

HILLARY LYONS

A S S O C I A T E S



NHA 91st Annual Convention
People, Passion and Purpose
October 24, 2018
La Vista, Nebraska



**Working Together
to Achieve
One Goal**

Presented by:

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Let's Get to Know You

- Foundation/Volunteers/Marketing and Public Relations
- Corporate System/Independent
- Metro/Rural
- Sole Community Hospital
- Small Shops

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Your Challenges

- Foundation
- Volunteers
- Marketing/Public Relations

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What is our Common Goal?

That the Community:

- Gets to Know Us
- Gets to Like Us
- Chooses Us
- Becomes Our Advocates

Collaborating Together:

- Utilize the organization's strategic plan to drive your work.
- Everyone must work to promote the organization's mission, vision and values.

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Relationship Building

Department goals:

- Marketing - increase community awareness and knowledge. Create value. Improve market share.
- Volunteer - increase community engagement to promote the donation of time and service.
- Foundation - increase community engagement to promote the donation of financial resources.

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Relationship Building

Create a collaborative plan to impact all three department goals, through the use of:

- Patient testimonials
- Education of those closest to us
- Educational seminars
- Social media
- Web
- Events

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Without a Culture of Philanthropy

Issues:

- The cycle of “Underdevelopment” in non-profits
- Absence of sustainable fundraising systems
- Lack of understanding throughout the organization
- Focus only on dollars raised
- Does not build relationships

Source: Beyond Fundraising: What Does It Mean to
Build a Culture of Philanthropy by Cynthia Gibson

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Creating A Culture of Philanthropy

- Culture is the most important factor in determining success
- Increase donor giving and retention
- Strengthen relationships and engagement among board members, staff members and volunteers
- Align mission and program goals with revenue generation
- Understanding of the value of philanthropy throughout the organization

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Philanthropy Truisms - Giving USA 2018

CONTRIBUTIONS

| | <u>2017</u> | <u>2016</u> | <u>% of Total</u> | <u>% Change</u> |
|---------------------|-------------|-------------|-------------------|-----------------|
| <u>Total Giving</u> | \$410.02 | \$388.70 | | +5.2% |
| Individuals | \$286.65 | \$271.74 | 70% | +5.2% |
| Foundations | \$66.90 | \$62.89 | 16% | +6.0% |
| Bequests | \$35.70 | \$34.89 | 9% | +2.3% |
| Corporations | \$20.77 | \$19.11 | 5% | +8.0% |

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Philanthropy Truisms

Years of Giving between 1st Gift and 1st Five-Figure Gift

| | |
|------------|-----|
| 1-2 years | 10% |
| 3-5 years | 12% |
| 6-8 years | 13% |
| 9-12 years | 20% |
| 13+ | 45% |

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Philanthropy Truisms

What Was the 1st Gift for a Five-Figure Donor?

| | | | | | |
|-------------------|-----|--|-----|--|-----|
| \$1-\$24 | 18% | | | | |
| \$25-\$49 | 14% | | | | |
| \$50-\$99 | 15% | | 47% | | |
| \$100-\$249 | 23% | | | | |
| \$250-\$499 | 8% | | | | |
| \$500-\$999 | 4% | | | | 82% |
| \$1,000-\$2,499 | 7% | | | | |
| \$2,500-\$4,999 | 3% | | | | |
| \$5,000-\$9,999 | 2% | | | | |
| \$10,000-\$24,999 | 5% | | | | |
| \$25,000+ | 1% | | | | |

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Philanthropy Truisms - Case Example

Planned and Estate Gifts

- 116 bed regional hospital, serving large central area of Nebraska
- Farm/Ranch communities - conservative; changing market
- Received five planned/estate gifts between 1994-2011
- Between 2012-2015, received three additional estate gifts:
 - Donor 1 - \$150,880 Undesignated Largest gift - \$20
 - Donor 2 - \$500,416 Cancer/Hospice Largest gift- \$50
 - Donor 3 - \$483,428 Cancer/Cardiology Largest gift - \$75

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Creating A Culture of Philanthropy

- Shared responsibility for development
 - Everyone connected to the organization is an ambassador
 - Fundraising does not rely on one person or department
- Integration and alignment with mission
 - Viewing fundraising as a way to achieve larger organizational goals and ultimately the mission
 - It's not just about money, it's about relationships

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Creating A Culture of Philanthropy

- Focus on fundraising as engagement
 - Donors give *through* an organization that reflects their goals, they want a meaningful connection
 - *All* gifts are important
 - Donations come *after* engagement
- Strong donor relationships
 - Donors are seen as investors and partners
 - Donors can contribute in ways other than money
 - Promoting our message to the broader community

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Getting Started - Organizational Family

Employee Giving

- If we can't convince our employees to give back, how do we convince the community?
- Often overlooked potential
- Grassroots effort/Employee-driven
- Focus on participation, not dollars raised
- Bottom line - *Employees Supporting Our Mission*

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Employee Giving - Case Example

2013 - Held first employee campaign in 10 years.

