

From Fuzzy to Sticky

Motivate Board Members & Prospective Donors



Tom Wilson

Campbell & Company Portland

Amy Fitzgerald

PIH Health Foundation Los Angeles area

Chris Hensley

Northwestern Medicine Central DuPage &
Delnor Hospitals Chicago area

Denise Pruett

University Health System Foundation San Antonio

Sarah Anderson

Campbell & Company Seattle

Campbell & Company

Advancement Planning • Fundraising • Communications • Executive Search

Tom Wilson

VP & Trusted Advisor & Coach

Campbell & Company



30+ years of encouraging donors & nonprofits

- Staff leader & consultant

Oregon, Canada, California, Washington, Montana, Wyoming, Utah, Colorado

- From 12 bed critical access hospitals to academic medical centers
 - Comprehensive campaigns
 - Neurosciences (brain)
 - Heart
 - Cancer



Amy Fitzgerald

Executive Director



Dedicated to serving the community for nearly 100 years

- 2 hospitals, 20 medical offices, 747 beds, more than 5,000 employees and 1,000 volunteers
- Whittier & Downey in the LA area

We raise \$3.6 million to \$6 million a year through major gifts, gala, and golf – 8 FTEs

Foundation ED since 2013, MGO since 2010

Denise Pruett

Executive Director



2005 executive director of University Health System Foundation – on staff since 2003

Primary responsibilities include:

- Implementing, managing, and maintaining the goals of the Board of Directors
- Soliciting and generating donations for ongoing projects
- Educating the community about the mission of University Health System

Chris Hensley



Central DuPage & Delnor Hospitals



Northwestern Medicine is an academic health system with six hospitals –1,768 beds and more than 20,000 employees

- Ranked #1 in Chicago and #11 in the nation

President, Cadence Health Foundation since 2012

- Now serve as Vice President of West Region since merging with Northwestern Medicine

Exceeded five-year Campaign for Cadence Health goal of \$50 million in three years

Northwestern Medicine hospitals raises about \$65 million a year

Sarah Anderson

Director of Strategic Priorities

Campbell & Company



2007 joined Campbell & Company

- Part of our communications team working with clients on messaging

Counsel clients on communications and fundraising strategy, with particular focus on case development

- Hospitals and health systems
- Academic medical centers
- Disease research organizations
- Health policy and access initiatives
- Medical associations

3 Keys for Our Presentation



- 1) Importance of sticky messaging – a **great** case statement
- 2) Sticky case elements of stories, images, and video segments
- 3) Techniques for sharing your case while engaging donors



Fundraising Success Factors

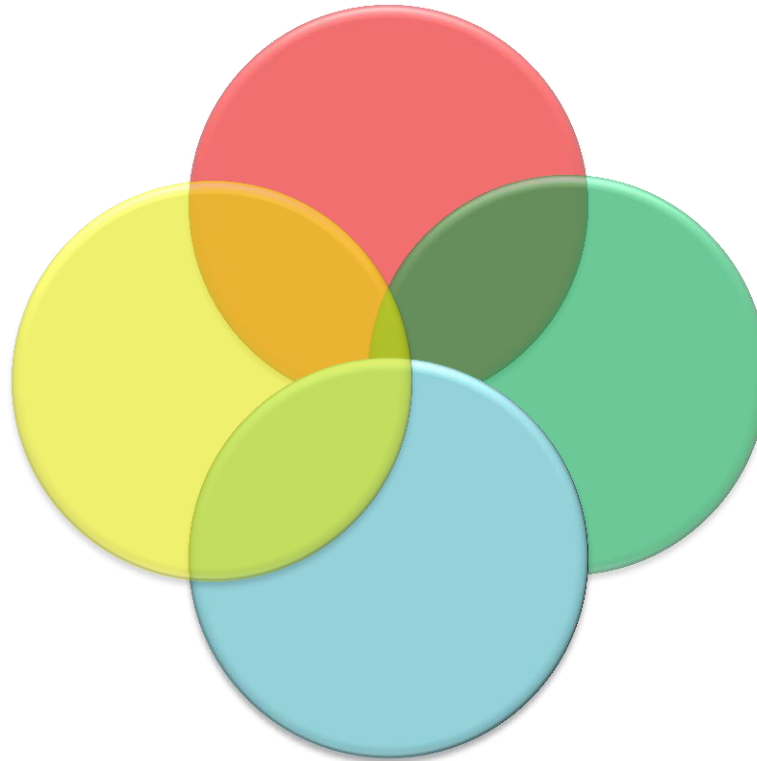


Case Statement

Your sticky message

Leadership
Volunteer, fundraising
staff, organizational

**Donor
Engagement**
Winning Gifts



**Staffing &
Systems**

What Makes a Case Statement Great?



