



# Strategic Social Media





# Today's speakers



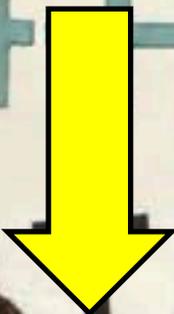
**Lori Bower**  
President



**Amy Bower**  
Director of Development

44 IS USA

THE FINE







No one knows  
who we are

We need more  
social media

A woman with long brown hair, wearing a light pink long-sleeved shirt, is sitting at a wooden desk. She has her head buried in her arms, resting on the desk, appearing to be exhausted or stressed. In front of her is a silver laptop, a pair of black-rimmed glasses, and some papers, including one with a blue bar chart. To her right, there is a white coffee cup and a white container. The background is a bright, out-of-focus office space with a window and some plants.

What am I  
going to post?



Only 10 people  
saw it???



There has to be a better way





Why are we using social media in the first place?



# Connect The Dots



No matter what you're trying to convince people to do – donate, volunteer, dream – the process is the same.



How do we illuminate or tap into a pain point?

How do we drive consideration?

How do we incite action?

How do we ensure delight in their decision?

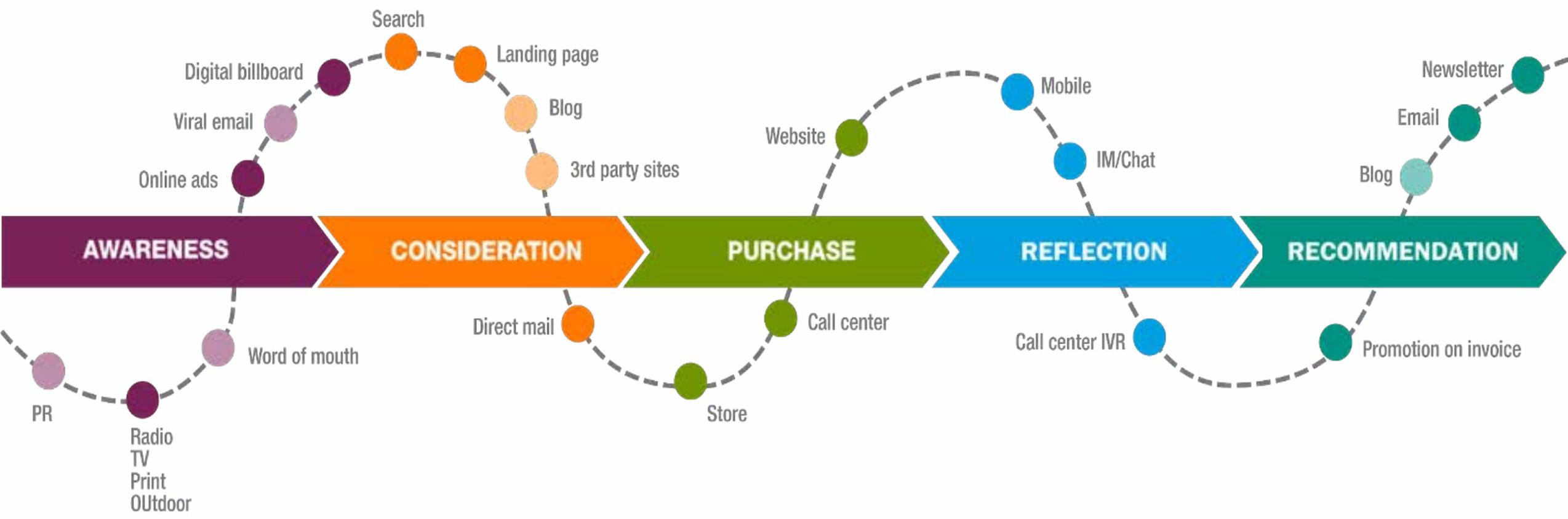
How do we drive positive recommendations?