Approximately 800 employees - Healing Garden project

- 317 donors in 2013 (\$44,678)
- 172 donors in 2014 (\$76,428)
- 76 donors in 2015 (\$34,525)
 - No retention plan

2016 - 1st annual Spirit Week - led by employee committee

Approximately 1,000 employees - Emergency Department project

- 491 employees made a gift, majority ongoing payroll deduction
 - Raised \$108,977 in pledges/gifts (total w/out including admin/physician gifts)
 - Helped improve employee morale through recognition events/celebrations
 - Enhanced internal knowledge of Foundation's mission
 - Employee committee chooses project for better buy in; not administratively driven

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Collaboration Opportunity

- Develop Key Messages for the Employee Drive
 - Mission focus
 - Nice, but not elaborate materials- grass roots
- Utilize Volunteers to Assist with Preparation for Employee Drive
 - Engagement with employees
- Develop Marketing Plans to Celebrate and Promote Success
 - Success with employees leads to success with the community
 - Tell our story

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Getting Started - Organizational Family

Volunteers

- They have chosen to help us.
- They want a meaningful job.
- They know what is going on in our organization.
- Their input as a constituency is under-utilized.
- If a volunteer isn't doing what we want them to do, our opportunity is not fulfilling their needs.
- We need to make it an honor to volunteer for us.
- If they raise money for us, this is not in competition with the Foundation.
- If they give their time, they are more inclined to give their money.

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Volunteer Recruitment

- Solicit current volunteers for help
 - Form a committee within the auxiliary that is responsible for recruitment efforts
- Speak at civic organizations
- Host events and ask volunteers to bring a friend
 - Recipe swap
 - Wine and cheese
 - Coffee and rolls
- Utilize chaplain services for church contacts
- Facebook and other social media sites
- Advertise internally

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Foundation Volunteers

- Create New Opportunities Working with the Foundation
 - Provides a different type of volunteer opportunity
 - Engages more people and talents
 - Builds stronger connections to the community
- Ways Volunteers Can Work with the Foundation
 - Coordinate community health seminars
 - Coordinate business seminars
 - Special events
 - Not just fund-raisers
 - Donor cultivation
 - Donor recognition
 - Donor recruitment
 - Would you join me in supporting the hospital?
- Community Forums

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Collaboration Opportunity

- Brainstorm with Key Hospital Leaders, Foundation Board Members, Engaged Volunteers
 - Who in the community do we need involved with us to be successful?
- Utilize Volunteers in Planning Events to Promote Marketing Initiatives
 - If community members are involved in the planning, it will guarantee good attendance.
- Focus Groups
 - They know what is being said about us in the community
 - They have ideas about how we can improve
 - Give them the tools to be our ambassadors in the community
 - Ask for money, get advice. Ask for advice, get money.

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Volunteers as Ambassadors - Case Example

- Less than 100 Bed Hospital
- Community of 20,000
- One Hour from Kansas City
- Battling “Sole Community Hospital Syndrome”
- Engaged Foundation Volunteers to Host Community Forums
 - Local manufacturing company executive: “I would always choose Kansas City”.
 - Local car dealership owner: “The hospital is building and growing, but I don’t understand why. The care is still poor”.

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Volunteer Recognition, Engagement & Retention

- Recognition
 - Beyond the usual stuff
 - Needs to be thoughtful and unexpected
 - Needs to be sincere
- Engagement and Retention
 - Good orientation: tour, CEO presentation
 - We need to find their motivation for volunteering
 - Set measurable goals, provide regular updates
 - Give them manageable tasks
 - They want something to do
 - Help them be successful
 - Mission moments

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Volunteer Recognition

- Mirror the hospital's approach for recognizing employees and physicians - whatever they do, do it for volunteers
 - For example, send out birthdays and hospital anniversaries dates in the hospital's weekly/monthly communication
- Award volunteers with a nice meal for certain milestones, allow them to bring a guest
- Send handwritten thank you notes, birthday and hospital anniversary cards
 - Include coupon (Foundation donors) in the birthday and/or anniversary card
- Provide a multitude of communication and educational opportunities
 - Daily huddles
 - Monthly information sessions
 - Quarterly Lunch and Learns
 - Provide lunch and invite a guest speaker for the hospital to talk about their department or service line
- Highlight volunteer superstars in front of other volunteers
- Say thank you and then say thank you again (say it often)

