

# MOVING FROM EVENT-DRIVEN TO MAJOR-GIFTS ORIENTED STRATEGY

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# Our Presenting Organizations



**Marts&Lundy**



# Dayton Children's Hospital Foundation



**Hospital Founded 1967** Foundation serves as philanthropic arm of 170-bed independent, freestanding specialty pediatric hospital

**Located in Dayton, Ohio** with a 20-county service area

**Staff: 16 FTEs** Executive Director, Dir. of Major & Planned Gifts, Director of Donor Engagement, 3 MGOs, six annual giving-related, two data and gift processing, and one administrative professional

**Foundation board of 20** that is shifting from an advisory body to more active fundraising

**Two major annual events** (golf outing and festival of trees); one bi-annual gala and recently completed \$27.3M capital campaign

# St. Peter's Health Foundation



## Foundation established in 1978

To encourage and manage philanthropic contributions to St. Peter's Health (a community hospital established in 1883)

## Located in Helena, MT

Five county service area encompassing 11,026 square miles with an estimated population of 97,000

## Staff of five

Executive VP, Director of Development & Major Gifts, Director of Annual Giving & Special Events, Grant Writer, Foundation Coordinator

## Endowment of approximately \$14 million

## Historically an event-based philanthropy platform

# Mary Bridge Children's Foundation



**Founded 1986** with a mission to provide the care children need, regardless of ability to pay.

**Located in Tacoma, Washington** with a focused service area of southwestern Washington, now expanding across the state

**Staff:** Executive Director, 2 MGOs, shared board coordinator, shared donor coordinator, and shared back office services (communications, grants, data, gift processing, etc.)

**Endowments of \$80 +million**

**Fundraising board of 23 and two major annual events**

# Marts & Lundy



# Making Distinctions - Misperceptions



**Hard to make a paradigm shift when the perception of what we do does not align with the reality of what we do!**

**“Development team throws great parties!”**

**“Not approved in the budget? That’s OK; we have our foundation fund we can use!”**

**“Philanthropy is a nice-to-have, but really don’t see it as a must-have”**

# Making Distinctions - *The “Why”*



## *Events*

- Generates slow revenue growth
- High cost in both time and expenses
- Transactional
- Create volunteer opportunities
- Engage and cultivate major donors and prospective leadership
- Act as a public relations and messaging platform

## *Major Gifts*

- Generate significant increases in revenue year over year
- Improved CPDR / Higher ROI
- Relational
- Opportunity to engage and educate administration, board and medical staff
- Support long-term growth and strategic priorities



## *Making Distinctions –The Cons of Events*

- Staff burnout / time consuming
- Political / disgruntled volunteers
- Costly with low ROI
- Opportunity Costs: Events do not help evolve how the board and CEO think about philanthropy; staff time focused on events at expense of strategies that generate more revenue at lower cost!

# Case Studies / Testimonials



*Kristin Barsness, Executive Director, Mary Bridge Children's Foundation*

## The Challenge

- Two standing events, both lasting several days
- Heavy on logistics and high in cost
- 2013-14 benchmarking study showed that 52% of total budget was spent on events that generated just 21% of total revenue
- Goals: reduce costs, focus on the mission, improve guest experience

# *Case Studies / Testimonials*



Karin Olsen, Executive Vice President,  
St. Peter's Health Foundation

- Four annual fundraising events
- Discontinued the Gala after 26 years - low ROI
- Some events are needed to fill your MG pipeline
- Golf tournament, Pinwheel Pledge (Cancer), Light A Life (Hospice)

# *Moving Forward - Where to Begin*



## **1. Plan & Build Consensus**

- Understand organizational priorities and how foundation can play a role
- Build internal alignment first, then external
- Establish your key drivers/metrics to measure success

## **2. Execute the Shift**

- Introduce events as a vehicle and step in the process, but not as the solution
- Launch, gather feedback, report out, repeat

## **3. Focus on Your Endgame**

- Find early wins
- Involve volunteers, CEO, providers from the start

# *Moving Forward - Plan & Build Consensus*



## **Step 1: Understand Where You're Starting**

- Define the “Why” for special events and provide data to back it up!
- Inventory and evaluate existing events, staffing, volunteer structure, CPDR, strategy and answer the questions mentioned above
- Establish how you will measure success with your new strategy (dollar goals, revenue or attendance metrics, net revenue, etc.)
- Develop a plan and SWOT analysis with budget and financial projections
- If you're reducing or eliminating events and revenue, show how you will recoup that gift income

## Step 2: Build Internal Consensus

- Start with your CEO, CFO, board, key staff
- Educate these leaders: review your SWOT, projections, and goals; help them understand the benefits of major gifts
- Be prepared: think through the tough questions you anticipate and have the answers

## Step 3: Build External Consensus

- Reach out and involve/seek input from all key stakeholders
- Be respectful: nothing will undermine your efforts more quickly than volunteers who feel their power and identity has been swept away without consultation
- Build a task force to help guide the process of change and recruit a volunteer who gets it as your spokesperson/chair
- Remember that you won't please everyone, but also won't be on an island alone

# Moving Forward - Execute the Shift



## Step 4: Launch your new strategy & end the old

- Execute your plan; end the event or reframe and reconfigure it
- Build your major gifts strategy and program *simultaneously*. Do not wait until the event work is done or you will not have time to build pipeline
- Gather feedback from key stakeholders and report back on the success of your new strategy. The more you report on major gift activities and/or enhanced event results to the CEO, Board, and volunteers the more they will pay attention and start to understand



# *Moving Forward - Next Steps*



## **Step 5: Get Some Wins**

- Make it easy for your CEO, medical staff, and volunteers to be involved in major gift activities. Start by involving them in strategy and stewardship. Celebrate all major gifts by recognizing those who were involved, even if it was in the smallest way.

## **Step 6: Use Events Strategically**

- Organize pre- and post-event strategies with your major gift team and events team. This will help cross train your events team on the art of major gifts
- Develop event strategy with your volunteers, CEO and medical staff - have them complete three moves with three different prospects
- Wealth screen all event attendees
- Ensure proper follow-up

# Key Takeaways

- Plan and build consensus—internal and external
- Design major gifts program and metrics at the same time you are changing the event
- Execute changes swiftly
- Report back consistently and often

# Contact Information



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# Questions / Comments

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