AUDIENCE 1

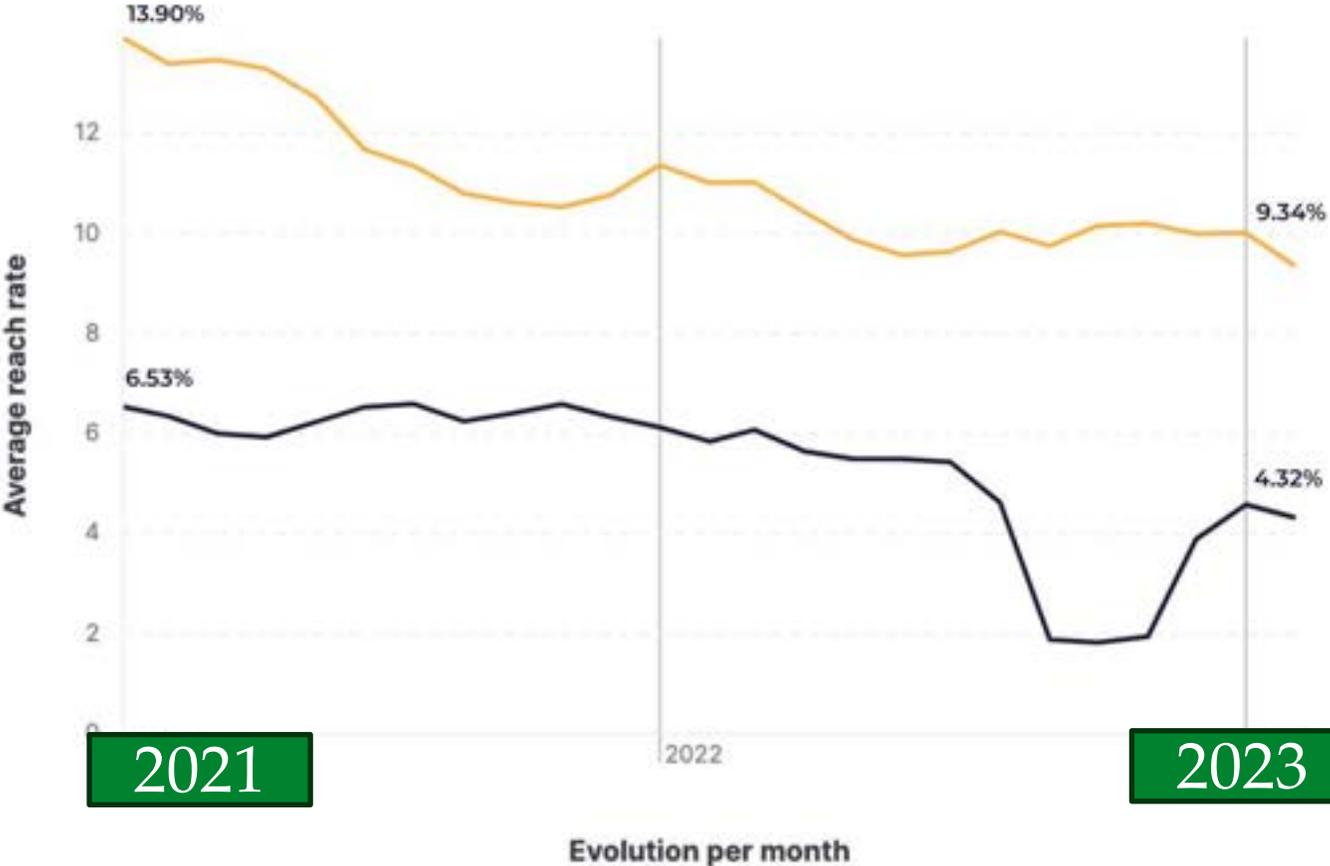
AUDIENCE 2

AUDIENCE 3

ETC.



# Depressing social post reach rates



**INSTAGRAM**  
**9.34%**

**FACEBOOK**  
**4.32%**

Source: Socialinsider data  
Data range: February 2021 - February 2023

# Ugly engagement rates



Source: Socialinsider data  
Data range: January 2022- December 2022

What do we do?

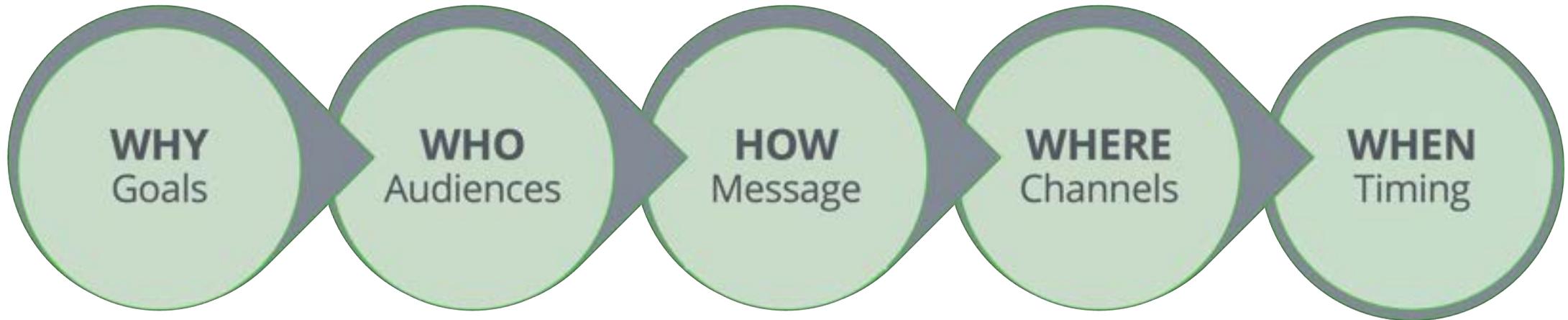




# Our Goals Today

1. Highlight strategies that drive action
2. Provide tools for making social media streamlined and purposeful

But first, let's take a step back to our goals



# WHY? Example Goals

	2024
<b>Planned giving</b>	<ul style="list-style-type: none"><li>• 3 new commitments secured</li></ul>
<b>New donor acquisition</b>	<ul style="list-style-type: none"><li>• Grow donor base by 20% (50 small gifts, 5 mid-tier, 2 corporate)</li></ul>
<b>Annual giving</b>	<ul style="list-style-type: none"><li>• Increase by 20%</li></ul>
<b>Mental health initiative</b>	<ul style="list-style-type: none"><li>• Generate \$200,000</li></ul>
<b>Imaging center capital campaign</b>	<ul style="list-style-type: none"><li>• Generate \$1.8 million</li></ul>
<b>Endowment</b>	<ul style="list-style-type: none"><li>• Increase by \$500,000</li></ul>

# WHO do we need to move to action?

Grateful patients/families

Current major donors

Current mid-tier donors

Mature community-minded women

Healthcare providers

Corporate/business

Community- and health-minded Millennials

Community partners

Government and policy leaders

Health grantmakers

Community organizations

Volunteers

AUDIENCE NAME:  
**MATURE COMMUNITY-MINDED WOMEN**



**Mary**  
**68**  
**Retired Teacher**

**What is their desire? What are they looking to accomplish?**

A way to give back to the community that will make a difference

**What do they value?**

- Local healthcare
- Confidence gift will be put to good use
- Women's and children's health
- Local economic development
- Impact for generations

**What problem are they facing? What's getting in their way?**

- Cost of redoing estate plan
- Complacency
- Want to give back but aren't sure how
- Internal conflict about children's share of inheritance

**Frustrations / Barriers**

- Constantly asked for money by various organizations
- Community organizations appear ineffective
- Lack of awareness of foundation
- Perception that you need a lot of money to be philanthropic

**Wants / Motivators**

- Desire to give back to the community
- Seeing that someone they know (or someone like them) is doing it
- Counsel from a professional advisor
- A change in family status or a routine review of estate plans
- A particular project of interest
- Sense of accomplishment and pride in doing volunteer or charitable work

**CURRENT**

**FUTURE**

**Fears**

- Getting involved in something that will be a huge time commitment but go nowhere
- Losing control over intentions with their donations
- Money being spent unwisely by recipient organizations
- Uncertainty over the best way to proceed
- Talking about death
- Backlash from children

