

A wide, shallow waterfall cascading over a dark rock ledge into a pool of water below. The water is white and frothy as it falls. The background is a dense forest of green trees.

# Campaigns: Higher Education versus Healthcare



Unbound  
Thursday: June 4, 2020



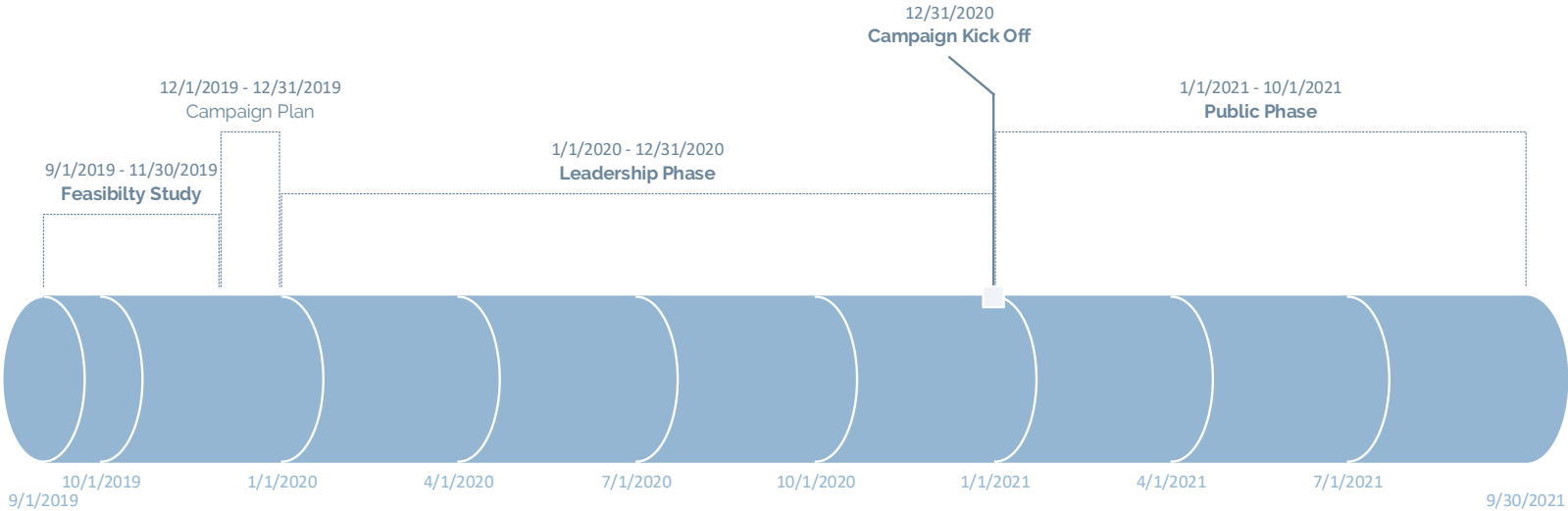
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Campaigns

# 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	<b>1</b>	4	7	3	\$5,000,000	\$5,000,000	25.0%	25.0%
\$2,500,000	<b>2</b>	8	3	(5)	\$5,000,000	\$10,000,000	15.0%	50.0%
\$1,000,000	<b>2</b>	8	14	6	\$2,000,000	\$12,000,000	10.0%	60.0%
\$500,000	<b>4</b>	20	58	38	\$2,000,000	\$14,000,000	10.0%	70.0%
\$250,000	<b>8</b>	40	53	13	\$2,000,000	\$16,000,000	10.0%	80.0%
\$100,000	<b>20</b>	100	476	376	\$2,000,000	\$18,000,000	10.0%	90.0%
\$50,000	<b>20</b>	100	76	(24)	\$1,000,000	\$19,000,000	5.0%	95.0%
\$25,000	<b>40</b>	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%
<b>Total</b>			<b>1,698</b>	<b>422</b>		<b>\$20,250,000</b>		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

