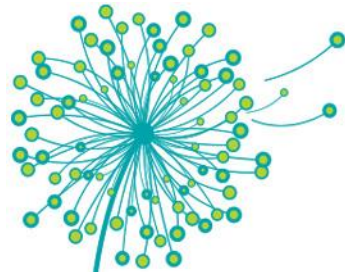


# Building an individual giving programme

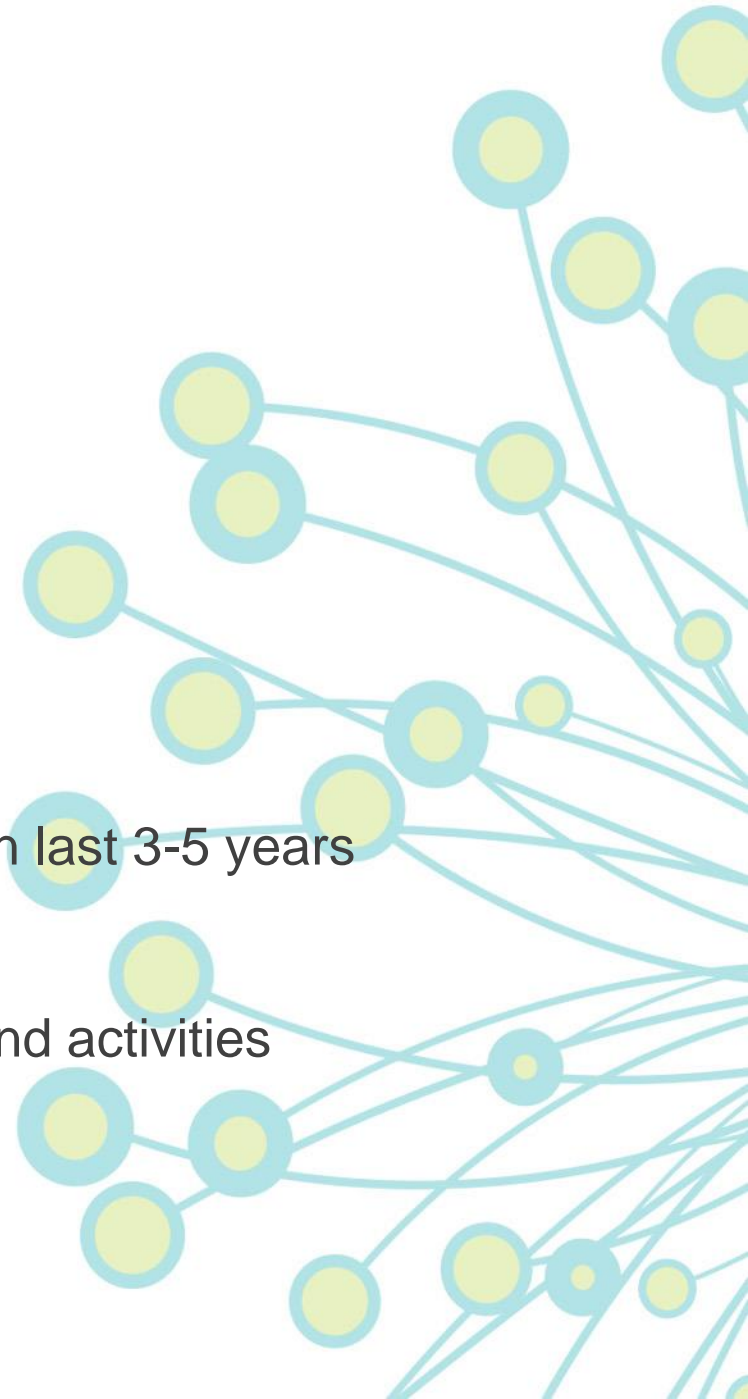


**Trinity  
Hospice**  
*Compassion and care*

**pebblebeach**  
consult • manage • deliver

# Background

- Previously:
  - Newsletter
  - Light up a Life as newsletter insert
  - Raffle
- Copy and design done in-house
- Data based on donors who had given in last 3-5 years
- Very limited segmentation
- Mainly used to promote latest events and activities
- Lacked engagement & story telling





# Developing our programme

- Started working with Pebblebeach in 2015
- Our first mailing hit the week after Olive Cooke
- Carried out a data audit, which identified:
  - Who are best donors are for Trinity, Brian House & who gives to both
  - Who we are best focusing on & targeting – where are we likely to get best response & return
- **We were mailing 20,000+ – reduced to average 8,000; saving £4,000 every time we mail out**

# Developing our programme

## RFV report for LUAL appeal selection

RFV Type: LUAL

RFV Reference: BHT-1609 (Trinity)

