



Campaigns: Higher Education versus Healthcare



Unbound

Thursday: June 4, 2020



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Philanthropic Consulting, LLC

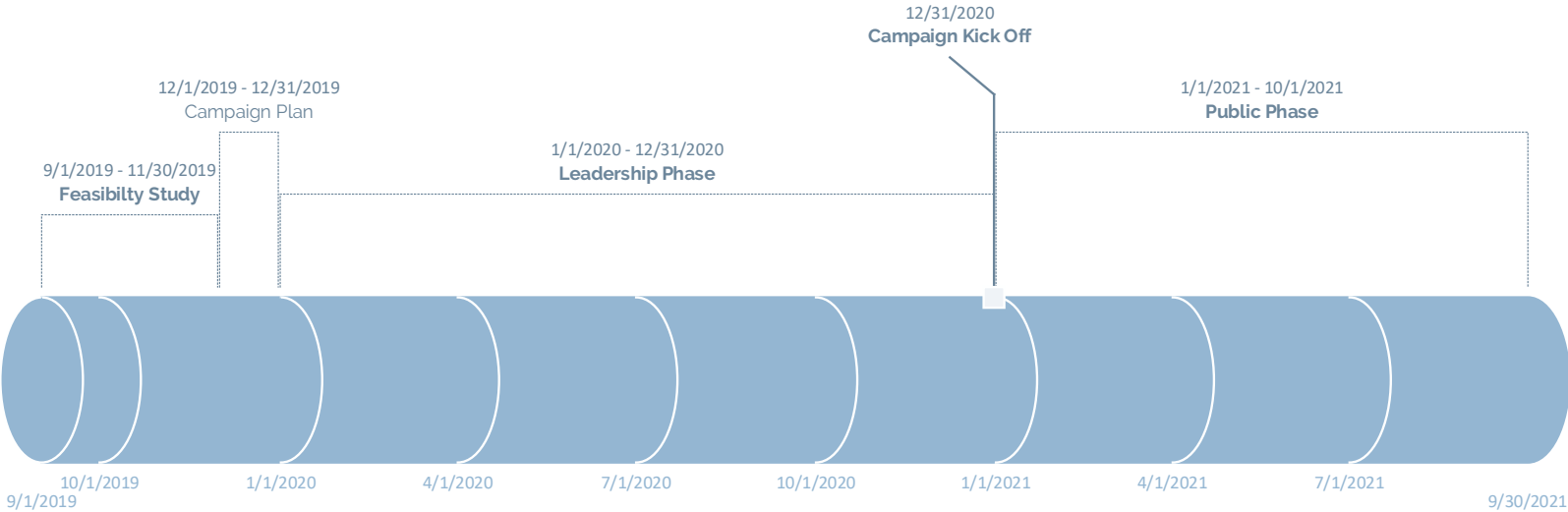
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Campaigns

Campaign Phases

1. **Planning and Preparation**
2. **Leadership Gift Phase**
3. **Campaign Kick Off**
4. **Public Phase**
5. **Celebration and Stewardship**

Sample Timeline



Phase 1: Planning & Preparation

- ✓ Case Statement
- ✓ Feasibility Study
- ✓ Gift Chart
- ✓ Campaign Plan
 - ✓ Budget
 - ✓ Timeline
- ✓ Campaign Committee
- ✓ Policies
- ✓ Education and Cultivation

Campaign Plan

- Task Summary TimeLine
- Straight Line Projection & KPI Dashboard
- Campaign Engagement-Cultivation Activity / Events
- Campaign Budget
- Campaign Leadership and Organization
- Leadership Gift Engagement Schedule
- Quite Phase Prospect Solicitation Schedule
- Staff / Volunteer Resource Alignment
- Campaign Counsel

Campaign Gift Chart

Gift Level	Donors Needed	Prospects Needed	Projected Gifts	Cumulative Gifts	Percentage of Total	Cumulative Percentage
\$5,000,000	1	4	\$5,000,000	\$5,000,000	25.0%	25.0%
\$2,500,000	2	8	\$5,000,000	\$10,000,000	15.0%	50.0%
\$1,000,000	2	8	\$2,000,000	\$12,000,000	10.0%	60.0%
\$500,000	4	20	\$2,000,000	\$14,000,000	10.0%	70.0%
\$250,000	8	40	\$2,000,000	\$16,000,000	10.0%	80.0%
\$100,000	20	100	\$2,000,000	\$18,000,000	10.0%	90.0%
\$50,000	20	100	\$1,000,000	\$19,000,000	5.0%	95.0%
\$25,000	40	200	\$1,000,000	\$20,000,000	5.0%	100.0%
Less Than \$25,000	MANY	MANY	\$250,000	\$20,250,000	1.0%	101.0%

- 5 donors contributing 60% of the total

Phase 2: Quiet Phase- Secure 55-60%

- Secure Leadership Gifts
- Secure and confirm Campaign Chair (co-chairs)
- Secure and confirm Campaign Committee
- Initiate Campaign Information/Cultivation Events
- Plan & Rehearse Solicitation presentations
- Present Gift Opportunities
- Engage and Solicit leadership gift prospects

Prospect Road Map

Gift Level	Donors Needed	Prospects Needed	# Qualified	Delta	Projected Gifts	Cumulative Gifts	% of Total	Cumulative %
\$5,000,000	1	4	7	3	\$5,000,000	\$5,000,000	25.0%	25.0%
\$2,500,000	2	8	3	(5)	\$5,000,000	\$10,000,000	15.0%	50.0%
\$1,000,000	2	8	14	6	\$2,000,000	\$12,000,000	10.0%	60.0%
\$500,000	4	20	58	38	\$2,000,000	\$14,000,000	10.0%	70.0%
\$250,000	8	40	53	13	\$2,000,000	\$16,000,000	10.0%	80.0%
\$100,000	20	100	476	376	\$2,000,000	\$18,000,000	10.0%	90.0%
\$50,000	20	100	76	(24)	\$1,000,000	\$19,000,000	5.0%	95.0%
\$25,000	40	200	176	(24)	\$1,000,000	\$20,000,000	5.0%	100.0%
< \$25,000	MANY	MANY	842	42	\$250,000	\$20,250,000	1.0%	101.0%
Total			1,698	422		\$20,250,000		101.0%

Need to work the upper end of the chart and create unique, engagement and solicitation plans for each identified and rated prospective donor.