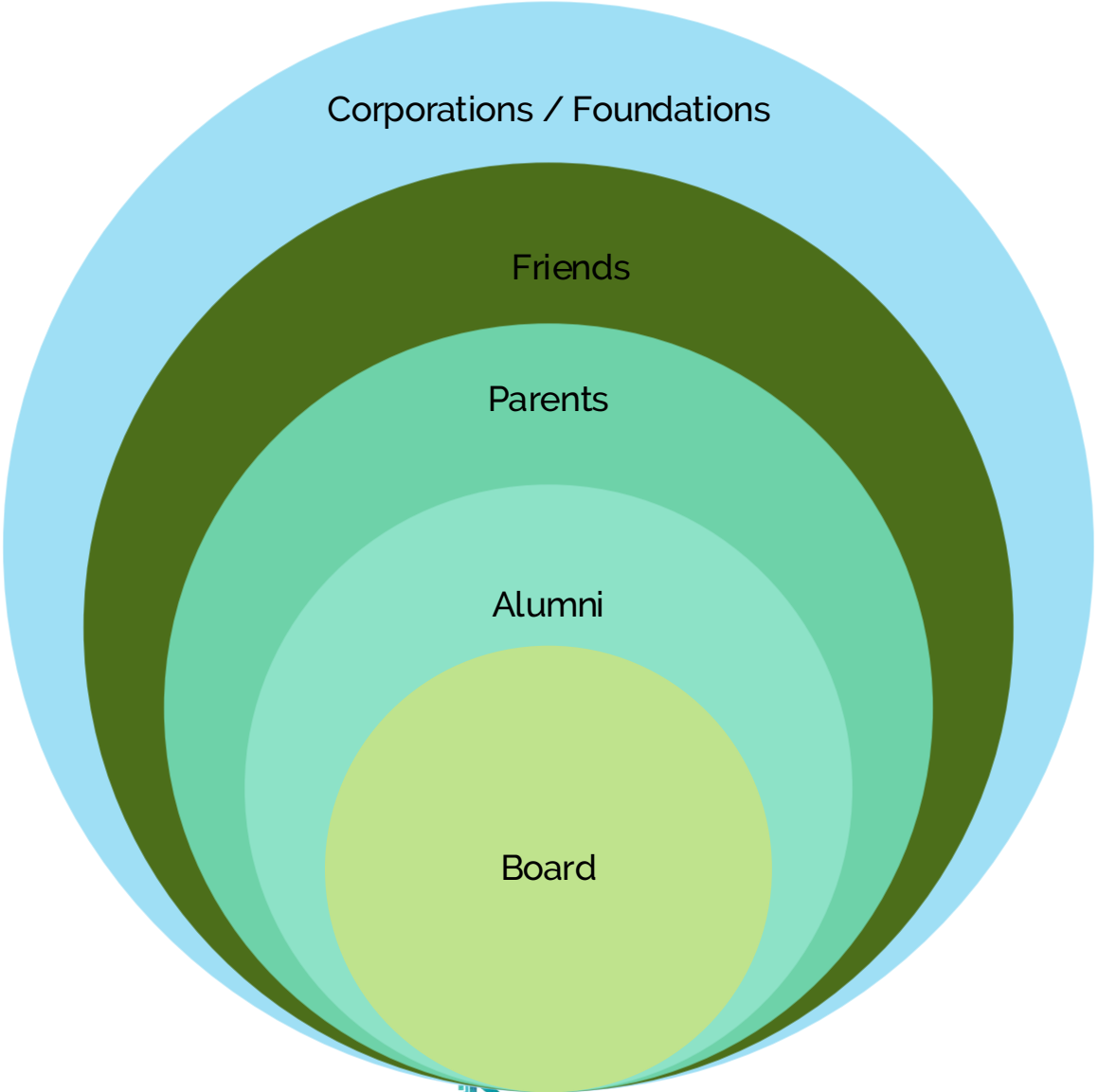
## Higher Education

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

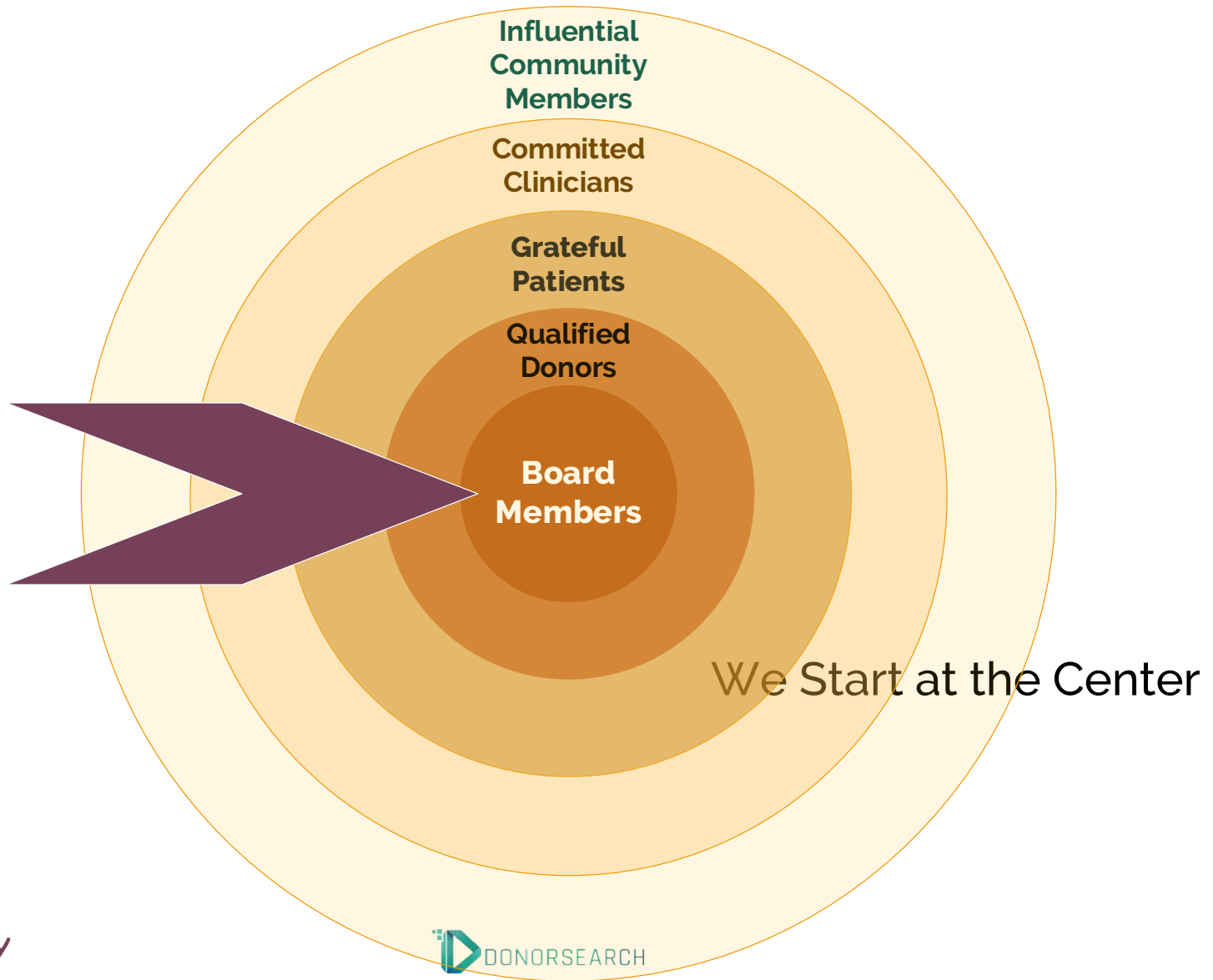
## Healthcare

- 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

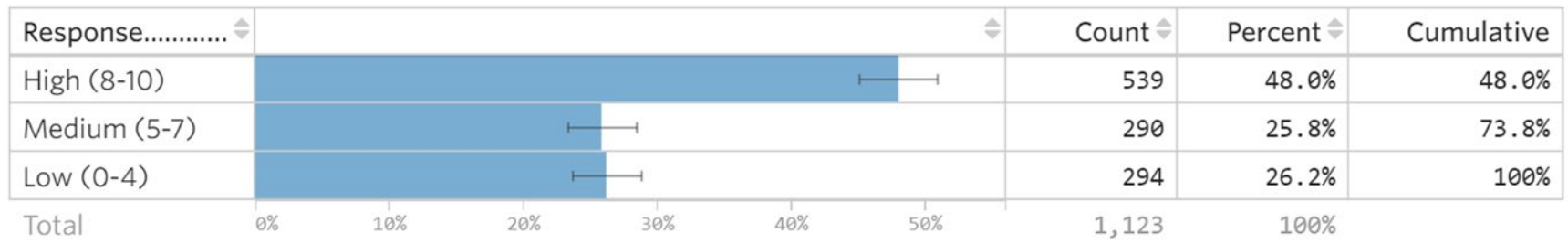