The Art of Selling to the Affluent

Matt Oechsli

“You must make everything clear and easily understood, remembering that affluent prospects have already done their homework.”

“Everything must work exactly as intended.”



The Tipping Point

Malcom Gladwell

1) The law of the few Volunteer Leadership

- Champions — of the organization, projects
- Connectors — know lots of people
- Complete role model donor
- Closers — skills to persuade and ask

2) The stickiness factor Case Statement

- A message with a memorable impact

3) The power of context Focus Groups & Leadership Briefings

- Settings and small factors can make a big difference



Made to Stick

Heath & Heath

SUCCES

Simplicity

Unexpectedness

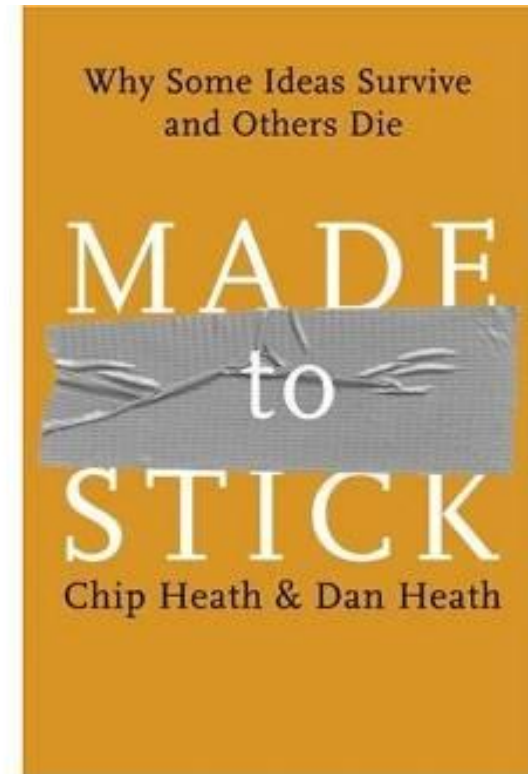
Concreteness

Credibility

Emotions

Staories

The Curse of Knowledge



Our Case Challenge



Amy

We needed to move from a special events oriented Foundation to major gifts focused Foundation to fund meaningful projects for our organization

Administration wants philanthropic revenue

- PIH Health acquired a 2nd hospital in our area
- Administration very focused on integration

A lot of major donor and community excitement around 3-D mammography (tomosynthesis)

- But, what would be next?

Our Solutions



Hired a consultant, Tom Wilson, to do a snapshot fundraising assessment and to advise us over time

Created an annual donor recognition club to engage major gift donors

- To showcase PIH Health's great medical staff
- To raise money for a yearly special project that excites us and our donors



Give every year.
Make a difference every day.



Our Solutions



2015 – a spiritual care initiative to help fund PIH Health's excellent chaplains program

- Tom had success at a previous client with spiritual care
- We had to convince people – stories, video
- Using funds to become a Clinical Pastoral Education (CPE) training site and to eventually fully endow spiritual care services

2016 – looked through multi-year capital budget then interviewed doctors and administrators

- New CT scanner was a compelling story
- 2 physician champions – articulate and energized

2017 – we need to start searching again



Why Is Making a Case Great Such a Challenge?