Phase 2: Campaign Kick-off

- Reach 55-60% Campaign Threshold
- Educate & Train volunteer solicitors
- Assign prospective donors to volunteers
- Invite prospects to Kick-off Event
- Reinforce the mission & vision
- Recognize Leadership Gifts
- Inform attendees they will receive an invitation to a meeting with a campaign volunteer or staff member within the next two weeks....

Phase 3: Public Phase - Remaining 40%

- Community Relations Program
- Convene tours of the construction site
- Schedule meetings with prospective donors
- Develop donor-specific proposals
- Solicit donors
- Broad-base Community “Paver” initiative
- Acknowledge and steward gifts
- Exceed the Campaign Goal

Phase 4: Celebration and Stewardship

- Celebration event inside the new building
- Honor Lead donors
- Honor Every donor
- Unveil signage, donor recognition
- Guided Tours
- Thank for generosity
- Identify opportunities to introduce planned giving

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Constituencies

Constituencies

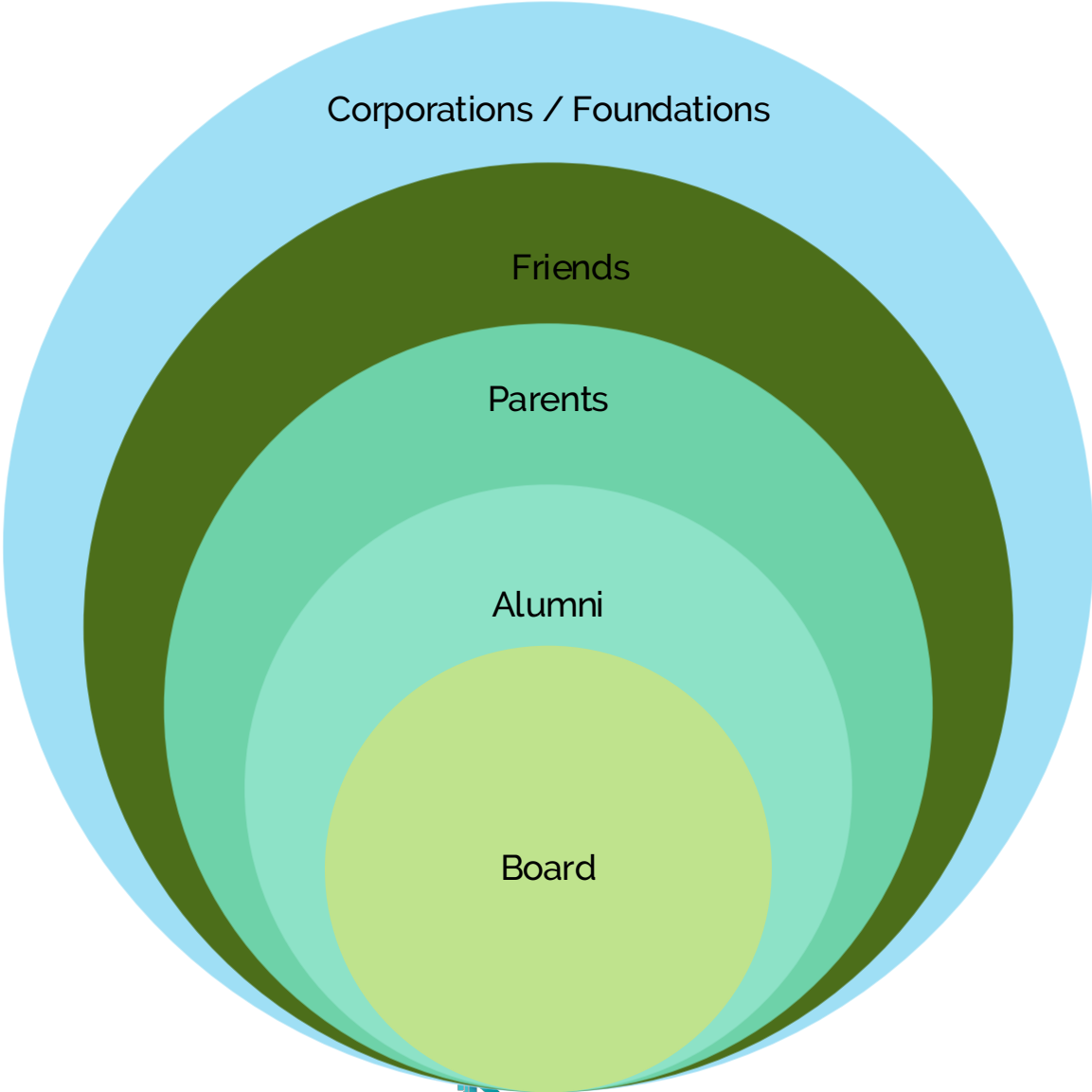
Higher Education