**Aspirations**

- To live in a community that is thriving
- To feel good about doing their part
- To be recognized for contributions, of time, money and talents
- To have a community that will be thriving when their grandchildren are grown and beyond

# HOW do we incite action?

## EXAMPLE INITIATIVES

- Planned giving (Will Power)
- Annual appeal
- Endowment campaign
- Gala
- Match Week
- Women's health giving circle
- Mental health initiative campaign
- Caregiver/Grateful patient tribute
- Health summit
- Imaging center campaign

# Goals, Audiences, Initiatives

Initiatives	Grateful patients & families	Current major donors	Prospects – mature community-minded women	Healthcare providers	Board(s) and PFAC	Corporate & business leaders	Community- and health-minded millennials	Community partners	Government & policy leaders	Health grantmakers	Volunteers
Planned giving		3 gifts	2 gifts	2 gifts	25% make gifts		5 gifts				
Annual appeal		20% increase	\$XX new gifts	20% increase	20% increase						
Endowment campaign		10 gifts	3 gifts	2 gifts						\$100k match	
Gala		20% increase				\$100k sponsorships		Provide auction items			25 volunteers
Match Week	25 new donors					\$100k matching funds	100 new donors				10 volunteers
Women's health giving circle	20 new members		50 new members				20 new members				
Mental health initiative campaign		100 gifts	15 gifts	25% participation		10 gifts		10 orgs are ambassadors		\$200k gift	10 ambassadors
Caregiver/Grateful patient tribute	25 new donors										
Health summit		25 participants	25 participants	25 participants	75% participation	25 participants	25 participants	10 orgs participate	25 participants		10 volunteers
Imaging center campaign		100 gifts	10 gifts	25% participation		10 gifts	25 gifts			\$200k gift	10 ambassadors

# WHERE do we reach them?

Channels	Grateful patients & families	Current major donors	Prospects – mature community-minded women	Healthcare providers	Board(s) and PFAC	Corporate & business leaders	Community- and health-minded millennials	Community partners	Government & policy leaders	Health grantmakers	Volunteers
Personal call or meeting		X	X	X	X				X	X	X
Signage at hospital/clinics	X			X			X				
Mail	X	X	X	X	X			X	X	X	X
Email	X	X	X	X	X		X	X	X	X	X
SMS	X	X	X		X						X
Hospital Intranet or Messaging Platform				X							
Facebook (Page or Group)	X	X	X		X	X	X	X			X
LinkedIn						X	X				
TikTok							X				
YouTube/Digital Ads			X			X	X				
Newspaper			X			X			X		
Radio			X			X			X		
Streaming			X				X				



# Now let's talk social media



## Unpaid

Build community among  
“friends and family”

## Paid

- Drive particular actions
- Engage new audiences

# Realities to consider

- The platforms make you to pay to be seen beyond your most loyal followers
- For our clients, Facebook still outperforms other social channels **BY FAR**
- Raw/authentic content of people performs better. Do not overproduce.
- Long, meaty posts can perform extremely well
- Email outperforms social channels **BY FAR**



# Today's agenda

1. Lead Generation Strategy
2. Conversion Strategy
3. Flywheel
4. Group/Community Conversation Strategy
5. Social Calendar Planning and Management Tools



# 1. Lead Generation Strategy





# Example: Planned giving leads





**NOTE:**

We're playing the long game.  
This will not create a flood.



# Planned Giving – Plan on a Page

## Desired Outcomes

- 3 new legacy commitments per year

## Audiences

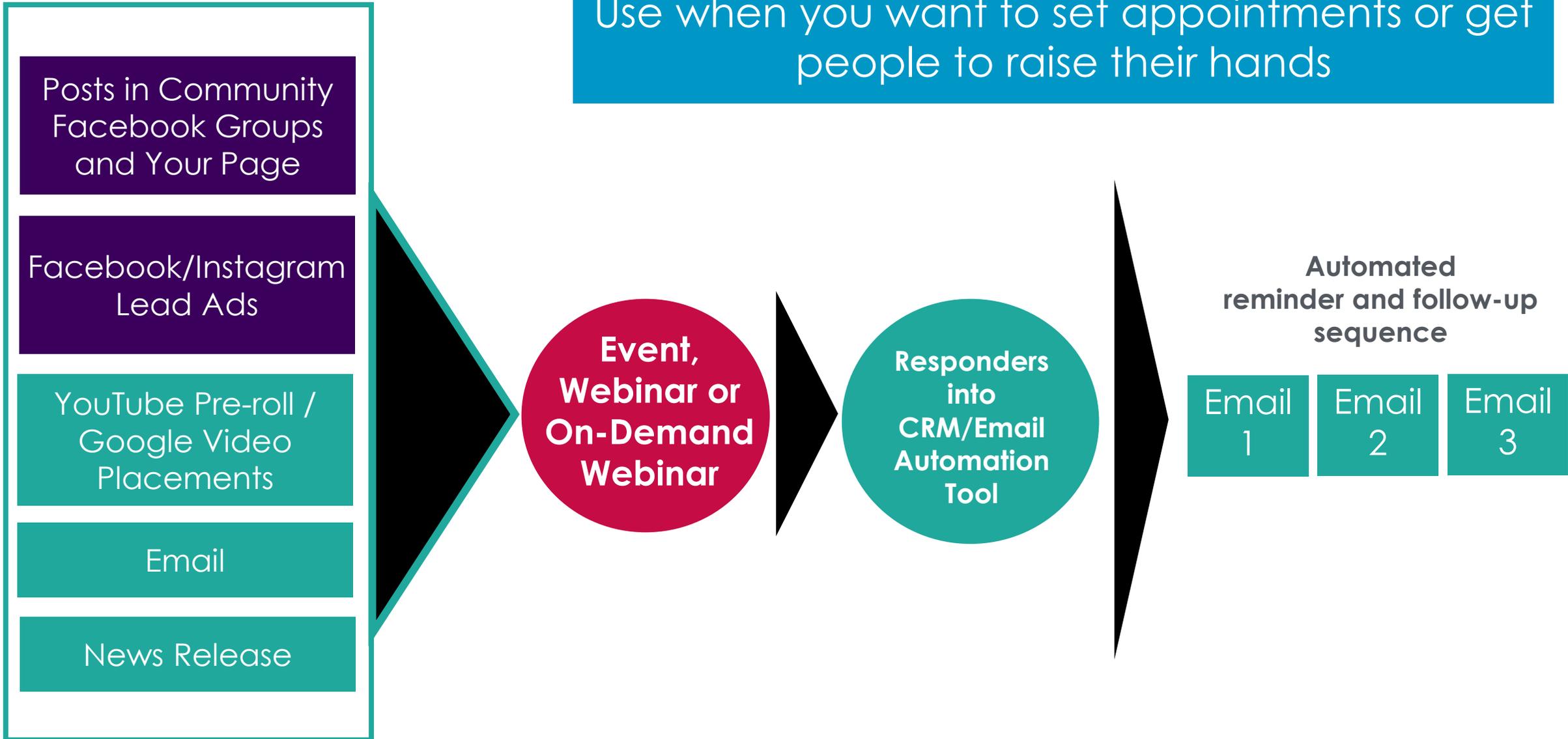
- Current female donors
- Prospective female donors