Generational differences

Men & women

Readers & listeners

4 Listening styles

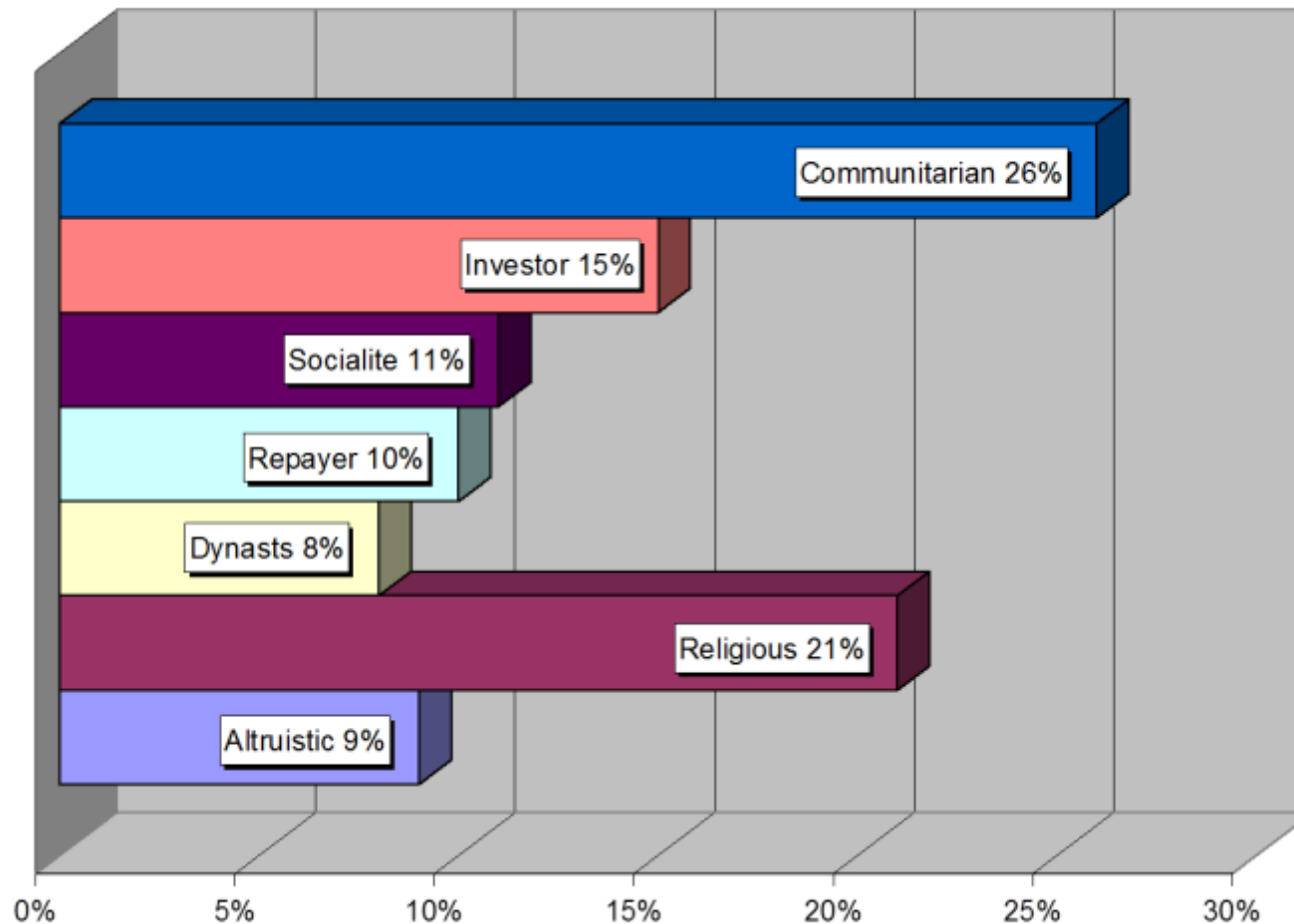
- Action, People, Content, Time

The 7 Faces of Philanthropy

- Differing motivations for giving



The 7 Faces of Philanthropy



Sticky Case Elements of Stories, Images, and Video Segments

You want many ways to capture donors' attention

- Do you have facts for the business men and women
- Photos of patients for the people people?
- Clear, authentic content?
- How patients and the community benefit?
- Stories with impact told by physicians?

Create a VelcroTM case with many, many hooks



Make It Stickier



A picture is worth a thousand words

- Video segments even better

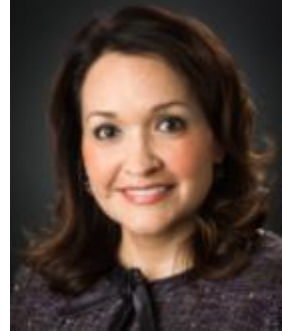
The power of story

- Ask Board members and donors about personal experiences at the hospital
 - What's your favorite hospital story?
 - Reaction to proposed fundraising projects?
 - Feature physician champions