# Vision

- 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:

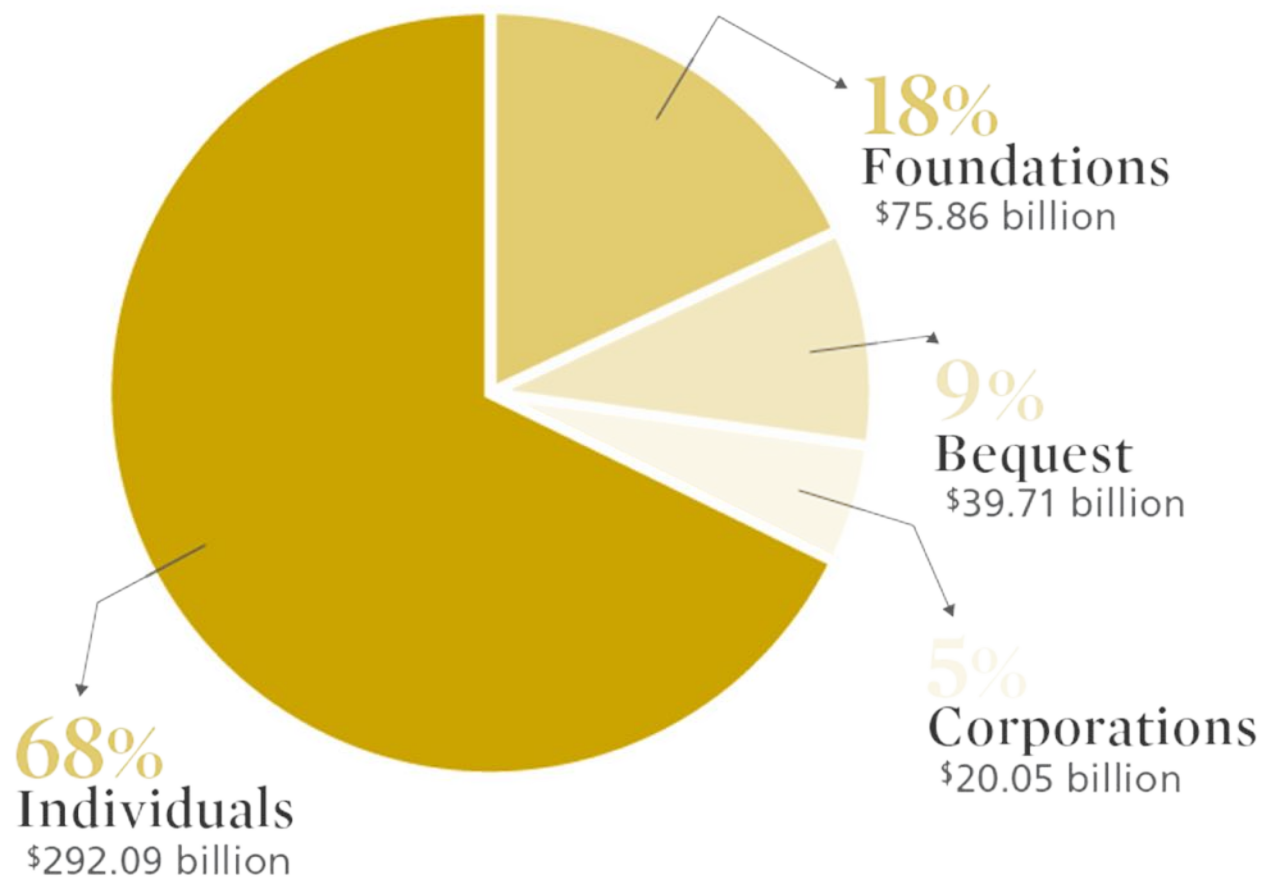


Response.....	\$100k+	\$25k to \$99.9k	\$1k to \$24.9k	Less than \$1k
High (8-10)	87.5%	53.8%	44.2%	48.4%
Medium (5-7)	6.3%	30.8%	27.1%	25.5%
Low (0-4)	6.3%	15.4%	28.7%	26.1%
Total	100.0%	100.0%	100.0%	100.0%