**Priority  
HIGH**

	"Aha" Moment / Awareness	Consideration	Action	Reflection	Recommendation
<b>OBJECTIVE</b>	<ul style="list-style-type: none"> <li>• Create an "aha" about how leaving a small slice (5% of estate) still leaves 95% for their family</li> <li>• Create an "aha" about the importance of strong local healthcare for our community</li> </ul>	<ul style="list-style-type: none"> <li>• Make them aware and demonstrate how you help them make a difference in [their area of interest]</li> </ul>	<ul style="list-style-type: none"> <li>• Ask them to give to an established fund, or create one of their own</li> <li>• Show them their friends are doing it</li> </ul>	<ul style="list-style-type: none"> <li>• Show appreciation and bring about delight through demonstrating the difference their donations are making</li> </ul>	<ul style="list-style-type: none"> <li>• Ask for a testimonial</li> <li>• Drive them to not only recommend the Community Foundation to their circle of friends, but to actively sell the idea</li> </ul>
<b>MINDSET / QUESTIONS</b>	<ul style="list-style-type: none"> <li>• I want to make sure my children are taken care of</li> <li>• I'm not sure I'll have anything left</li> <li>• I am thankful for the care I've received</li> <li>• Women deserve to have great healthcare</li> </ul>	<ul style="list-style-type: none"> <li>• How does it work?</li> <li>• What kinds of assets can I give?</li> <li>• What specifically do I need to state in my will/trust?</li> </ul>	<ul style="list-style-type: none"> <li>• Is foundation trustworthy?</li> <li>• Are they actually going to deliver what they promise?</li> <li>• What do I do next?</li> </ul>	<ul style="list-style-type: none"> <li>• Was this a good idea to do this?</li> <li>• I expect to be thanked/recognized</li> </ul>	<ul style="list-style-type: none"> <li>• Wow, everyone should do this!</li> </ul>
<b>KEY MESSAGES</b>	<ul style="list-style-type: none"> <li>• The future of our community depends on women having access to great healthcare for themselves and their families</li> </ul>	<ul style="list-style-type: none"> <li>• You have the power to make a difference for women and families in our community for generations</li> <li>• How it works, what you can give</li> </ul>	<ul style="list-style-type: none"> <li>• Testimonial / donor stories</li> <li>• Impact stories</li> <li>• Your friends are doing it (list)</li> </ul>	<ul style="list-style-type: none"> <li>• Thank you, we appreciate you</li> </ul>	<ul style="list-style-type: none"> <li>• Will you do a testimonial?</li> <li>• Will you share information with your friends/social media contacts?</li> </ul>
<b>CONTENT / MATERIALS</b>	<ul style="list-style-type: none"> <li>• Video: [story about an individual to exemplify point above]</li> </ul>	<ul style="list-style-type: none"> <li>• Planned giving brochure</li> <li>• Webinar/Video: Supporting women for generations – how an estate gift works</li> </ul>	<ul style="list-style-type: none"> <li>• Video testimonial</li> <li>• Written testimonials / photos</li> <li>• Donor list</li> <li>• Forms and instructions for donation/pledge</li> </ul>	<ul style="list-style-type: none"> <li>• Thank you note</li> <li>• Listing on website</li> </ul>	
<b>CHANNELS / ACTIVITIES</b>	<ul style="list-style-type: none"> <li>• Social media paid posts</li> <li>• Community social media groups</li> <li>• Op-ed or news story</li> <li>• Speaking engagements</li> <li>• Email to current donors</li> <li>• Annual report</li> </ul>	<ul style="list-style-type: none"> <li>• Web page</li> <li>• Email</li> <li>• Social media paid posts</li> <li>• Mailed letter</li> <li>• Annual report</li> </ul>	<ul style="list-style-type: none"> <li>• Web page</li> <li>• Social media paid posts</li> <li>• Annual report</li> <li>• Personal meeting</li> </ul>	<ul style="list-style-type: none"> <li>• Recognition:</li> <li>• Web page</li> <li>• Annual report</li> <li>• Personal note</li> <li>• Social media (after death)</li> </ul>	<ul style="list-style-type: none"> <li>• Email</li> <li>• Personal ask</li> </ul>

