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**OBJECT: 4-year brand equity roadmap**

**Objective:** Build a clear and compelling brand that drives lasting engagement, amplifies the Foundation's communications impact, and builds sustainable momentum across all donors, partners, and community relationships.

**YEAR 1: SET THE FOUNDATION (2025)**

**CORRESPONDS TO "PHASE 1: REJUVANATING THE FOUNDATION'S BRAND IMAGE"**  
(See our March 31 proposal.)

**Objective:** Define a simple, inspiring, and distinctive brand narrative and identity that rallies both internal and external stakeholders — laying a strong foundation for future campaigns, fundraising efforts, and organizational visibility.

**Key actions**

- Brand positioning and narrative development
- Visual identity redesign and brand toolkit
- Website skinning with refreshed messaging
- Internal alignment sessions (staff, board)

**Key outcomes**

- Shared clarity and ownership of the brand
- A more professional, vibrant identity
- Clear sense of who we are — and why we matter (above hospital "projects")
- Messaging consistency begins to take root

**Experts to involve**

- Brand strategist
- Copywriter
- Graphic designer
- Web/UX designer and developer



## YEAR 2: SEGMENT, LAUNCH, AND BUILD AWARENESS (2026)

**Objective:** It's where brand building meets campaign ignition. Introduce the brand publicly, define key donor segments, and activate early campaigns.

### Key actions

- **Internal** brand rollout (training, templates, playbook)
- Develop a **communication strategy** to prioritize **donor segments** and objectives
- Create a **content strategy** aligned with the comms strategy
- **Publicly launch the new brand narrative** with an impact-driven, awareness campaign

### Key outcomes

- Increased brand awareness across priority audiences
- Clear understanding of donor types and how to engage them
- Stronger emotional connections through brand narrative

### Experts to involve and estimated fees (to be validated)

- Communications strategist: 10-15K
- Content strategy, SEO/SEM expert: 7-10K\$
- Creative agency / campaign creative lead: 30-40K\$
- Media planner or digital marketing consultant: 12-15K\$
- PR strategist: 7-10K\$

## YEAR 3: DEEPEN RELATIONSHIPS & DRIVE GIVING (2027)

**Objective:** turn brand momentum into sustained engagement and giving.

### Key actions

- **Review and adjust** communications planning based on results from previous year
- **Tailored donor journeys** based on segments, and **develop comms tools** (legacy programs, monthly giving, etc.)
- Thematic **fundraising campaigns** (one per segment or 1-2 per year)
- **Evergreen content** & community storytelling (videos, newsletters, updates)
- **Start tracking engagement** and conversion per segment

### Key outcomes

- Increased donor loyalty and recurring support
- Brand story begins to live through action and repetition
- Team builds habits around audience-first thinking and brand storytelling
- Segmentation becomes operational in day-to-day fundraising

#### Experts to involve

- Communications strategist: 7K
- Content, SEO/SEM expert: 7K
- Graphic design + copy writer (for the development of the tools): 12-17K
- Creative agency / campaign creative lead (fees per campaign TBD)
- Media planner or digital marketing consultant (fees per campaign TBD)

#### YEAR 4: EXPAND REACH & REPUTATION (2028)

**Objective:** reinforce the Foundation as a credible, beloved brand in the healthcare community.

#### Key actions

- **Review and adjust** communications planning based on results from previous year
- **Deepen partnerships** (local businesses, health orgs, corporate sponsors)
- Launch community **ambassador program**
- **Co-create campaigns** with hospital teams (research, staff, innovation)
- Contribute **thought leadership** (publications, panels, blog, PR, advocacy content, etc.)

#### Key outcomes

- Partnership & outreach strategy: more strategic partnerships and in-kind support
- Reputation beyond donors, greater public recognition and media traction (as a voice in healthcare)
- New audiences reached through community engagement (public engagement tools)

#### Experts to involve (TBD)

- Partnerships lead
- Outreach coordinator
- Blog writers
- Event/activation strategist
- Content and media strategist
- PR consultant

## A WORD ON MEDIA SPENDING

**Media buys are needed from Year 2 onwards to build awareness and engage donors and key stakeholders.** That said, for a hospital foundation with limited means, media budgets will likely be modest, highly targeted, or in-kind.

- Digital-first media strategy (Facebook, Instagram, YouTube pre-roll, search ads)
- Possible hyperlocal print or radio spots depending on donor base
- Targeted boosting of storytelling content and campaigns

**Recommendation to invest in high-visibility, locally relevant media (OOH, print), at least for the launch campaign to create momentum.**

Recommended media budget ranges

Year	Recommended media budget	Notes
Year 1		Mostly strategy year; possibly a small spend for soft internal announcement or testing
Year 2	TBD	Public brand launch campaign, video distribution, social media boosts (+SEM)
Year 3	TBD	Fundraising campaigns, donor acquisition, monthly giving
Year 4	TBD	Community campaigns, advocacy, partnerships

The following exercise for the Montreal's West Island community is for illustrative purposes only. We are uncertain as to which media strategy will be most relevant and effective at this stage. We may, for example, want to connect with the business community and the public of Greater Montreal. The media strategy will be shaped by the communications strategy.

See below a preliminary estimate and suggested media for a 6-to-8 week campaign to reach the West Island community.

- **Out of home: 15-25K**
  - There are very few large size billboards in the Montreal West Island. Most of them are located on highways (20, 40) before Des Source, they reach travellers from all Montreal area and beyond and are relatively expensive.
  - 10'x20' posters: two road-side posters are located on Boulevard St-Charles at Oakwood in Pierrefonds and could be purchased individually or simultaneously to increase impact ([80698](#) and [80699](#)).
  - Bus shelters: as this format is relatively small (4'X6'), ensure high visibility with a minimal amount of advertising surfaces in a radius which will allow campaign to stand-out.

- **Digital display and video:** 12-15K
  - Geotargeting: target residents in a radius | emphasis on adults 55+.
  - Geofencing: retarget patients and visitors who entered the Hospital recently.
- **Social Media:** 12-15K
  - Geotargeting: target residents in a radius | emphasis on adults 55+.
- **Newspapers:** 7-10K
  - Print insertion can promote cause, inform on goals and serve as a call to action for donation with printed QR codes.
  - Smaller formats (1/2, 1/3 or even 1/4 page ads) usually offer enough space to promote campaigns.
    - The Suburban | City & West Island Edition or Inserts distribution
    - The West Island Gazette | part of the Montreal Gazette
- **Radio CJAD:** 5-10K
  - [Ask the experts](#) : 35 minutes interview on a topic of interest – must be approved by station's programming team.
  - Very efficient to reach the 55+ population.
  - Donation campaign – radio is a great call to action and helps broadcast multiple messages.
  - Production can be handled by stations at no charge.