Present uniqueness, urgency, impact



Our Case Challenge



Denise

Our biggest challenge is that we are a publicly funded hospital district

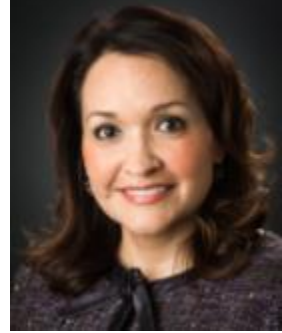
- 24% of our revenues come from taxpayers

We are seen as the hospital for indigent patients

Few donors understand the full scope of our work – the impact on South Texas and with the military

We're not on the radar screen of major donors in our community – we need to change their perception

Our Solutions

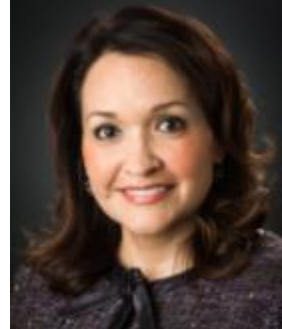


With Sarah's great interview and writing skills, we were able to pull out service line highlights we provide the region with opportunities for philanthropic support

- Sarah helped us to clarify our story and tell it succinctly



Our Solutions



We serve as the trauma hospital for 24 counties and take cases outside of our official trauma region

We are the teaching hospital for UT Health Science Center San Antonio

We provide care for all of south Texas for the most complex medical conditions



- Between tough cases, teaching, and research we have the best doctors in the region
- University Transplant Center has a reach beyond our region and boasts survival rates above national expectations



Our Solutions



We've got feet on the street – Board members

- Telling our story and opening doors

We're finding good resonance

- Fiduciary responsibility of taxpayer dollars making budget year after year
- Pediatric specialties: trauma, burn unit, congenital heart, etc.
- Partner with the military on training and emergency response

Campaign is still a work in progress



Elevator Card

South Texas deserves a destination for leading medicine and a lifeline in times of crisis, and we have it in University Health System. Right here in our community, we have living proof of what's possible when we invest in the region's health.

You may already know that we are expanding our University Hospital and Robert B. Green campuses, but new buildings are only the start. With your support, we can do even more to care for our community in a patient-centered environment.

University Health System Foundation is launching a philanthropic campaign that will build on our strengths in providing lifesaving trauma care and world-class academic medicine in partnership with The UT Health Science Center. Our vision includes support for:

Heart and Vascular Institute | Transplant Patient Fund | Pediatric Care | Trauma Leadership | Trauma Nurse Fellowship

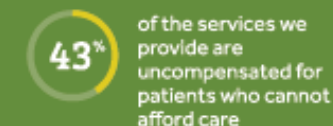
University Health System by the Numbers

EXCEPTIONAL CARE FOR EVERYONE



ANNUALLY, WE CARE FOR MORE THAN:

16,000+
trauma patients across 22 counties



1,000+
burned and injured children in the region's only pediatric trauma center



U.S. News & World Report ranked us San Antonio's #1 hospital for three straight years

1.1 Million
outpatient visits throughout our health system in 2014

Types of Case Statements

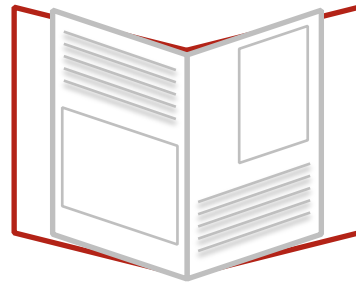


Case statement formats

- The 20- to 30-slide venture capital outline
 - Magazine style with graphics, photos with captions, and as soon as possible video segments
- The two-page executive summary
- Formal folder with flexible inserts



Use the **vehicle** that suits you.



One Pager

3-6 key messages
FAQs
“Cheat sheet”
“Elevator speech”

Case Brief

2-8 pages
Copy, stories, statistics
Ready for design
“Leave-behind”

Presentation

10-20 slides
Simple messages
Clarifying graphics
Conversational

The Elements



Context	Where are we?
Impetus	Why is this urgent?
Vision	What will be different?
Credential	Why us?
Plan	What will we do with your gift?
Appeal	What are we asking you to do?