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

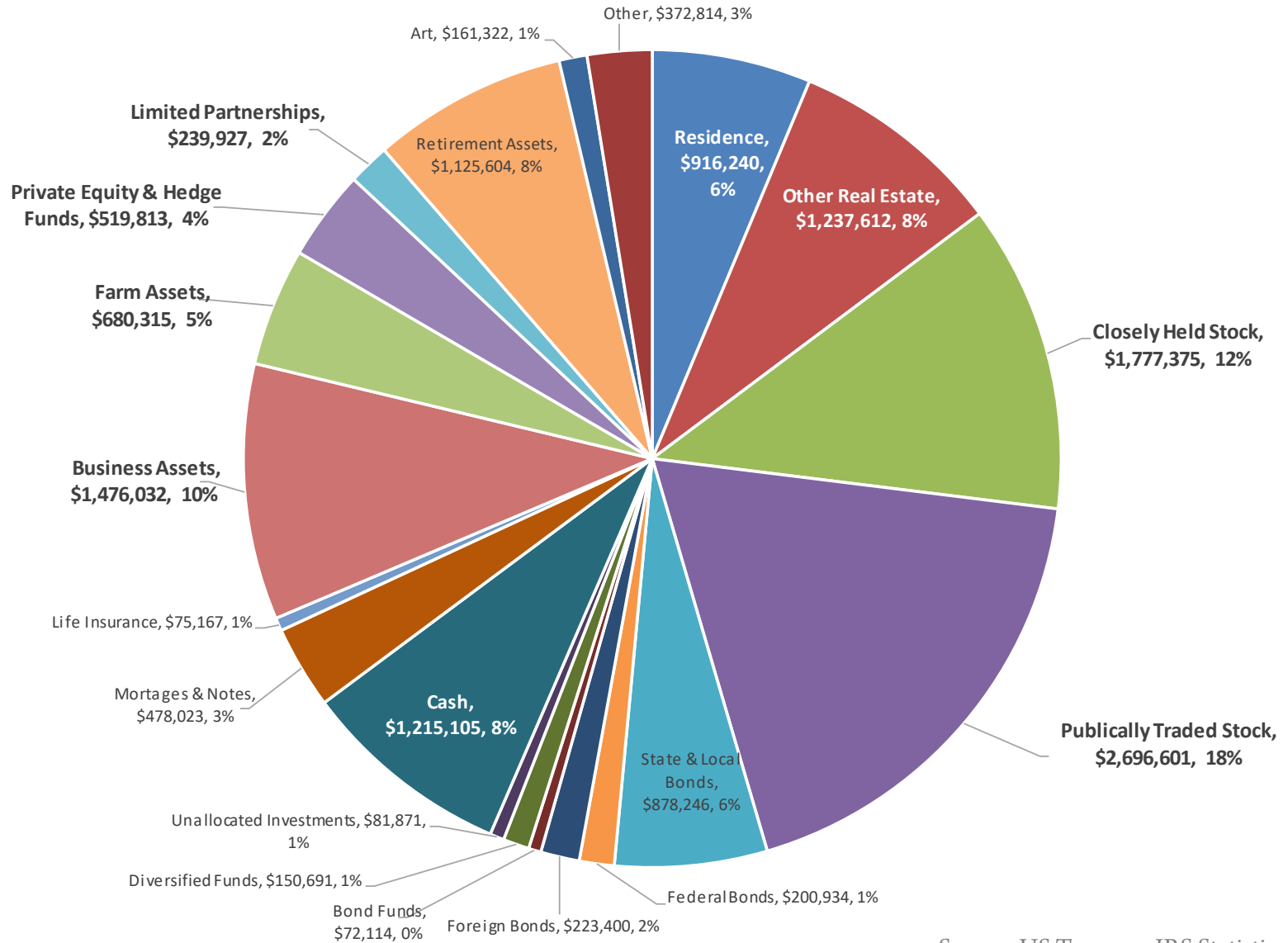


# Source of Giving





# 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

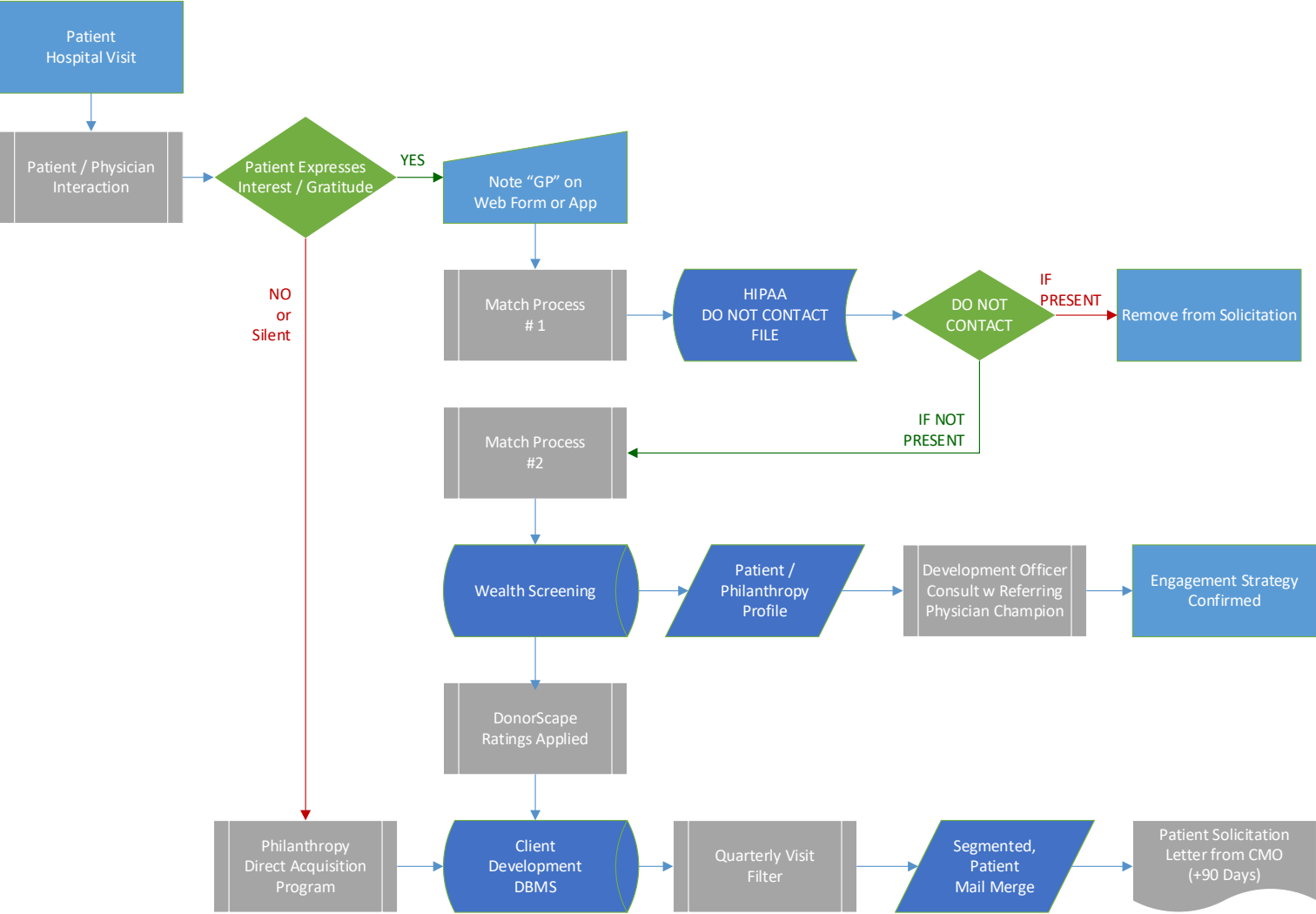
# Higher Education

- 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

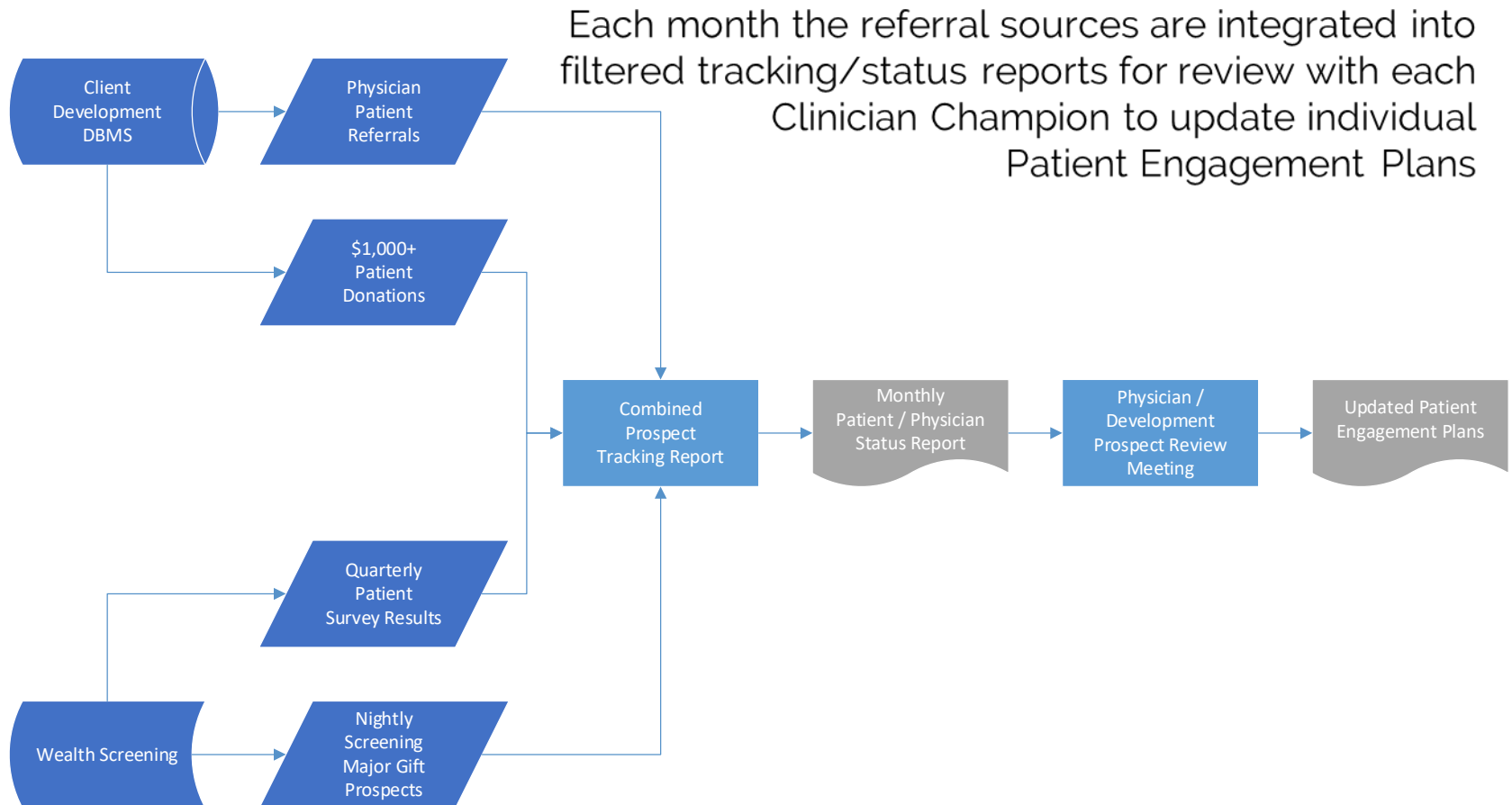
# Healthcare

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

# Grateful Patient Encounter



# Monthly Case Review with Clinician



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Metrics



# Solicitation Metrics

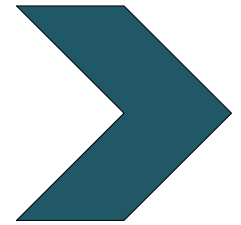
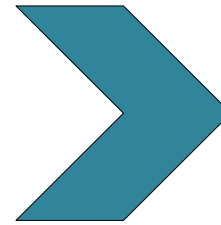
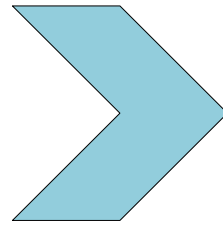
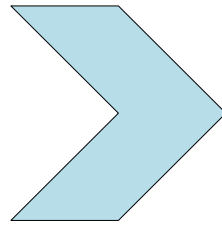
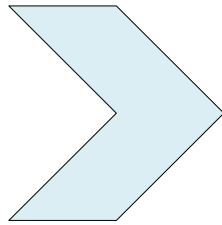
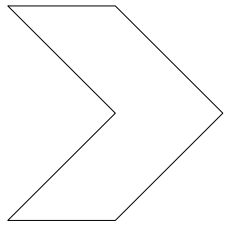
## Education