- Board
- Faculty/Staff
- Alumni
- Parents
- Friends
- Corporations & Foundation

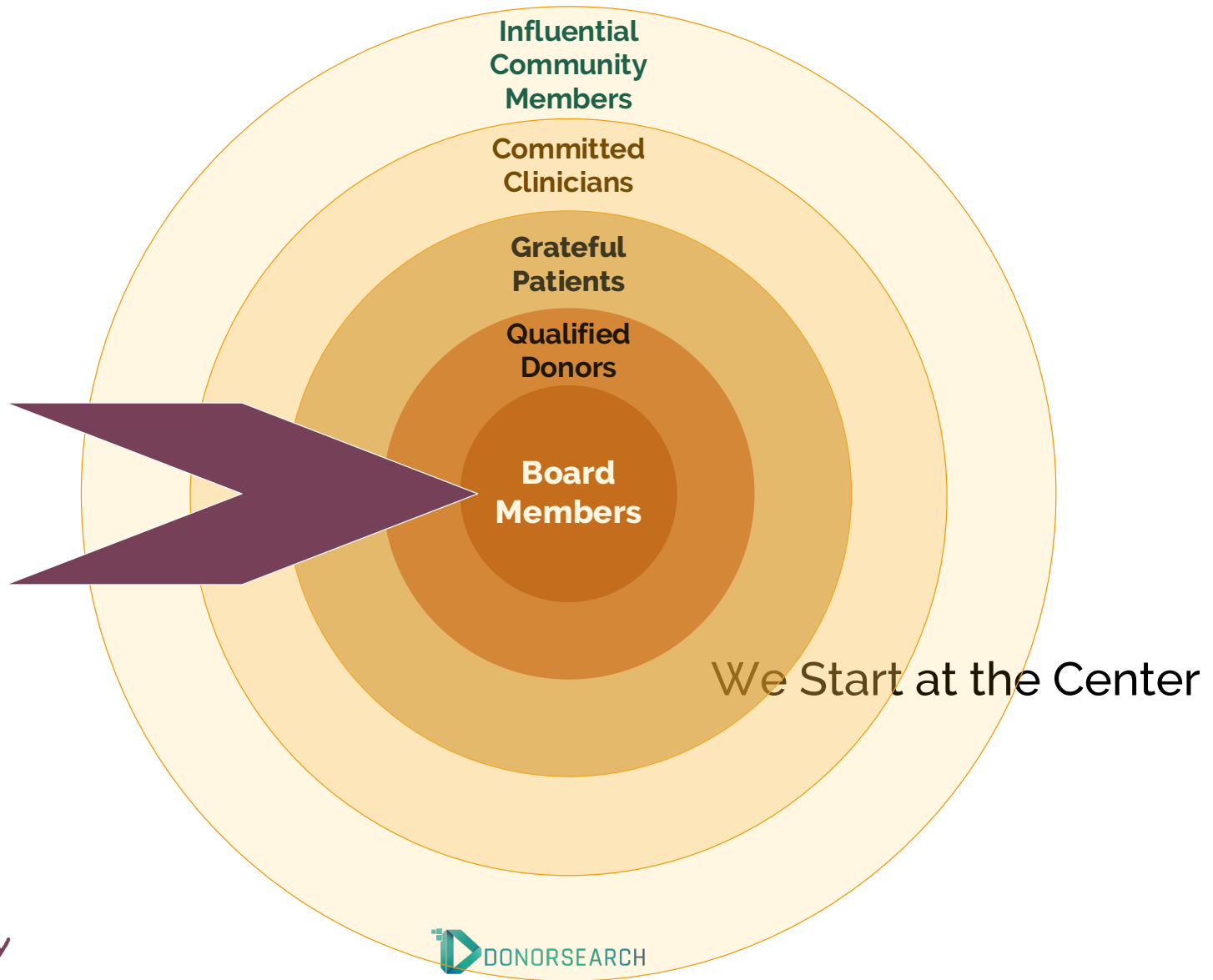
Healthcare

- Board
- Clinicians
- Grateful Patients & Guarantors
- Vendors
- Population within Census Area

Higher Ed Market



The Healthcare Philanthropy Market



Charity Hospitals

- Board
- Clinicians
- Community Leaders
- Vendors
- Community Foundations

Identify the Audience

Education

- Board Members
- Advisory Board Members
- Major Donors
- Qualified Gift Prospects
- Recent Donors, (last five years)
- Alumni
- Parents
- Friends

Healthcare

- System/Hospital Board Members
- Advisory / Foundation Board
- Major Donors
- Qualified Gift Prospects
- Recent Donors, (last five years)
- Patients
- Guarantors
- Vendors & Supporters

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What donors want

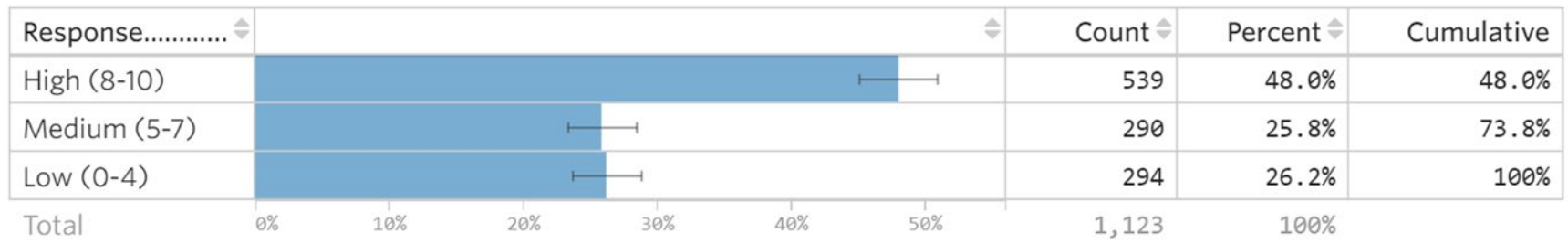
Vision

- Higher Education:
 - Changing Lives
 - Preparing for the future
 - Education and Research
- Health Care
 - Saving Lives
 - Ending Human Suffering and Disease
 - Improving the quality of live