Our Case Challenge



Chris

When I arrived there was a new CEO who had been on staff for many years as hospital president

- His predecessor didn't prioritize philanthropy

I was hired to change the culture

- Adam Wilhelm and Sarah Anderson of Campbell & Company had already started case meetings with service line managers and docs

We launched a campaign – did well for 3 years

- Then the merger with Northwestern Medicine
 - Relaunch needed – in process

Our Solutions



Success stories

1) Ronald McDonald House even though peds runs through Lurie Children's Hospital docs

- We had champions – both docs and donors
- We have served 225 families in the first year

2) Home care doctor had a vision to teach other health systems how to do it right



- Long-time beloved doc leader and visionary, Dr. Thomas Cornwell
- Raised \$23 million including a lead gift of \$15 million to build a Home Care Institute

Our Solutions



A campaign refresh as part of Northwestern Medicine

- Talking to service line managers and docs to find good projects – immediate needs & aspirations
 - 60 projects down to 15
 - Due diligence then testing the best ideas with the Foundation Board to see what sells
- Internal grant program
 - Use undesignated funds and employee gifts to support a \$500,000 a year grant program
 - Quick response to make a difference
 - A library of ideas for donors to consider

Techniques for Sharing your Case while Engaging Donors



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- 30 minute case presentation, feedback forms, partner discussions, report back – co-discovery process



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Campaign Planning Study (feasibility study)

- 1-on-1 interviews



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Campaign Planning Study (feasibility study)

- 1-on-1 interviews

Any time

- Readiness interviews





Tips for a Great Case



- 1) Explore – review your organization’s strategic plan
 - Interview all senior administrators, medical director, service line managers, key docs
 - Who is getting you excited about projects that benefit patients and the community?
- 2) Look at each year’s operating budget for special equipment that makes an impact on patient care
 - Review multi-year major capital acquisition budget for significant projects in the next 3-5 years



Tips for a Great Case



3) The most compelling case statement – a physician champion **plus** a volunteer fundraising champion

- Get to know the stars on your medical staff so you can look for champions to motivate your donors
- Interview all Foundation Board members and top cumulative donors to find out why they love your hospital – why they invest
 - Which projects are they passionate about?
- Then, confirm case statement with administration for alignment and staff champions



Tips for a Great Case



4) What if you still can't find a great case?

- a) Raising money for nurses is a win win
 - On boarding, specialization certification, advanced degrees
- b) If you have a good chaplains program, expanding and/or endowing spiritual care works
- c) Emphasize philanthropy's role in accelerating healthcare investments
 - The hospital will do it eventually, but donors can make it happen fast



Tips for a Great Case



5) Keep your case statement flexible

- A primary focus is fine
 - But always provide a couple of options
 - Endowed physician chairs are not only for academic medical centers
 - Something around cancer, heart, brain, ER will interest a lot of donors
 - Innovation Rapid Response Fund for new equipment and clinical discovery
 - Fund for the Future for planned estate gifts



Tips for a Great Case



6) In-house rehearsals help you find additional information

- Sharing your case helps the staff understand the project and how fundraising works
- Staff forums, doc practice meetings or physician personal meetings (7 minutes)





Tips for a Great Case



7) Audition externally to get feedback on your case from prospective donors, don't guess – ask them

- Invite both Boards and their spouses in a participative focus group format
- Ask Board members to host leadership briefings
- Engage all donors with a survey – mail & email
- 1-on-1 interviews
- Reflect on the energy and passion you detect





Tips for a Great Case



8) Keep refining your case statement

- Kaizen – continuous improvement
 - A great case is always a work in progress
 - Remember your website and 990

9) Take the time to make your case great

- If you're not sold, why would you donors be?

10) Don't settle for a "good" case, get a **great** case

- Jim Collins – Good To Great
 - "Good is the enemy of great."

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Motivate Board Members & Prospective Donors



Tom Wilson

Tom.Wilson@CampbellCompany.com

Amy Fitzgerald

Amy.Fitzgerald@PIHHealth.org

Chris Hensley

Chris.Hensley@CadenceHealth.org

Denise Pruett

Denise.Pruett@uhs-sa.com

Sarah Anderson

Sarah.Anderson@CampbellCompany.com

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Advancement Planning • Fundraising • Communications • Executive Search

Resources



Spiritual care video to launch multi-year project funding at PIH Health

<https://www.youtube.com/watch?v=nxcZgfl8Stw>

University Health System – 4 patient stories

http://www.theuniversitydifference.com/?utm_source=corpcomm&utm_medium=web&utm_campaign=advertising_campaign_2015&utm_content=ud_uhs_landing_callout

Northwestern Medicine Central DuPage & Delnor Hospitals

<https://www.cadencehealth.org/about-cadence-health/foundation/donor-stories>