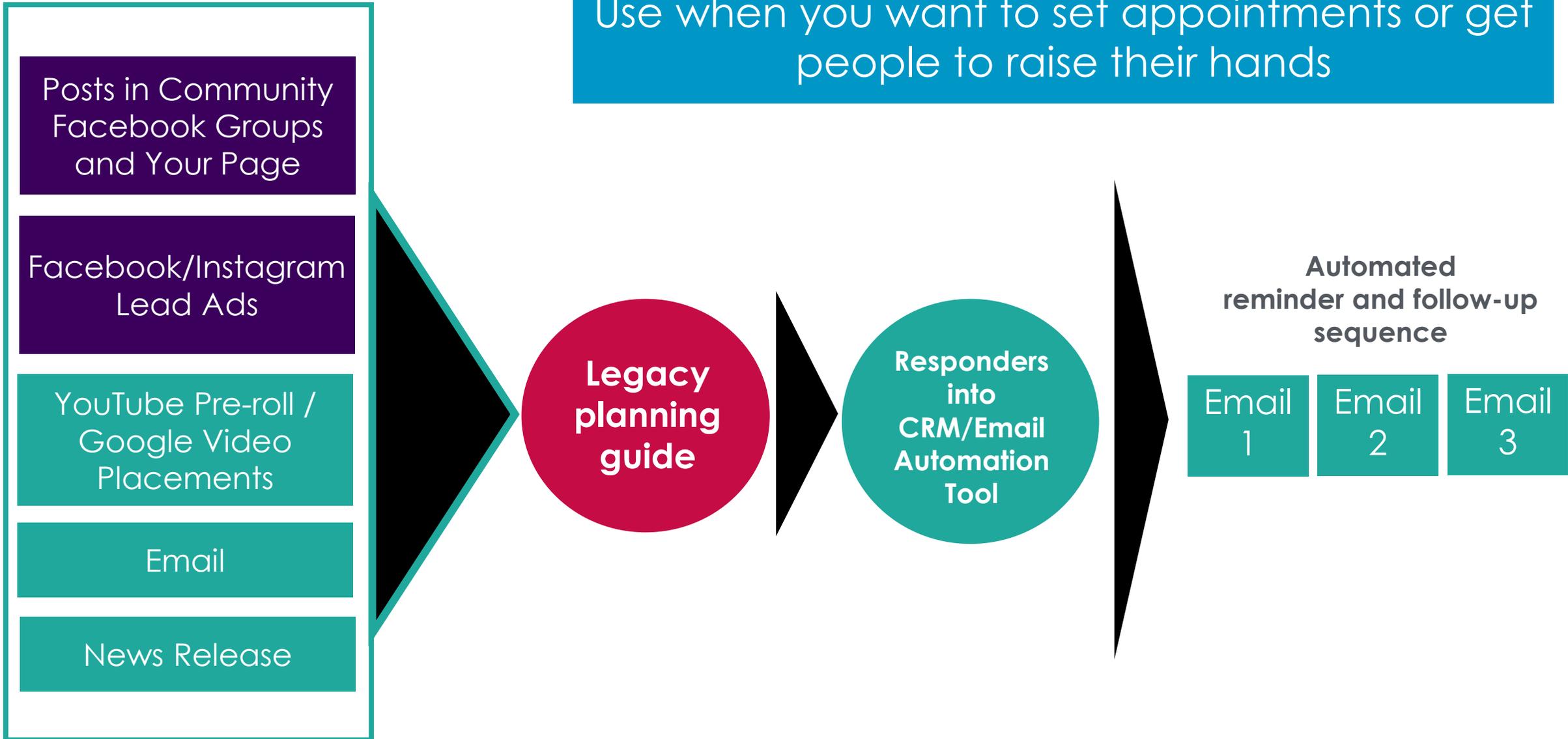
# Lead Generation

Use when you want to set appointments or get people to raise their hands



# Lead Generation

Use when you want to set appointments or get people to raise their hands



A set of 3 Facebook ads, for 4-6 weeks

Aha /  
pain point

How you  
help

Testimonial

Photo/quote and basic talking head videos work well



Western Kansas Community Foundation

Sponsored · 🌐



**\*\*FREE LEGACY PLANNING SERVICES\*\***

"In any family, anything could happen...You plan in the event those things would happen." Deanna Berry, Legacy Planning client.

Did you know the Western Kansas Community Foundation offers free legacy planning services? Our next available appointments are on September 9th... [See more](#)



FORM ON FACEBOOK

Free Legacy Planning

✓ Sign up

👍👎 29

Contact Information ⓘ

Confirm the details you'd like to share with us:

Full name

Enter your answer.

Email

Enter your answer.

Next

Privacy Policy

By clicking Submit, you request Facebook to send your info to Takanomi. Keep in mind that Facebook does not control how Takanomi will use your info. Facebook will also use your info subject to our Data Policy, including to auto-fill forms for ads. For more info you can contact the advertiser on their Page. [View Facebook Data Policy](#), [View Takanomi's Privacy Policy](#). [Go to Takanomi on Facebook](#).

Submit

Thanks, you're all set.

You can visit our website or exit the form now.

👏 You successfully submitted your responses.

View Website

“Boosting” has limitations

 **The Hands-On Guide to Surviving Adult Children Living at Home** ...  
September 11, 2020 · 🌐

Have your adult kids moved home to cope with the pandemic?



MONEY.COM

**The Pandemic Is Sending 20-Somethings Home Indefinitely, and Their Parents Are Payi...**

292 People Reached      9 Engagements      **Boost Post**

Boost Post



OBJECTIVE

What results would you like from this post?

- Send people to your website**  
Link clicks - From \$1 a day
- Get more people to react, comment and share**  
Post engagements - From \$1 a day

SPECIAL AD CATEGORY



Ads for credit, employment or housing offers. [Learn More.](#)

AUDIENCE

- People you choose through targeting [Edit](#)

Location - Living In United States

Age 18 - 65+

- People who like your Page
- People who like your Page and their friends

[Create New Audience](#)

Automatic Placements (Recommended)



ON

Use automatic placements to maximize your budget and help

show your ads to more people. Facebook's delivery system will

Preview: [Mobile News Feed](#)



**The Hands-On Guide to Surviving Adult Children Living at Home**



September 11, 2020 ·

Have your adult kids moved home to cope with the pandemic?



MONEY.COM

**The Pandemic Is Sending 20-Somethings Home Indefinitely, and Their Parents Are Payi...**



By clicking Boost, you agree to Facebook's [Terms & Conditions](#) | [Help Center](#)

Cancel

Boost

**Boost Post** ✕

Preview: **Mobile News Feed** ▼

**OBJECTIVE**

What results would you like from this post?