Impact of Gift Motivates Donors

Q. Knowing the Impact of your Gift in Deciding Whether to Give:

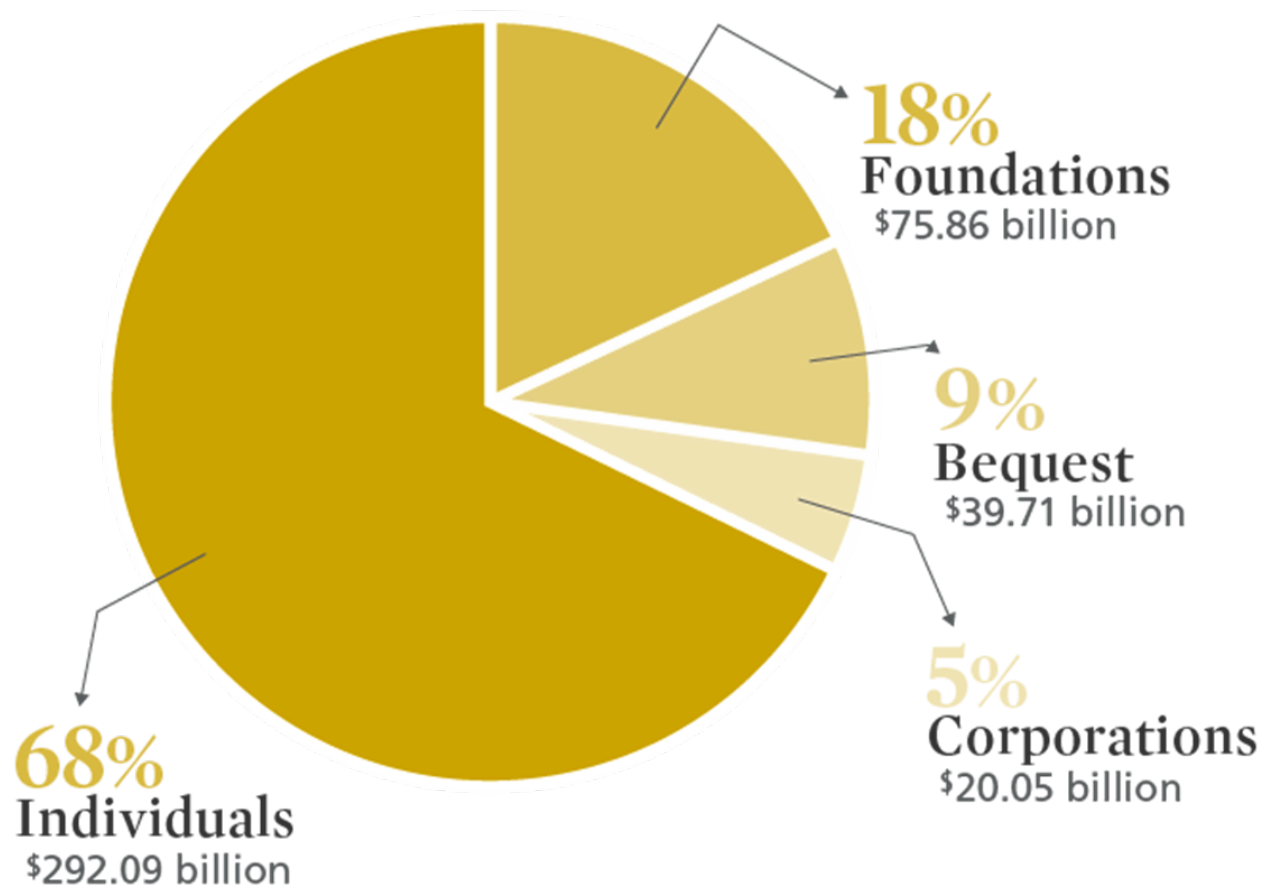


Response.....	\$100k+	\$25k to \$99.9k	\$1k to \$24.9k	Less than \$1k
High (8-10)	87.5%	53.8%	44.2%	48.4%
Medium (5-7)	6.3%	30.8%	27.1%	25.5%
Low (0-4)	6.3%	15.4%	28.7%	26.1%
Total	100.0%	100.0%	100.0%	100.0%

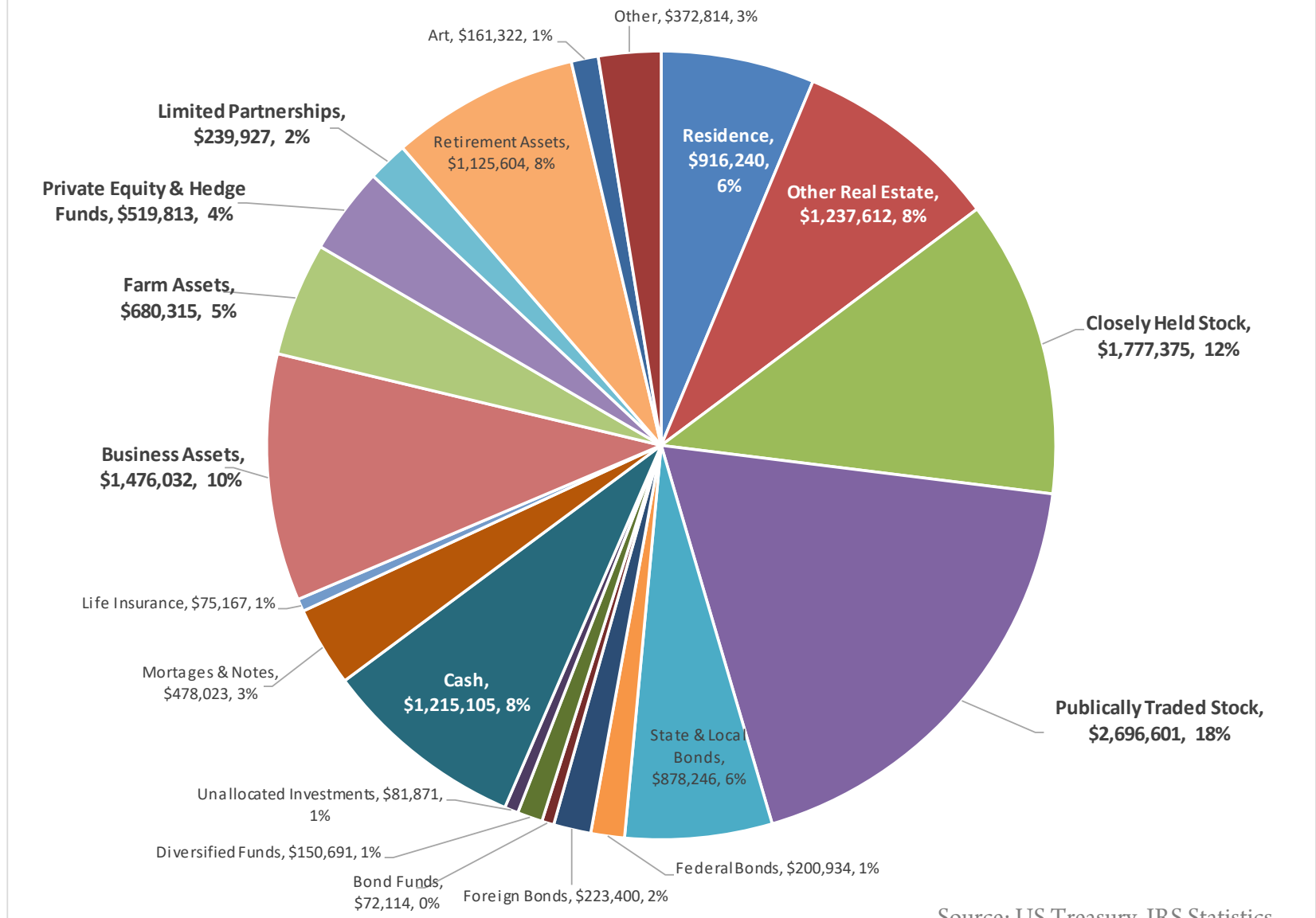
88% of the major gift donors make a philanthropic investment based on the IMPACT of their donation



