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# INTENTIONAL LEGACY DEVELOPMENT: CREATING PRODUCTS OF VALUE FOR CLIENTS AND SOCIETY AT LARGE

## Case Study:

How great companies think differently:  
Inheritance of Hope Thought Leadership

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This case study is for:

- ✓ Independent Practitioners / Private practice
- ✓ Nonprofit Organizations
- ✓ Nonprofit and Government Consultants
- ✓ 100% Online Conferences, Courses, Webinars and Workshops

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## INTRODUCTION AND SITUATION BACKGROUND

Every year, an average of 700,000 children find themselves in the situation where a parent is fighting a life-threatening cancer. That's just one illness.

**One in twenty children under the age of 15 will face losing a parent from a terminal illness.**

Inheritance of Hope was founded by Kristen and Deric Milligan during a time when their family was battling a tremendous loss. For nearly a decade, Kristen, with the help of Deric and their three children, bravely fought a rare form of liver cancer. It was during this challenge that they realized there were no programs available to help young families who were facing the loss of a parent. Together, they founded Inheritance of Hope to meet as many needs of young families as possible.



The organization provides literature, college scholarships, an on staff counselor, and tools to help families navigate the time of great loss. The signature offering is the Legacy Retreats where they bring many families together, who are connected because of their situation. The families share an understanding about what they are going through, so they don't feel they are alone. The Legacy Retreats provide families with time set aside to enjoy each other, have fun and create lasting memories.

**“Legacy Retreats are a time to put away the doctors, and the bills, and the worries of the future, and just enjoy each other.”**

**~Kristen Milligan**

The Inheritance of Hope gives dying parents the opportunity to see their family being taken care of, to see their family more prepared, and to be intentional about the legacy they leave behind.



### KEY CHALLENGES

The Inheritance of Hope was founded in 2007 as a 501 (c) (3) nonprofit. It was initially supported by the sales of books authored by Co-founder Kristen Milligan. The fund development initiatives have since grown to include national fundraising, special events, grants, corporate contributions, in-kind donations, and memorial donations. The vision of the company is “Every Family Deserves a Legacy” and moving forward the leadership endeavors to provide greater product offerings and services to young families facing the loss of a parent.

Since 2008, 221 families from 38 states have attended a Legacy Retreat led by the Inheritance of Hope. In an effort to fulfill the mission of assisting more families, expanding services, and positioning the nonprofit as a thought leader, the organization leaders faced two key challenges.

- **How would they be able to provide families in need located all over the United States with products and services of value?**
- **What are the greatest informational needs for families during this time and what is the best way to provide the information?**

### SOLUTION

With a strategic plan supported by a strong fund development program, the team actively seeks opportunities that enable them to partner with others on growth initiatives. The Legacy Retreat program is a clear example with its partnership with Double Tree Hotel.

Eric Miller, Inheritance of Hope’s director of marketing, identified a grant opportunity with iCohere called Serving Those Who Serve Others. Launched in 2014, the grant provides pro-bono virtual conferences to two nonprofit organizations each year. Using the grant partnership with iCohere, the Inheritance of Hope team developed the Legacy Lunch program.

**The Legacy Lunch webinar series brings families in need together with high quality speakers and subject matter experts covering a variety of important topics. Using a webinar platform enables the organization to reach a broader number of families and to create organizational assets that can be reused for many years.**



## RESULTS

<b>CHALLENGES</b>	<b>SOLUTIONS</b>
Increasing the number of families served and expanding product offerings.	<ul style="list-style-type: none"><li>• The flexibility of virtual technology addresses challenge number one by allowing Inheritance of Hope to reach the largest number of families possible. The quality and functionality of the iCohere platform fosters deeper engagement between presenters and event attendees, than a traditional webinar.</li><li>• The audience and presenters were able to attend trainings from home, decrease expenses from attending live events, interact with presenters on a personal level, and learn from Q&amp;A sessions.</li><li>• The economic viability of virtual technology affords the opportunity to broaden the scope and expertise of presenters and raise the quality of the information provided.</li></ul>
Identifying the greatest informational needs of families and the means of distributing the information.	<ul style="list-style-type: none"><li>• By surveying its target audience and past and participating program families, the team developed a list of the greatest informational needs for families.</li><li>• Using the information, the Legacy Lunch webinar series was created, featuring high caliber speakers covering important topics for grieving families. Creating a webinar series addressed challenge number two by providing the information in a scheduled format, but also allowing for recordings of the information that can be retained in a resource center and be disseminated for many years to come.</li></ul>



## PROGRAM MARKETING

Marketing of the training programs played a key role in the success of the program.



**Collaborate with high caliber speakers who have a large circle of influence.** The speakers who present during the series are selected based on their expertise and reputation. The mission of the program is to provide the information families need to as many families as possible, so it is important that the speakers be able to use their influence to help create awareness.

**Implement strategic marketing in advance of the program.** Target marketing is important for program success. The Inheritance of Hope team used a multi-faceted approach including direct mail, a large email list, social platforms and a targeted word-of-mouth grassroots campaign through existing and past participating families. One key focus has been the use of videos. Videos have been created to share about all of the programs available and drive viewers to the website which serves as the central source of information.



**Gather data through online feedback surveys to learn how future events can be improved.** Feedback on the quality of the content and site experience is a valuable opportunity for gauging what users appreciated about the webinar series and also what expectations might not have been met. The team uses feedback provided in the live Q & A sessions and surveys to improve program content.

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*"Inheritance of Hope's webinar series has been a great resource for me! Without it, I would not have exposed to such valuable information for families like mine who are struggling with terminal illness. Thank you!"*

*Legacy Retreat® Participant  
Inheritance of Hope Family Member*

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### PROGRAM EXPANSION

When it comes to virtual webinars, the return on the investment of developing the conference doesn't end when the webinar is over. The webinars become organizational assets that can be blended with other content and repurposed for use in the future or informational purposes, marketing, or as an additional revenue stream.

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*"The legacy lunch series is a great series. Dealing with a life-threatening illness is something that we rarely discuss in our culture. As such many of us are left feeling isolated and alone. Things like the legacy lunches open up those doors and create those avenues of conversation. Thank you!"*

*Kevin Wimbish, M.S., LMFT  
Licensed Marriage & Family Therapist*

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### ABOUT ICOHERE

iCohere, Inc. is a global provider of cloud-based learning management and professional development solutions. The company offers the world's first platform for Unified Learning. Unified Learning is about integrating different modes of learning into a single, consistent user experience. Better for you as an organization; better for them as professional learners.

With offices in Washington, D.C. and Walnut Creek, California, iCohere has been building and refining our platform and support methodologies for over 13 years. iCohere's Unified Learning System is a proven, cloud-hosted platform with facilitation, media production, and support services for professional online collaboration projects and events. Its "all-in-one" integrated system is flexible enough for online conferences, collaborative eLearning courses, large-scale webinars, and online communities of practice.

For 13 years, the iCohere team has been working with private practitioners, associations, non-profits, and government agencies, helping them successfully meet their goals, whether it is generating revenues, amplifying member practices, or expanding their organization's outreach. iCohere offers training and support through every step of the planning, configuration, and execution process, ensuring that clients fully understand and maximize their experience with iCohere's feature-rich platform.

iCohere is a small business provider of solutions to associations, nonprofits, and U.S. government agencies, including the U.S. Dept. of Labor, NIH Clinical Center, U.S. Forest Service and others. iCohere products are available on the GSA IT-70 schedule.

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