-  **Send people to your website**  
Link clicks · From \$1 a day
-  **Get more people to react, comment and share**  
Post engagements · From \$1 a day

**SPECIAL AD CATEGORY**

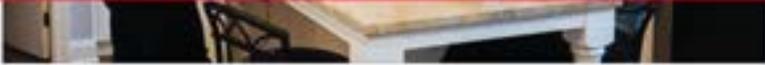
Ads for credit, employment or housing

**AUDIENCE**

- People you choose through targeting
  - Location - Living in United States
  - Age 18 - 65+
- People who like your Page
- People who like your Page and their friends

[Create New Audience](#)

**Automatic Placements (Recommended)**  ON  
Use automatic placements to maximize your budget and help show ads to more people. Facebook's delivery system will

  
MONEY.COM  
**The Pandemic Is Sending 20-Somethings Home Indefinitely, and Their Parents Are Payi...**

By clicking Boost, you agree to Facebook's [Terms & Conditions](#) | [Help Center](#) Cancel Boost

Awareness	Consideration	Conversion
 Brand awareness	 Traffic	 Conversions
 Reach	 Engagement	 Product catalog sales
	 App installs	 Store visits
	 Video views	
	 Lead generation	
	 Messages	

# zapier\*



...and hundreds more!

# General Benchmarks

- >1% link click
- < \$30-\$50 per lead

<b>Results</b>	
On-Facebook Leads	5
Cost per On-Facebook Lead	\$20.00
Amount spent	\$100.00
	Lifetime budget: \$100.00 USD 
Reach	1,930
Impressions	4,759
Purchase ROAS (return on ad spend)	0.00
Frequency	2.47
Unique clicks (all)	295
CPC (cost per link click)	\$1.69

## Results

On-Facebook Leads	5
Cost per On-Facebook Lead	\$20.00
Amount spent	\$100.00
	Lifetime budget: \$100.00 USD 
Reach	1,930
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## Demographics

Aug 1 - 31

All

Women

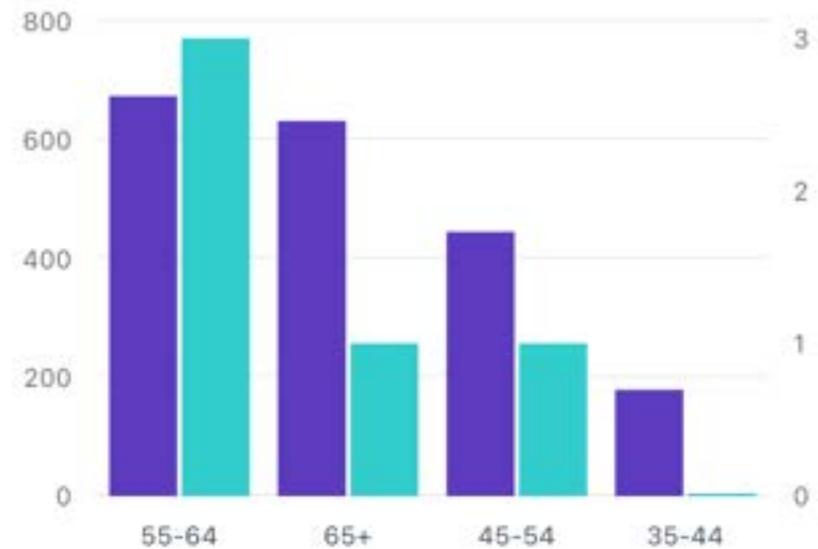
Men

1,930

People Reached

5

On-Facebook Leads





## 2. Conversion Strategy

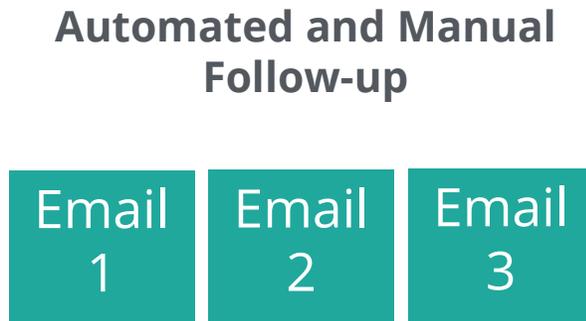
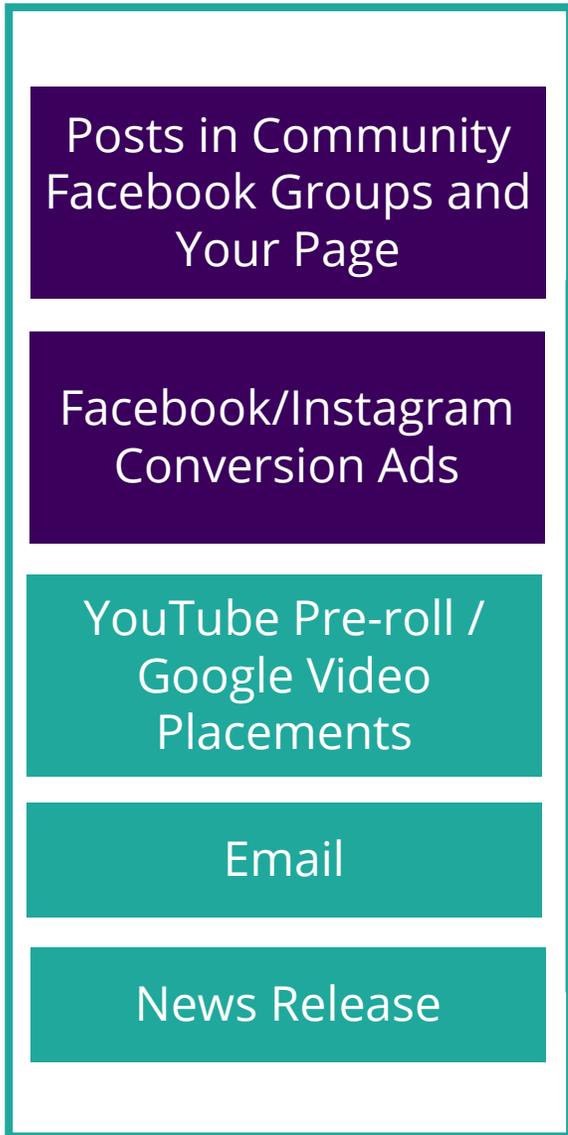


# Example: Match Week



# Conversions

Use when you want people to take an unassisted online action



- Personal thank you
- Ask friends to donate
- Results email / celebration

## Awareness

## Consideration

## Conversion

 Brand awareness

 Traffic

 **Conversions**

 Reach

 Engagement

 Product catalog sales

 App installs

 Store visits

 Video views

**Prioritizes people who engage or seem to express interest**

 Lead generation

 Messages





### AD SET: Define your audience, budget and schedule

Campaign

Objective

Ad Set

Conversions

Audience

Placements

Budget & Schedule

Ad

Format

Media

Page & Links

#### Conversions

Get people to take valuable actions on your website, such as watching a demo or purchasing a product. Use the Facebook pixel to measure and optimize ads for conversions.