Source of Giving



Ultra Wealthy may continue to Step UP



Source: US Treasury, IRS Statistics

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Case Development

Mission Vision and Impact





Presenting the Case for Support



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Nature of Prospect Engagement

Higher Education

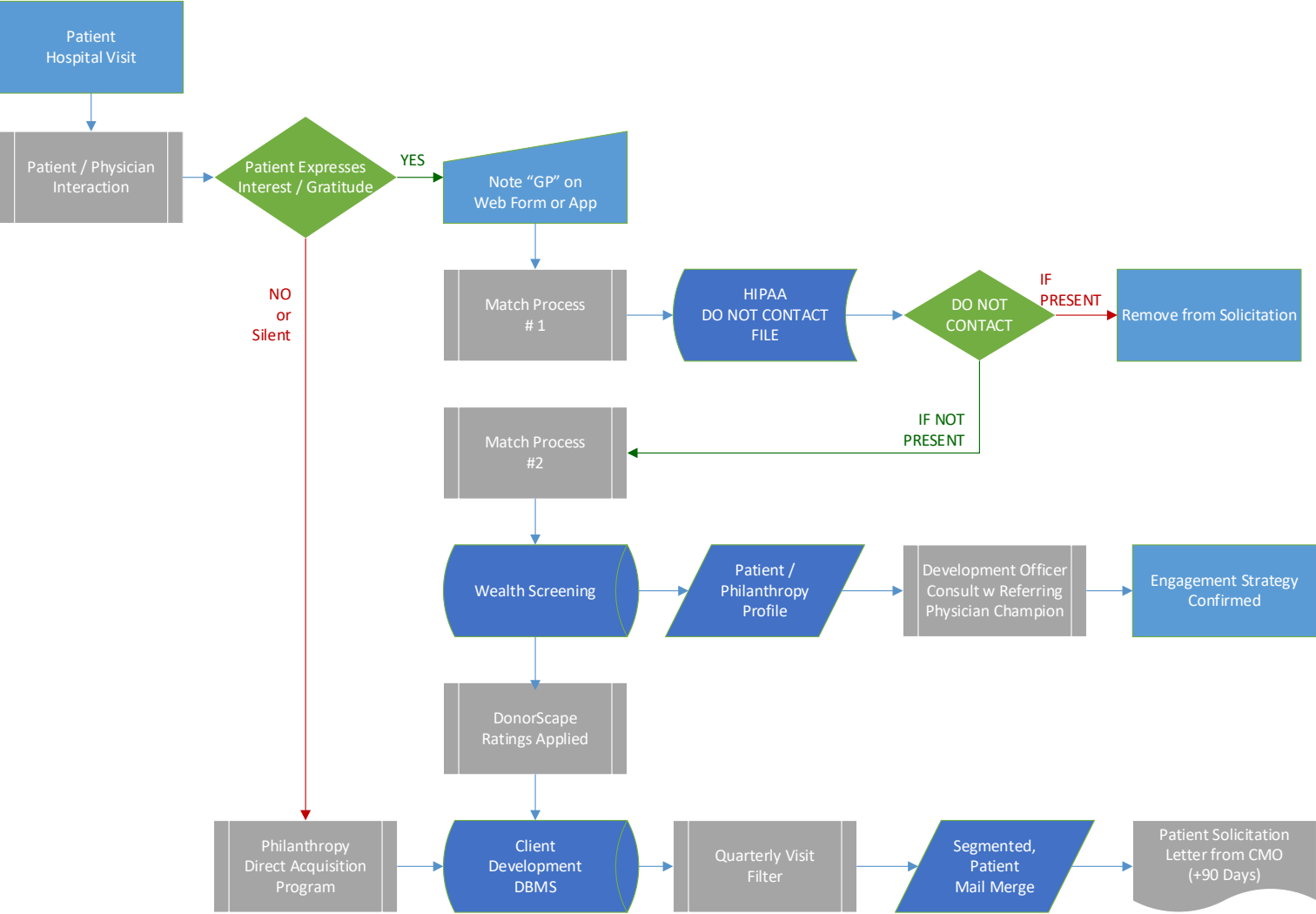
- 4 year undergraduate experience
 - Academic
 - Inter Collegiate Athletics
 - Social Clubs
 - Student government
- 2-6 year graduate / post graduate experience

