



MAJOR GIFT PROSPECT CULTIVATION, STRATEGY DEVELOPMENT AND TRACKING

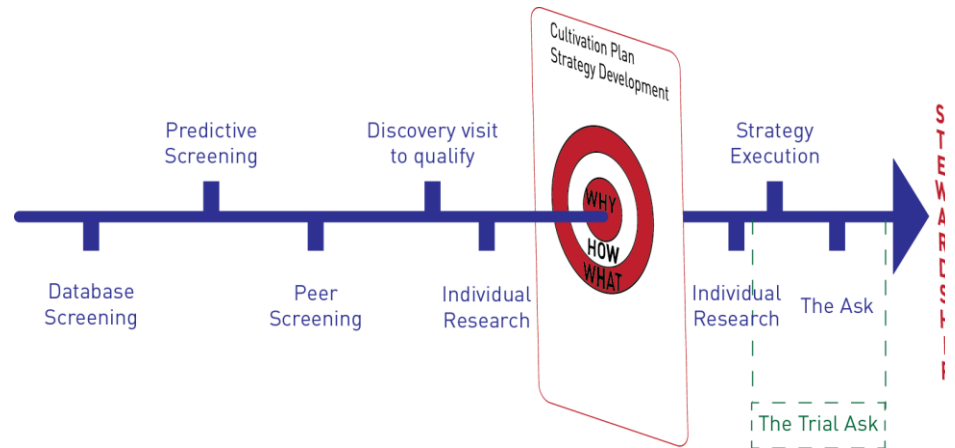
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Gary J. Hubbell
Gary Hubbell Consulting
414-962-6696
www.garyhubbellconsulting.com

CLARIFYING THE FOCUS OF OUR DISCUSSION



The under-attended bulls-eye



WHAT WE NEED IS HERE



The Wild Geese

Horseback on Sunday morning,
 harvest over, we taste persimmon
 and wild grape, sharp sweet
 of summer's end. In time's maze
 over the fall fields, we name names
 that went west from here, names
 that rest on graves. We open
 a persimmon seed to find the tree
 that stands in promise,
 pale, in the seed's marrow.
 Geese appear high over us,
 pass, and the sky closes. Abandon,
 as in love or sleep, holds
 them to their way, clear,
 in the ancient faith: what we need
 is here. And we pray, not
 for new earth or heaven, but to be
 quiet in heart, and in eye
 clear. What we need is here.

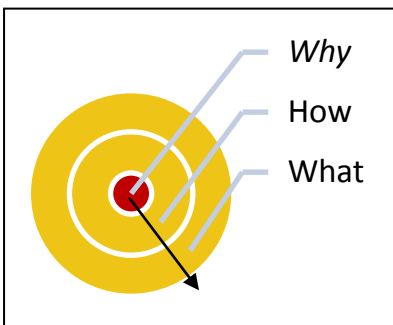
~ Wendell Berry ~

GARY GETS HIS RANT ON



1. Research shows people want authentic engagement and meaningful experiences—and we ignore this and make our work harder and then wonder why “they” won’t play nice!
2. Donor-centered desires (Burk)
 - a) Say thanks promptly and sincerely
 - b) Tell me how my gift will be used
 - c) Before resoliciting me, tell me what was achieved with my gift
3. Authenticity
 - a) Implicit v. Explicit Rewards
 - a. Autonomy
 - b. Mastery
 - c. Purpose

CULTIVATION STRATEGY - BEGIN WITH WHY



1. Golden circle concept
 - a) WHY would she consider a significant gift?
 - b) HOW would interest manifest over time?
 - c) WHAT to do to foster movement and behavior?
2. Imagine my work IF...
 - a) I knew the answer to interest, range, & readiness
3. Cultivation requires knowing what to learn
 - a) Plan makes the learning agenda clear
 - b) (See sample – handout)

SAMPLE MAJOR GIFTS STRATEGY WORKSHEET

RUPERT DONOR

ADDR

CSZ

Gift Rating: \$1-5 million

Readiness: 4 (1-5 scale with 1=Ready)

Target Interest: Naming opportunity – possibly endowment

Known Relationships/Connectors:

- Chris Smithers (Chief Development Officer)
- Tina Brown (board member)
- Dr. Marcus Smith (medical staff)
- Alice Kimoto (CEO)

Important Strategy Elements

- Longstanding patient of Dr. Smith's
- Lifelong Chicago resident
- 71 years old
- Lives downtown and also has a Palm Springs home
- Wife (Ruth) recently deceased
- Multi-year pledge satisfied recently
- Long-term donor – annual gifts in the \$500-\$1,000 range
- Ruth's estate made a gift to Sample Hospital of \$50,000 –designated to the health sciences program
- Ruth's estate created a private foundation – it will distribute approx. \$600K/year
- Ruth was a former Hospital board member
- Rupert has a great love of children's health
- Interests: Rupert – endowment; Ruth – children and family; both – recognition and personal attention
- He is very lonely since Ruth's passing
- Children may work to block a significant gift