- 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

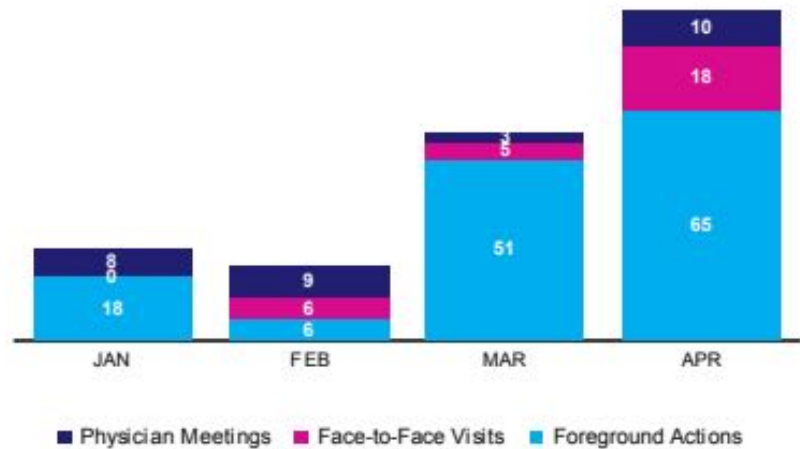


# New Model Activity Report

## Major Gifts Prospects by Status

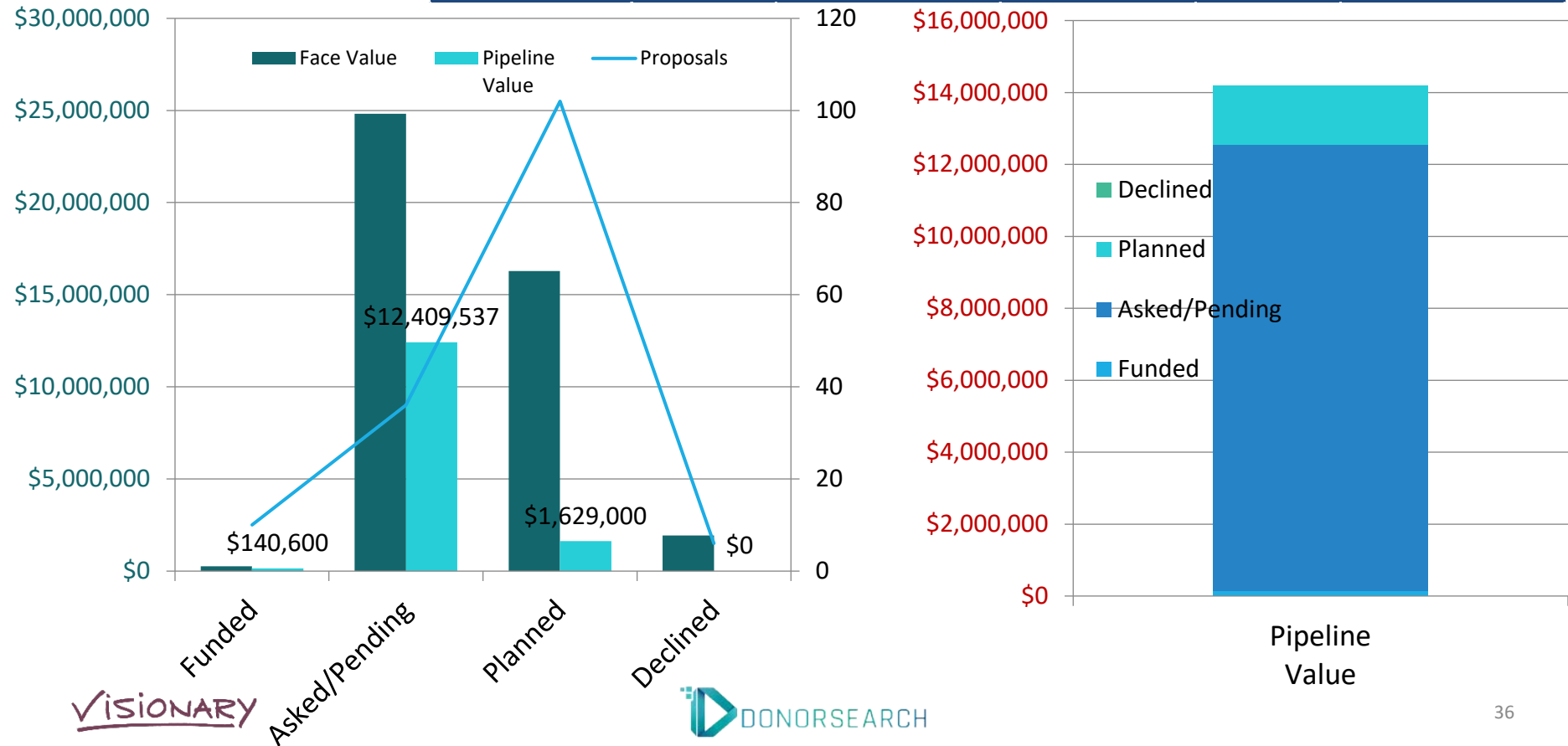


## Face-to-face visit & foreground activity summary



# 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
<b>Total:</b>	<b>154</b>	<b>\$43,295,522</b>	<b>\$148,000</b>		<b>\$14,179,137</b>



