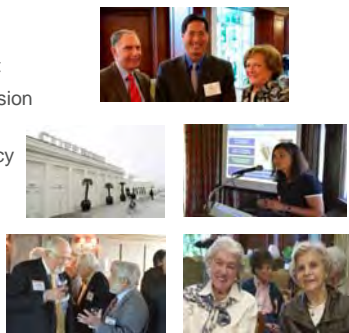


CPMC's Circle of Caring

Legacy Society

Event Outcomes

- Donor engagement
- Reinforces our mission
- Validates the importance of legacy gifts
- Creates a sense of donor community



CPMC's Retired Physician's Luncheon (Spring and Fall)

- Strengthen Ties for MDs and Spouses with CPMC
- Hear Latest Trends in Healthcare and Up to Date News
- Recognition and Appreciation for their Contributions
- Reinforce Legacy Message



Lucile Packard Foundation for Children's Health One Common Thread

- Luncheon celebrating LPCH's 20th anniversary
- Recognizing donors and volunteers for giving their time, talent, and treasure
- Integrated / multi-disciplinary event
- Carefully chosen speakers



Lucile Packard Foundation Retirement Community Events

- Hospital tour with presentation and lunch
- Identifying and engaging new donors/prospects
- Steward current donors
- Participants poised to spread message to their community (church, retirement home, etc)



We've come this far because of people who have cared - volunteers, staff, physicians, nurses, donors... and we'll make our dream a reality only with more of the same kind of support.
- Lucile Salter Packard

Lucile Packard Foundation
Lucile Salter Packard Society (LSPS)

Holiday Tea

- Stewardship event honoring society members
- Meaningful venue – a legacy of Packard's Allied Arts Auxiliary



Summer Event

- Broader audience includes prospects, major donors, advisors, volunteers
- Cocktails, hors d'oeuvres, and presentations
- Interdisciplinary effort




Lucile Packard Foundation
Professional Advisors Breakfast

- Annual educational/networking event
- Spotlights Packard's unique people and programs
- Presentation on estate planning or related issues
- Attracts new professionals for engagement
- Generates interest in touring the Hospital



After the Event

- Keep up the momentum!
- Follow up with prospects, donors, etc.
- Send your guests a thank you card
 - Include photos from the event
 - Remember those who RSVP'd but couldn't come



Building on Success... what we've learned

- Know your guests
 - What time is the event? Where is it?
- Educate your guests
 - Donors
 - Professional advisors
- Choose your stories wisely
 - The power of planned giving is its accessibility to all, so profile someone others can relate to

Questions?

Thank you for attending!

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