- Alumni Relations programming
- Advisory Council engagement
- Regional activity

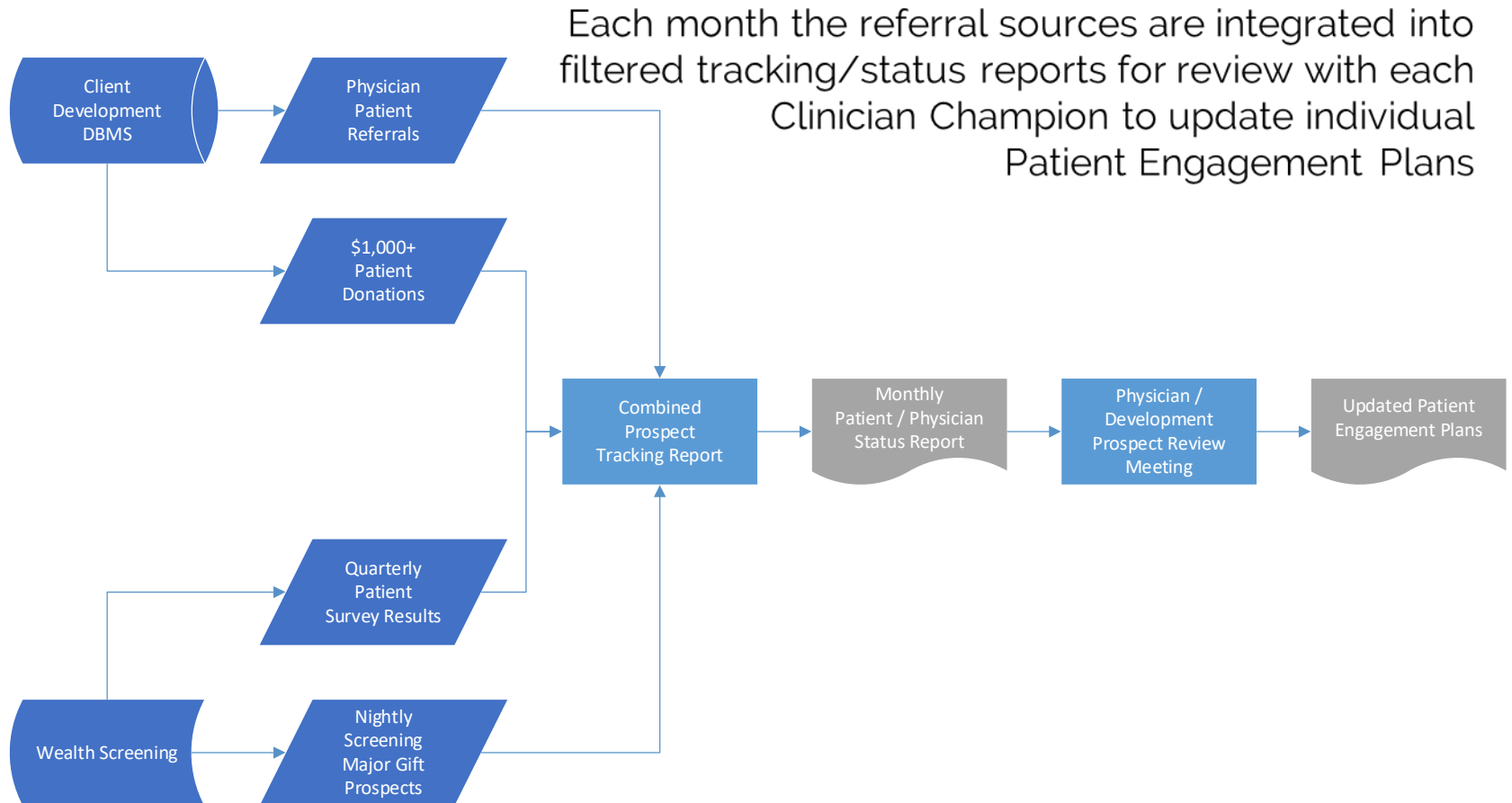
Healthcare

- Episodic Experience
- Positive or negative
- Golden window 90 days

Grateful Patient Encounter



Monthly Case Review with Clinician



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Metrics

Solicitation Metrics

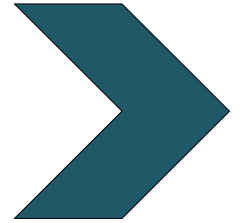
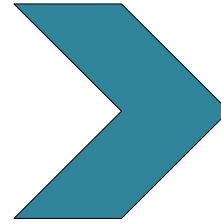
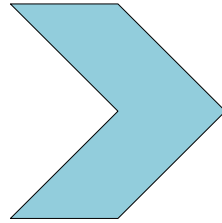
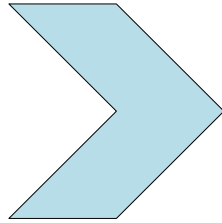
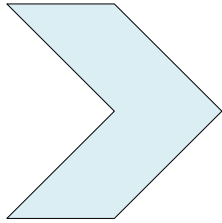
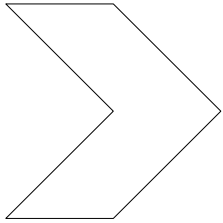
Education

- 18-24 months
- 7-8 personal meetings
- Often Direct to Prospect

Healthcare

- 6-9 months
- 4-5 meetings
- Introduction by Clinician

The New Model- E-visits



Phone Call to
Introduce
New Major
Gift Officer

Request for
Meeting
Denied

Trustee
Discussions
Regarding
Naming
Opportunity

Phone Calls,
Many, **Many**
Phone Calls

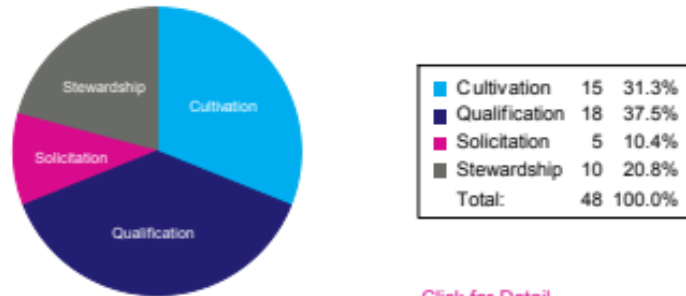
Multiple
Email Chains
Regarding
Gift
Agreement