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Evidence of Success



# Johns Hopkins University Campaign

**\$6.015B Raised**



DONORS	GIFTS	GIFTS OF \$1M+
<b>279,293</b>	<b>878,843</b>	<b>885</b>



**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**



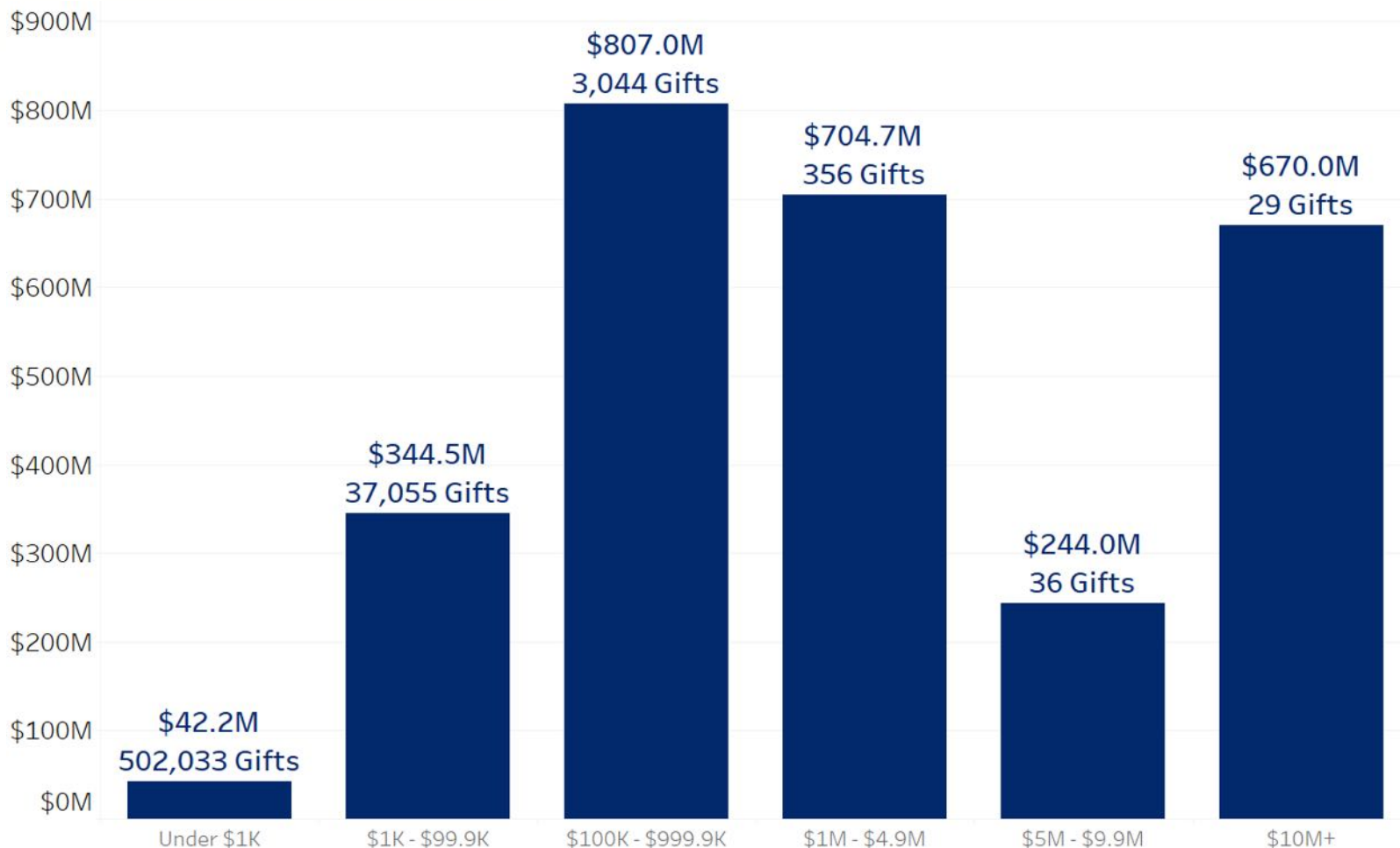
**83**  
**Professorships**



**542,500**  
**Gifts**



# FJHM