Conversion

Donation Submit Button or Thank You Page

- Webinar Registration  
Pixel: Andrea Sodergren Vahl's Pixel
- Facebook Ads Free Course  
Pixel: Andrea Sodergren Vahl's Pixel
- Facebook Page Checklist optin  
Pixel: Andrea Sodergren Vahl's Pixel
- Lead
- [+ Define a New Custom Conversion](#)

#### Audience

Define who you want to see your ads

Create New

Use

Prefill with options from your last ad set

Custom Audiences

Add Custom Audiences or Lookalike Audiences

Exclude | Create New

Locations

Everyone in this location

United States

## Ads & Timing

Run a set of 3 ads for the entire giving span

**Aha /  
Pain Point**  
Provocative story

**How it works**

**Testimonial**

# 3. Flywheel



Girl Scouts - Follow

January 8 · 🌐



This is NOT your average camping trip... 🏕️ these Knoxville Girl Scouts were truly 'roughing it' for their overnight Survival 101 experience where they learned how to treat wounds in the wilderness, build survival shelters, create bedding from natural materials, and start fires with wet materials so they can dry off after getting drenched in a stream. 🔥 More photos in the comments!



👍❤️ 5K

419 comments 261 shares



### Girl Scouts's Post



Author

Girl Scouts

Survival shelters



Like Reply 36w

↳ 1 Reply

👍❤️ 174



Author

Girl Scouts

outdoor wound care



Like Reply 36w

↳ 2 Replies

👍❤️ 110



Author

Girl Scouts

creating bedding



Write a comment...





# Example: Match Week Thunderclap



The screenshot shows the Microsoft Word interface for creating a meeting invitation. The title is "Share Donate Day Post". The start time is set for Friday, 10/14/2022, at 10:00 AM in Central Time (US & Canada). The end time is set for Friday, 10/14/2022, at 10:15 AM in Central Time (US & Canada). The "Time zones" checkbox is checked, and the "Make Recurring" option is available. A "Room Finder" button is located at the bottom right of the invitation form.

## Help us spread the word about Donate Day!

### Here's what to do

- ✓ Go to this post: <https://www.facebook.com/groups/428597240651523/posts/1993102170867681>
- ✓ Like this post
- ✓ Comment on this post
- ✓ Share it to your timeline with some commentary. You can simply say, *"I'm supporting our community on Donate Day by giving to local nonprofits. It's an easy way to give to multiple nonprofits at the same time, AND they get matching funds from the community foundation."*
- ✓ Share it in Facebook groups

# 4. Groups and Communities



# facebook®



Pages



Groups

Posts from Facebook groups are shown more than posts from Facebook pages



# What could be a Facebook group?

Giving circles

Gala planning  
committee

Volunteers

Board or  
committees

Community  
partners

Ambassadors  
or campaign  
champions

Healthcare  
summit

## Email

- One-directional
- Responses get lost
- Conversation difficult



## Facebook Group

- Conversing in a group
- Prioritized over page posts
- Subgroups available
- Events
- Share files
- Engagement insights

# Leverage “OPA’s” – Other People’s Audiences

**McPherson Community**  
Public group · 6.01 following

There is still time to donate for the McPherson County Council on Aging during Match Week with multiple ways to donate the Foundation is accepting donations through 11:59 p.m. tomorrow evening.

**Match Week**  
TOGETHER WE DREAM. TOGETHER WE SUCCEED.  
February 28 TO March 4

A week of fulfilling dreams for our local nonprofit endorsements.  
The more you give, the more your favorite organizations get from our \$100,000 matching funds.

**Public Right To Know**  
Private group · 10.31 members

**Match Week**  
TOGETHER WE DREAM. TOGETHER WE SUCCEED.  
February 28 TO March 4

A week of fulfilling dreams for our local nonprofit endorsements.  
The more you give, the more your favorite organizations get from our \$100,000 matching funds.

# 5. Editorial Calendar



# Social Media Calendar

Items in yellow are priorities for boosting/promoting (selected by things that seem the most important, as well as spreading things out over the year).

	Legacy / Estate Planning	Farmers / Agribusiness	Grant App Reminders / Winners	Power of Unrestricted Funds: Grant Profiles	Donor Stories - How People Give Back	Match Day / Agency Funds	Newsletter Articles
	Videos and links to information about different aspects of estate planning and leaving a legacy.	Specific messages targeted at the farmer / agribusiness audience	Visual reminders of deadlines, and links to news releases of winners	Through photos and/or video, tell about the grant projects CF has funded	Share the stories already written for newsletters and annual reports, demonstrating the different kinds of ways people give back	Promotions for the event	Post individual newsletter stories, linking to website (2 per week)
19-Feb			Reminder				Article 1 Article 2
26-Feb	Estate Planner Video		Reminder				Article 3 Article 4
5-Mar					Donor Story		Article 5 Article 6
12-Mar		Estate Planner Agribusiness Clip 1		Grant project profile			
19-Mar	Giving appreciated stock						
26-Mar		Estate Planner Agribusiness Clip 2					
2-Apr				Grant project profile	Donor Story		
9-Apr	Estate planning appointments available					How (and why) to start an agency fund - video?	
16-Apr			Winners				
23-Apr	Thank you Legacy Society members (list)			Grant project profile			
30-Apr	Giving land -- how it works					Meet the agencies that have funds at CF (list/link) - your organization could start one also	