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Collaboration Opportunity

- Regular CEO Communication
- Socialization Opportunities
- Dedicated Phone/Email for Questions and Concerns
- Hand-written Thank-yous
- Health Screens
- Volunteer Profiles in Publications, Web Page, Social Media
- Thank-you Letter to their Spouse/Employer for Supporting the Volunteer in Giving Us Their Time

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Getting Started - Recruiting New Annual Donors

- Tangible Projects
- Cultivation
 - Coffee and conversation
 - Special invitation to events
 - What would resonate with their friends and family?
- Face-to-Face Gift Requests
 - Top reasons people give:
 - 1. Influence of solicitor
 - 2. Volunteer leadership is well respected
 - 3. Interest in the project
 - Top reasons people *don't* give:
 - 1. They were not asked
 - 2. No relationship/connection to the solicitor
 - 3. Unspecified amount or range of gift
- Mailings

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Collaboration Opportunity

- What are the Key Messages?
 - How does the project fulfill a community need?
 - Why is it needed now?
- Planning Events
 - Is there a role for a volunteer?
 - Can volunteers help us connect to new people?
 - Can we do something new or different as suggested by volunteers?
- What Tools do Volunteers Need to Help Us?
 - Thoughtful, individualized gift request to make their own gift
 - Gift request training
 - Would you join me in supporting this cause?
- Preparation of Mailings
 - Volunteers sign and personalize letters
 - Marketing help prepare materials
 - Volunteer help prepare mailings

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Case Example: Minutes Matter Campaign

Goal: Raise \$3.5 million in a twelve month period

Collaborative efforts between Marketing and Foundation:

- Create your case statement, project materials and talking points.
- Marketing should provide consistent updates through press releases and media interviews, PSA's and civic organization presentations.
- Educational seminars - always include Foundation materials and promotion.
- Manage patient testimonials. Can utilize for service line promotion and fundraising.
- Community or Business roundtables - tell our story and begin cultivation.
- Internal communication - include Foundation updates in employee updates.

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Case Example - Minutes Matter Campaign

Collaborative efforts between Volunteers and Foundation:

- Keep Foundation education and knowledge a priority among volunteers.
- Involve them as part of the organizational family and activities.
- Highlight volunteer/foundation updates in newsletters.
- Utilize volunteers at Foundation events and with mailings, etc.
- Ask them to support the Foundation with a financial gift.
- Volunteers can assist with Foundation projects:
 - Comfort Cart
 - Clothing Closet

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Donor Retention

- Treat Them Like Investors
- Keep Them Informed and Connected
- Maintain Contact Through a Variety of Methods
- Show Them the Difference They Made
- Have a Good Renewal Process
- Track Renewals

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Collaboration Opportunity

- Develop Marketing Plans to Promote the Impact of Annual Gifts
- Utilize Donors in a Variety of Ways to Keep Them Engaged
 - Promote current marketing messages
 - Share latest/greatest
 - Ask for their input
- Utilize Volunteers to Contact Donors Asking Them to Renew

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Donor Recognition

- Listening
 - What was the donor's motivation for giving?
 - What are the donor's expectations?
- Appreciation/Recognition
 - How can we uniquely thank our donors?
 - Show them the impact of their gift.
- Involvement
 - Do they want to do more than give?
 - Volunteer
 - Open doors
 - Give input and feedback
- Renewals/Upgrades
 - Giving is a habit

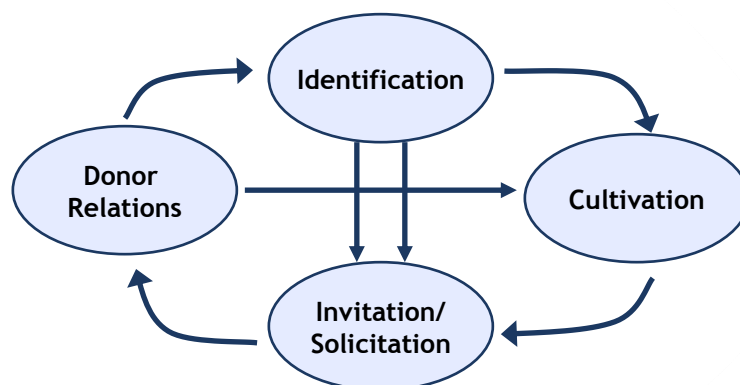
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Collaboration Opportunity

- Develop Overall and Annual Recognition Plan
 - Beyond the basics
 - Ask volunteers for input on what would resonate with annual donors
 - CEO communication
 - Impacted clinician communication
 - Special invitations to events
 - Donor profiles in publications, web page, social media

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Donor Process



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Thank You!

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