In-Person
Signing of
Gift
Agreement



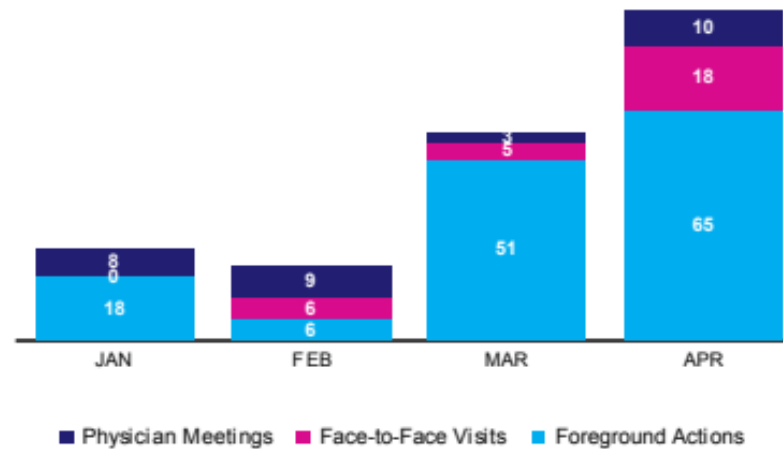
New Model Activity Report

Major Gifts Prospects by Status



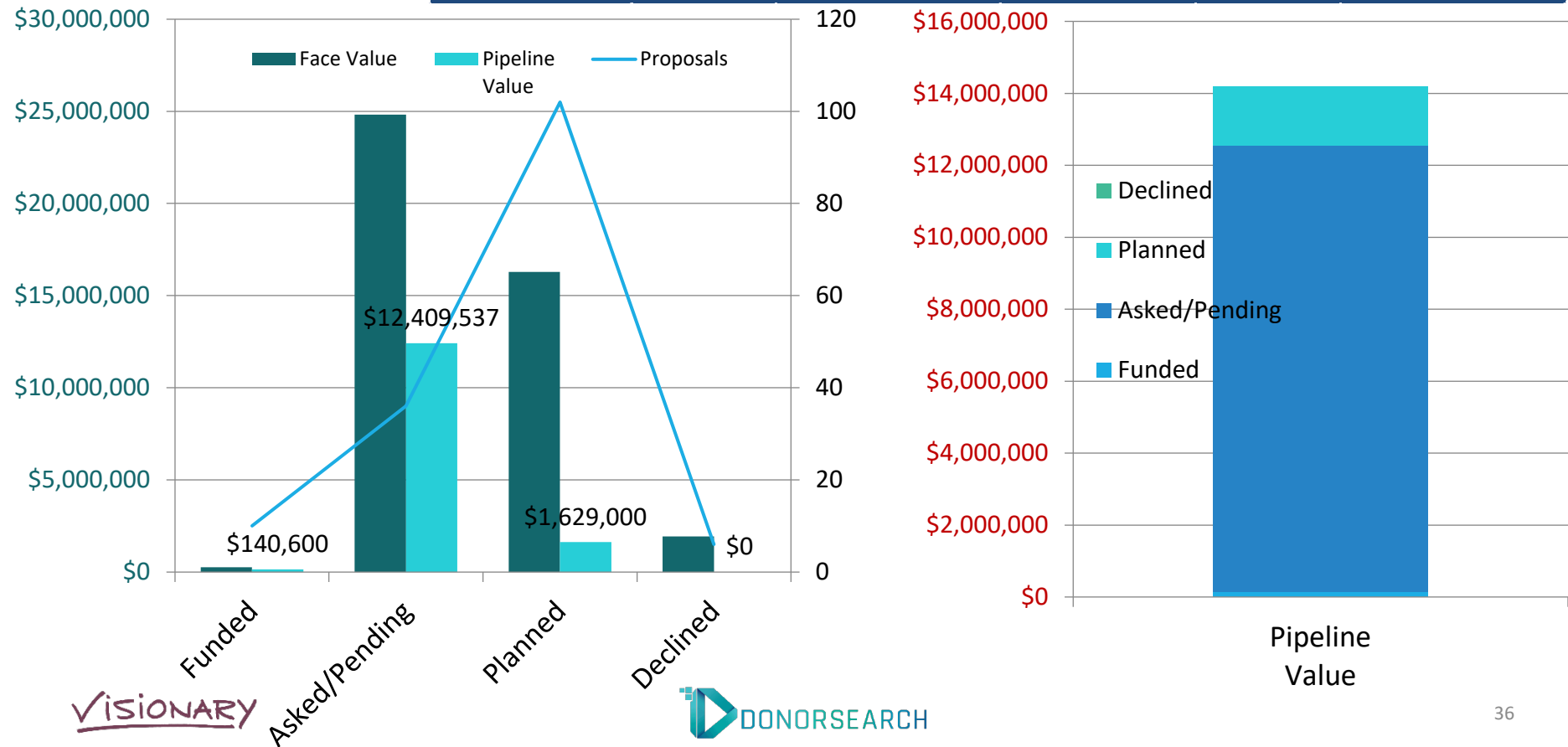
[Click for Detail](#)

Face-to-face visit & foreground activity summary



Value of Pipeline

	Proposals	Face Value	Funded	Discount Value	Pipeline Value
Funded	10	\$257,000	\$148,000	95%	\$140,600
Asked/Pending	36	\$24,819,074		50%	\$12,409,537
Planned	102	\$16,290,000		10%	\$1,629,000
Declined	6	\$1,929,448		0%	\$0
Total:	154	\$43,295,522	\$148,000		\$14,179,137



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Evidence of Success



Johns Hopkins University Campaign

\$6.015B Raised



DONORS	GIFTS	GIFTS OF \$1M+
279,293	878,843	885



159 undergraduate scholarships established

\$3.87B

raised for research and program support

\$231.4M

total committed for undergraduate financial aid



267 professorships established, including 50 Bloomberg Distinguished Professors, with 40 named to date