# Publishing Tools





# Hey Orca Sprout CRMs

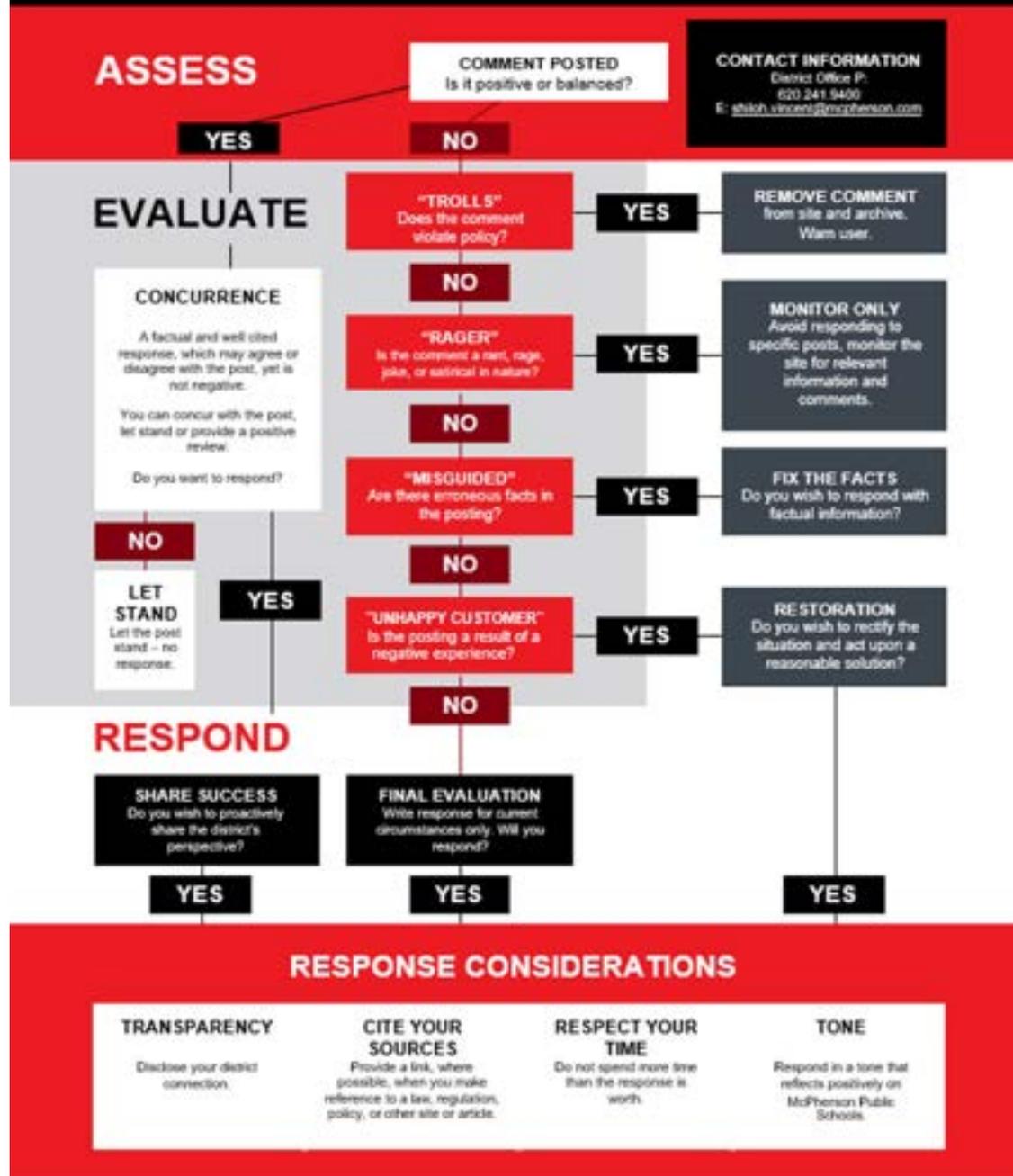




# Dealing with Trolls



Should I respond online to comments posted on a McPherson Public Schools page?





# Q&A



# JOURNEY TO YES

A blueprint to transform communications and achieve a new level of **impact**.

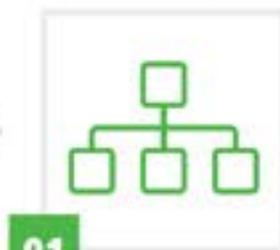
 BOWERCOMM



## DISCOVER



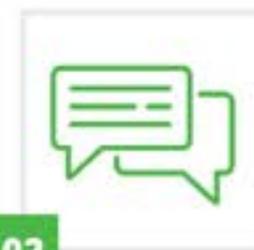
### GET ORGANIZED



01



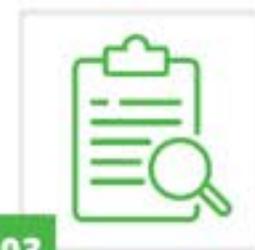
### INTERVIEW STAKEHOLDERS



02



### REVIEW PEERS/COMPETITION

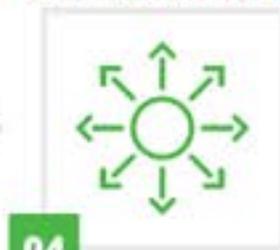


03

## DEFINE



### OUTLINE OPPORTUNITIES



04



### DEFINE BRAND FOUNDATION



05



### PREPARE TO VISUALIZE MESSAGE

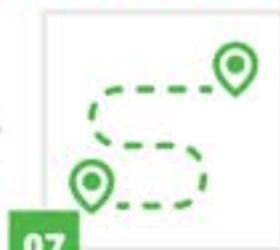


06

## DEVELOP



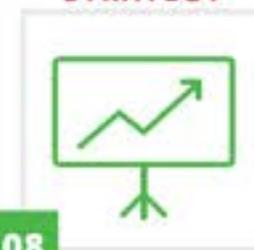
### DEVELOP AUDIENCE JOURNEYS



07



### DEVELOP COMMUNICATIONS STRATEGY



08



### DEVELOP DETAILED PLAN



09



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