



PPP-LA: Advanced Case Study

***Alternative Planned Giving
Marketing Strategies: How to
Significantly Boost Your
Response Rate***

Matthew Rabin, Esq.

September 12, 2013



CEDARS-SINAI®
LEADING THE QUEST™

cedars-sinai.edu

Answer:
**The Planned Giving
Survey**
February 2013



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Survey Purpose

- Identify unknown planned gifts
- Identify planned giving prospects
- Update RE7 constituent biographic information

Roadmap for Presentation

- o Results
- o Costs
- o Process to create survey and identify target audience
- o Follow up
 - Data entry
 - Contacting respondents

Results

- Total Surveys sent mid-February 2012: **10,393**
 - Total Responses: **800** (7.7% of 10,393 sent)
 - **62** respondents (7.8% of 800 respondents) included Cedars-Sinai in their estate plan or are considering it
 - **19** respondents (31% of 62 respondents) included Cedars-Sinai in their will (one of these signed a declaration of intent)
 - **43** respondents (69% of 62 respondents) haven't yet included Cedars-Sinai in their estate plan, but wanted additional planned giving information

Results (cont.)

- Test vs. Control groups
 - Test group: half of **10,393** surveys sent to respondents offered a Starbucks cards for returning the survey
- **479** (59.9% of 800 total respondents) received Starbucks card offer
 - Starbucks card significant driver of response rate
 - Starbucks card referenced in cover letter
- **633** respondents (79.1% of 800 total respondents) agreed that they are promptly thanked for gifts
- **529** respondents (66.1% of 800 total respondents) feel Cedars-Sinai is responsive to requests

Results (cont.)

- Number of organizations respondents support:
 - **178** respondents (22.3%) support 1 – 3 organizations
 - **220** respondents (27.5%) support 4 – 6 organizations
 - **138** respondents (17.3%) support 7 – 10 organizations
 - **181** respondents (22.6%) support 11 or more organizations

Cost: approximately \$10K

- Printing cost: **\$2.3K**
 - C.I. Partners Direct
- Design: **\$7K**
- Starbucks cards: **\$1** 

Process to create Survey and identify target audience: 2.5 months

- Began creating mailing list in *November 2011*; completed review, including suppression review by major gift officers, by *mid-January 2012*
 - Survey Design: *6 weeks*, including internal form and content review by Cedars-Sinai's Communications team
- Data pull criteria for intended survey recipients:
 - All donors who have made *at least four gifts* since 1/1/1998, excluding Dues and Event Gifts
 - Any donor who made a gift to the *72-73 Campaign*
 - Any donor *who had already received*  Planned Gift
 - Members of the *Legacy Society*



Process to create Survey and identify target audience (cont.)

- Anyone who has been marked with a *prospect interest* of “Planned Giving”
- Anyone who has Matt Rabin listed as their *active assigned solicitor*
- Anyone who *received a planned giving mailing* in Spring 2009
- Any member of the *Board of Governors with a 5-year giving capacity at or above \$1M*

Process to create survey and identify target audience (cont.)

- *Excluded* from pull:
 - Board Members
 - Life Trustees
 - Faculty
 - Physicians
 - Employees

Process to create Survey and identify target audience (cont.)

- Cover Letters
 - Signed by CEO; or
 - Signed by Sr. VP for Development
- Distinction based on specific zip codes

Test Survey Packet



CONFIDENTIAL SURVEY

Ms. PG Survey Test
Address 1
Address 2
City, ST 99999-9999

8700 Beverly Boulevard, Suite 2416
Los Angeles, California 90048

A light blue decorative line that starts on the left, dips down in the middle, and then rises back up on the right, forming a shallow V-shape.



[Date]

[Name]
[Address 1]
[Address 2]
[City, ST Zipcode]

Dear [Salutation],

Your support of Cedars-Sinai helps us deliver the highest quality patient care that medicine has to offer. We are grateful for your partnership.

In return, we strive to be good stewards of our relationship with you, and we want to be sure that the information we have about you is accurate. So I hope you will complete and return the brief confidential survey enclosed. **Your reply is so important to us that we have reserved a Starbucks gift card in your name. We'll send it to you with our compliments once we have received your completed survey.**

The survey gives us a chance to verify your address and update our donor records, and it gives you an opportunity to share your opinions. Your feedback will help us serve you better.