\$380M

total committed for graduate student and other financial aid

\$368.3M

raised for buildings and facilities



FJHM Campaign Highlights: 2010-2018



Steve Rum

\$2.8 Billion Raised

v. Goal of \$2.65B



189,417
Donors



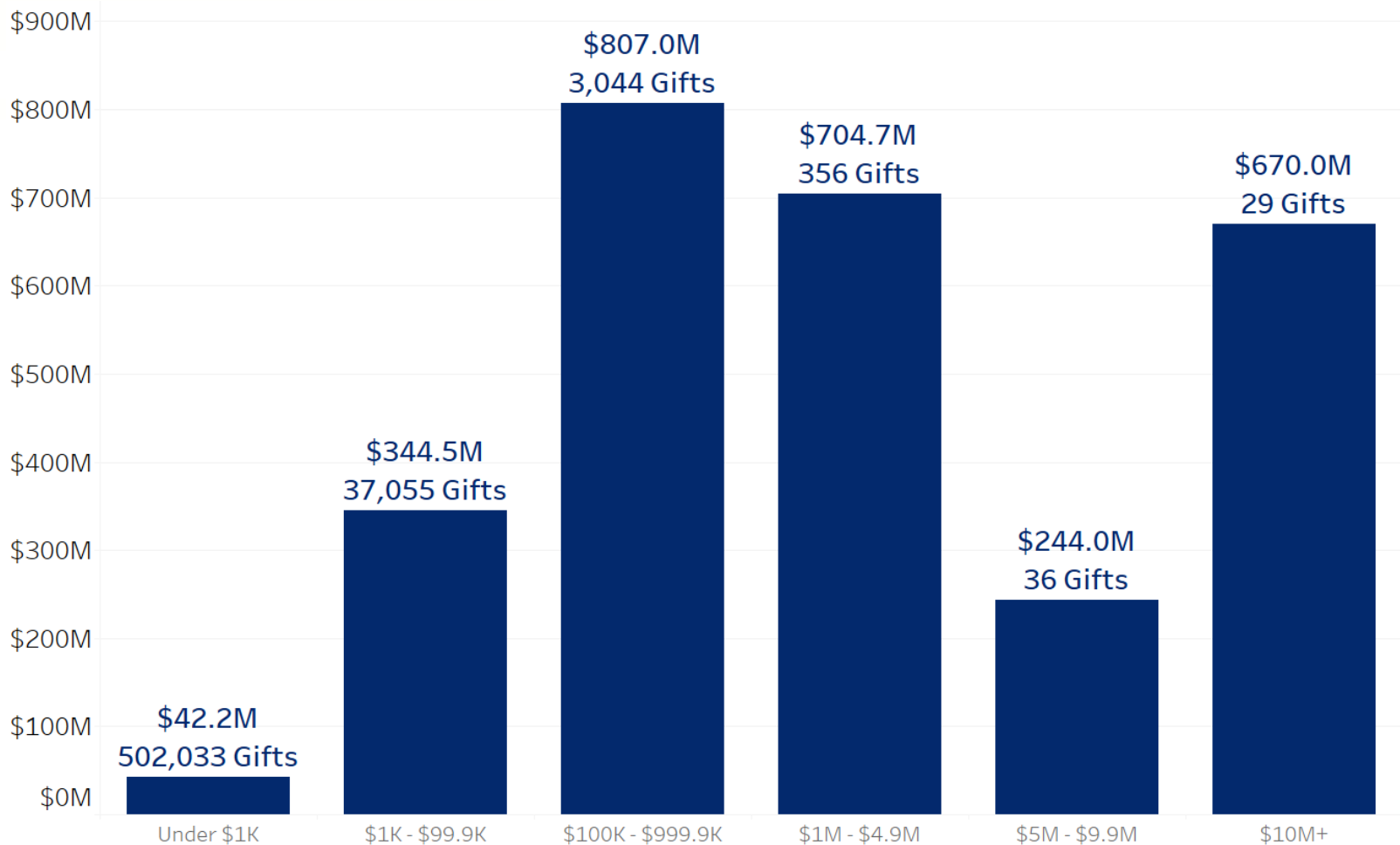
83
Professorships



542,500
Gifts



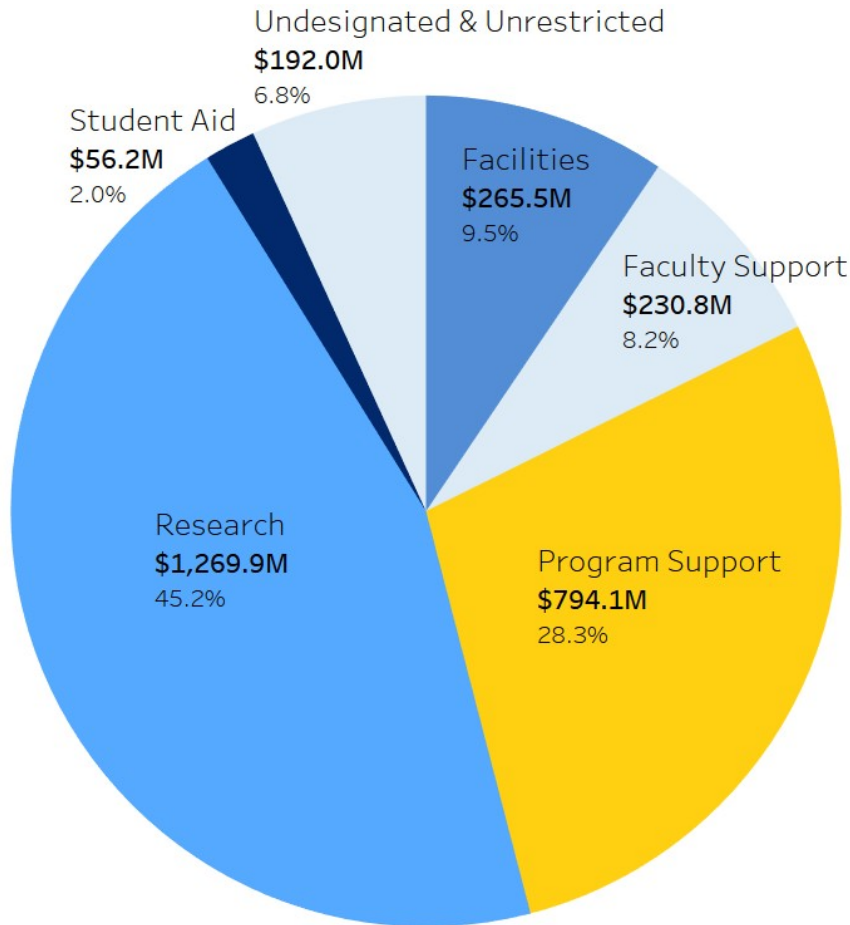
FJHM Campaign Results: Gifts and Pledges by Commitment Size



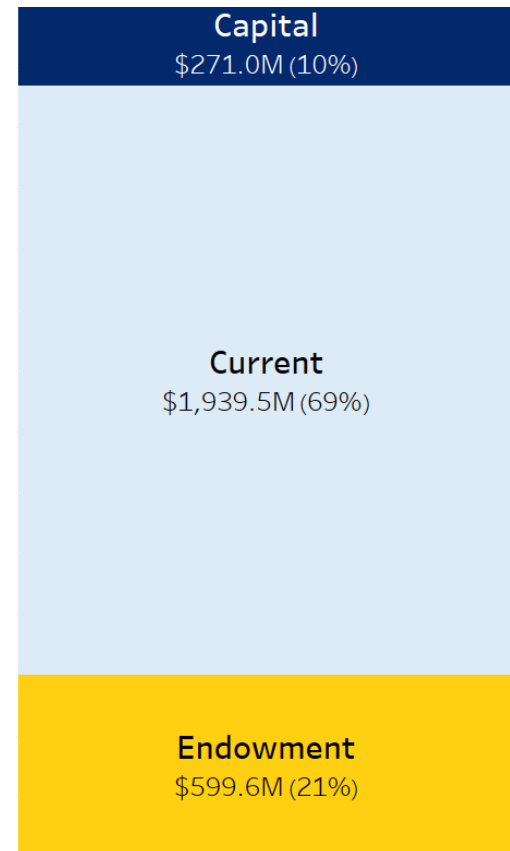


FJHM Campaign Results: Gifts & Pledges by Purpose and Use

Purpose



Use



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Thank you!



For more information contact
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Visit the web site: www.visionaryphilanthropy.com/resources