Date: 30/09/2015

Client: Trinity Hospice

Donor Type	a	b	c	d	e	f	g	h	i	j	k	Totals
	LUAL	RG (active)	GEN	IMO	LOT	RAF	MBOX	EVENT	COM	OTHER	RG(lapsed)	
Blue	64	7	66	56	7	8	0	36	25	118	0	387
Green	2537	155	1026	1288	260	25	0	25	13	0	0	5329
Orange	153	27	371	866	337	58	0	643	147	1	0	2603
Red	60	25	909	2514	106	377	0	9498	741	12252	2	26484
<b>Total Donors</b>	<b>2814</b>	<b>214</b>	<b>2372</b>	<b>4724</b>	<b>710</b>	<b>468</b>	<b>0</b>	<b>10202</b>	<b>926</b>	<b>12371</b>	<b>2</b>	<b>34803</b>
Engine Room	1565	166	560	390	231	21	0	1295	115	0	0	4343



# Developing our programme

- We recognised:
  - We needed to link the money & the mission – use case studies, tell stories & have stronger fundraising propositions
  - We wanted to develop direct mail & our individual giving income stream
  - We needed to use our database more to segment & personalisation
  - We didn't have the time, resources or skills internally to focus on it
  - We wanted to learn & test different things
  - We needed help!

# Our first two years

## 2015

- June 30<sup>th</sup> Anniversary Appeal
- September Newsletter
- October Light up a Life
- November Xmas Appeal

## 2016

- March Newsletter
- April Memory Tree
- June Matrons Summer Raffle
- October Light up a Life

**NOTE:** Not everyone receives every mailing

# Trusting the experts

## and holding our nerve

- Board of Trustees
- Clinicians buy-in & involvement
- Change in style of copy & design. E.g. Length of letters
- Specific donation amounts, linked to care
- Justifying the costs
- Testing, testing & more testing



# What we've tested

long term possibilities, not short term gain

- Increased number of communications & asks to donors
- Dedicated LUAL mailing
- Christmas appeal
- Care lead letter
- Patient/family case study
- Mix of Pebblebeach involvement – from full project to just data





# Income

## 2015

	Income	Profit
• 30 <sup>th</sup> Anniversary Appeal (W&C)	£32,624	£18,884
• Matron's Summer Raffle	£29,107	£17,439
• Newsletter	£2,961	-£6,617
• Light up a Life	£50,445	£39,641
• Christmas Appeal	£12,244	£2,131
<b>TOTAL</b>	<b>£127,381</b>	<b>£71,748</b>

## 2016

	Income	Profit
• Newsletter	£11,038	£2,293
• Memory Tree (Reg Giving)	£5,160	-£6,623
• Matrons Summer Raffle	£29,663	£18,904
• Light Up a Life	£59,002	£46,995
<b>TOTAL</b>	<b>£104,863</b>	<b>£61,569</b>

# Light Up a Life Growth

	<b>Income</b>	<b>Profit</b>
2013	£39,936	£38,876 (via newsletter)
2014	£40,894	£39,859 (via newsletter)
2015	£50,441	£40,141
2016	£59,002	£46,995

## Introduced

- Dedicated LUAL mailing, a month after newsletter
- Personalised segments based on recent gift type/support
- Personalised response form with previous dedications
- High value pack with higher donation suggestions

# 2017 activity

- Recruited 3 key new staff members:
  - IG coordinator
  - Marketing Manager
  - Database and Information Manager
- Regular Giving - £19,615 this year + £8,244 per year
- First ever gifts in wills mailing
- Online strategy supporting each activity
- Brian House's first ever Christmas appeal
- Bringing our learning in-house:
  - Copy
  - Design
  - Data selection

# Learnings

## from the good & the bad

- Donors like to hear from us
- Use of case studies & story telling really powerful
- Include engagement device in pack
- Refer to most recent gift in letter
- Re-activated previously considered lapsed donors
- At Christmas raffle worked better then appeal for Trinity
- Our newsletter can make a profit
- Data management – especially with 2 databases!
- Use of quirky donation amounts
- Need to incorporate appeals with online communications
- We've reduced our mailing files
- Printing & postage cost reduced - cover Pebblebeach costs
- Families want to share there stories
- **No complaints!**

# Thank you

**Linzi Young**  
Head of Fundraising

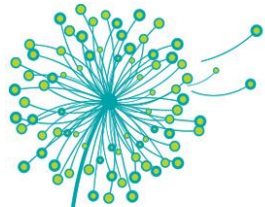
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**Trinity  
Hospice**

*Compassion and care*