Keeping the lines of communication open with you and other constituents is part of our overall dedication to excellence. It is gratifying to know that our efforts to provide superlative healthcare are appreciated: Cedars-Sinai was named among the best in 12 medical specialties in the 2011 *U.S. News & World Report* "America's Best Hospitals" edition.

To meet the growing healthcare needs of our community, we are constructing a new Advanced Health Sciences Pavilion, which will be one of the most innovative research and patient care facilities in the world. As we move forward, we will continue to draw strength and inspiration from your faith and confidence in our work.

Please take a moment to review and verify the address on the enclosed form, respond to the survey, and return the completed form to me in the enclosed envelope. Thank you.

Sincerely,

Need Signature

Thomas M. Priselac
President and Chief Executive Officer
Cedars-Sinai Health System

P.S. We value your relationship with us, and your privacy. All of the information you provide is strictly confidential. Thank you!



Please complete the information below to help ensure the accuracy of our records, and proper recognition of your support. We'll send you a Starbucks gift card as our thanks for completing the survey.

CONFIDENTIAL SURVEY

Prepared for:

**Joan and John Sample
Apartment 3G
123 Leafy Lane
Anytown, CA 12345**

Survey #[DONOR ID#]

1. Corrections or updates to my name and mailing address shown above are:

2. Home phone: (____) _____
3. Business phone: (____) _____
4. E-mail: _____
5. My age is: 21-35 36-50 51-65 66+ _____ (month/year)
6. What is your marital status? Married Unmarried Widowed
 Divorced Other
7. Do you have children? Yes No
8. Have you been a patient at Cedars-Sinai? Yes No
9. Why do you donate to Cedars-Sinai? *(please check all relevant boxes)*
 - I am a former Cedars-Sinai patient.
 - A family member or friend was a patient at Cedars-Sinai.
 - I want to support the following medical program priority at Cedars-Sinai:
 - Cancer Cardiology Surgery
 - Neuroscience Other: _____

10. Donors who let us know they have designated Cedars-Sinai in their will or estate plans are enrolled in the Cedars-Sinai Legacy Society for special recognition. Have you included Cedars-Sinai in your will or estate plans?
 Yes No
 If yes, have you completed a Cedars-Sinai declaration of intent form? Yes No
 If yes, name as you wish it to appear in the Cedars-Sinai Legacy Society:

11. Would you like to receive information about how to include Cedars-Sinai in your estate plans or receive lifetime income?
 Yes No
 Please call me at: _____ Please contact me by mail.
12. How many nonprofit organizations do you support?
 1-3 4-6 7-10 11 or more
13. Please rate the following:
 Cedars-Sinai thanks me promptly for my contributions.
 Agree Needs to do better Other _____
 Cedars-Sinai is responsive to my requests.
 Agree Needs to do better Other _____
 I'm happy with the volume of information I receive from Cedars-Sinai.
 Agree Need more Need less
14. Is there anything Cedars-Sinai can do to serve you better?

Thank you for taking the time to complete this survey.

If you have any questions, please contact Matthew Rabin, Esq.,
 Community Relations and Development, at 323-866-8149 or matthew.rabin@cshs.org
www.discoveringforlife.org/pgsurvey





PLEASE
PLACE
STAMP
HERE

Cedars-Sinai Community Relations and Development
File 1229
1801 Olympic Boulevard
Pasadena, CA 91199-1229

Printer to add barcode/verify with P.O.

Control Survey Packet



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Post Mailing

- RE7 entry for both recipients and respondents
 - Global data entry
 - Challenge: Batch size for Data Processing – ramped up to *25/time; 40 peak*
 - Attributes set for all questions responded to

Post Mailing: Follow-up

- Data pull output fields/criteria for follow-up mailings:
 - Constituent ID
 - Contact information for mailing (salutation, name, address)
 - Telephone numbers
 - One column for each for:
 - 1) *all DO solicitors* (constituent and spouse),
 - 2) *constituent codes* (Life Trustee and BoG)
 - 3) those that received a *Starbucks card*

Follow-up with Respondents

- Mailed letters within **3-4** weeks of surveys returned
 - Starbucks card:  ; and/or
 - Planned giving information for those who requested it; or
 - Thank you LTR for making a planned gift

Gift Planning: PG Survey Information

Q & A

Gift Planning: PG Survey Information

Thank you

Matthew Rabin, Esq.
323.866.8149
RabinM@cshs.org