Campaign Results: Gifts and Pledges by Commitment Size

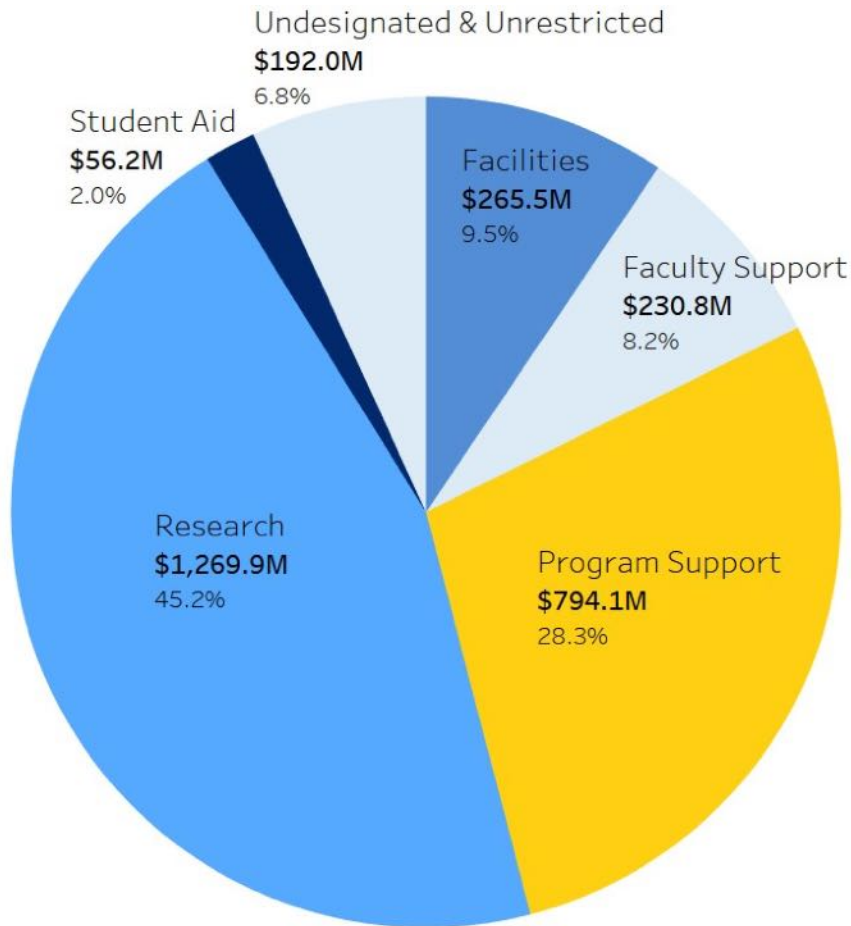




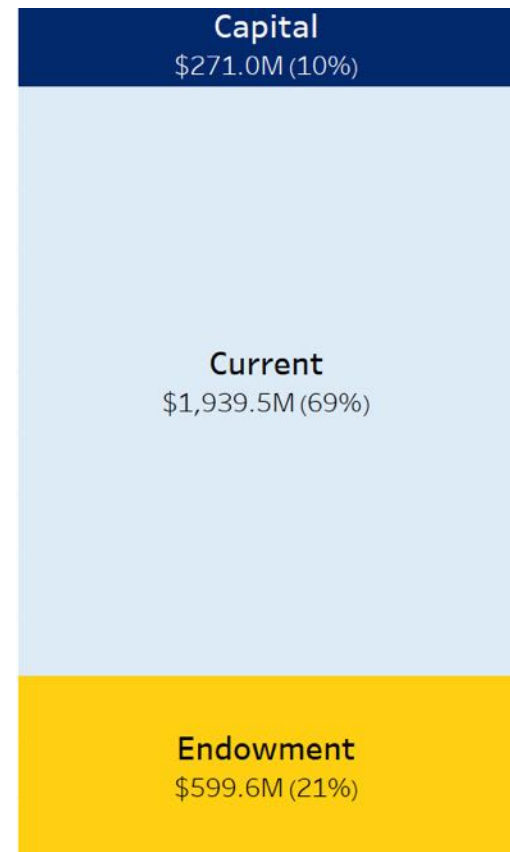


# FJHM Campaign Results: Gifts & Pledges by Purpose and Use

## Purpose



## Use



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Thank you!



For more information contact  
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