RUPERT DONOR *(continued)*

| Objective 1: Achieve a closer relationship with Rupert independent of Ruth's relationship | |
|---|-----------------|
| Step | Deadline |
| 1. Tina Brown (BOD) plays golf with him and talks about hospital | 7/07 |
| 2. Use the annual banquet as a way to celebrate past gifts from him and Ruth | 10/07 |
| 3. C. Smithers (CDO) sees him to seek his advice and counsel on strategic plan and future directions for the organization | 8/07 |
| 4. Invite him to Christmas at a program site | 11/07 |

| Objective 2: Give him an active role in a meaningful advisory position | |
|---|-----------------|
| Step | Deadline |
| 1. Invite him to host a small group meeting | 1/08 |
| 2. Have him meet with CEO regarding the current status/direction of hospital | 2/08 |
| 3. Smithers (CDO) to engage him in the strategic thinking process in 2008 | 3/08 |
| 4. With A. Kimoto (CEO), enlist him to serve on the health program advisory council | 5/08 |

| Objective 3: Identify his target area of interest | |
|--|-----------------|
| Step | Deadline |
| 1. Interview our identified relationships to uncover issues and opportunities | 12/07 |
| 2. CDO/CEO to review with him the hospital master plan | 2/08 |
| 3. Test our conclusions about his interest areas with him | 3/08 |
| 4. Talk with him about his and their past gifts: what motivations/goals prompted them? | 6/08 |

| Objective 4: Engage his children | |
|--|-----------------|
| Step | Deadline |
| 1. Meet with each individually to discuss the important outcomes from their parents' past generosity | 8/08 |
| 2. Invite them both to the Gala Event, pairing them with existing major donors | 1/09 |
| 3. Include them appropriately in gift designation and naming discussions | 6/09 |

Target Solicitation Date: 9/09

Strategy Developed By: _____ Date: _____ Review Date: _____

_____ HOSPITAL
 Target Solicitation Date: ____ / ____ / ____

| CONTACT INFORMATION | | |
|-----------------------|-------------------------|-----------------------|
| Prospect Name: | Age: | Capacity Gift Rating: |
| Spouse: | Age: | |
| Home Address: | | |
| City, ST, Zip | | Readiness: |
| Phone: | E Mail: | |
| Cell: | Fax: | |
| Business Address: | | |
| City, ST, Zip | | Target Interest Area: |
| Phone: | | |
| 2 nd cell: | 2 nd E Mail: | |

| KNOWN RELATIONSHIPS | |
|---------------------|--------------|
| Name | Relationship |
| ▪ | ▪ |
| ▪ | ▪ |
| ▪ | ▪ |
| ▪ | ▪ |
| ▪ | ▪ |

| GIVING HISTORY | | | | | |
|----------------|--------|---------|-----------|-------|-------|
| Year | Annual | Capital | Endowment | Other | Total |
| 2011 | \$ | \$ | \$ | \$ | \$ |
| 2010 | \$ | \$ | \$ | \$ | \$ |
| 2009 | \$ | \$ | \$ | \$ | \$ |
| 2008 | \$ | \$ | \$ | \$ | \$ |
| 2007 | \$ | \$ | \$ | \$ | \$ |

Other Significant Gifts:

IMPORTANT STRATEGY ELEMENTS

(donor data, prior annual, capital and endowment history, Analytics data, interests, involvement & connections to the Hospital, involvement with their area of interest, church involvement, etc.)

| |
|---|
| ▪ |
| ▪ |
| ▪ |

WHY do you believe this prospect would consider a significant gift to our institution?

OBJECTIVE OR OUTCOME 1:

HOW would this prospect's growing interest become manifest over time (likely in numerous ways)?

Steps...or WHAT would we need to do to bring about that movement and behavior in this prospect?

Deadline:

| | |
|----|--|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |

OBJECTIVE OR OUTCOME 2:

HOW would this prospect's growing interest become manifest over time (likely in numerous ways)?

Steps...or WHAT would we need to do to bring about that movement and behavior in this prospect?

Deadline:

| | |
|----|--|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |

OBJECTIVE OR OUTCOME 3:

HOW would this prospect's growing interest become manifest over time (likely in numerous ways)?

Steps...or WHAT would we need to do to bring about that movement and behavior in this prospect?

Deadline:

| | |
|----|--|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |

OBJECTIVE OR OUTCOME 4:

HOW would this prospect's growing interest become manifest over time (likely in numerous ways)?

Steps...or *WHAT* would we need to do to bring about that movement and behavior in this prospect?

Deadline:

| | |
|----|--|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |

OBJECTIVE OR OUTCOME 5:

HOW would this prospect's growing interest become manifest over time (likely in numerous ways)?

Steps...or *WHAT* would we need to do to bring about that movement and behavior in this prospect?

Deadline:

| | |
|----|--|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |

OBJECTIVE OR OUTCOME 6:

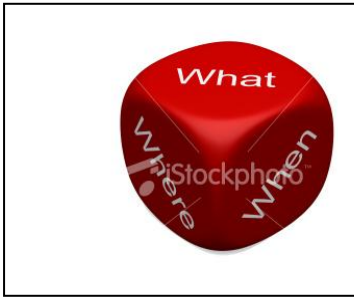
HOW would this prospect's growing interest become manifest over time (likely in numerous ways)?

Steps...or *WHAT* would we need to do to bring about that movement and behavior in this prospect?

Deadline:

| | |
|----|--|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |

LESS YOU TELL; MORE YOU ASK



1. Purposeful engagement and intentional discovery
2. Must be focused on the donor's learning agenda, NOT on the gift
3. Trial asks
 - a) Have we discussed her gift interest area (e.g., cancer, heart, endowment, memorial, etc.)
 - b) Have we discussed a proposed dollar range for her gift?
 - c) Have we discussed timing considerations for when she would accept a proposal?
 - d) What is my assessment of her readiness to make a gift (1-best thru 5-least ready)

TRACKING STRATEGY IMPLEMENTATION IN TEAM



1. Moves meetings – why bother?
 - a. To foster a disciplined approach
 - b. To provide problem-solving
 - c. To provide self-imposed (peer team imposed) pressure points
 - d. To develop cultivation strategy
2. Meeting logistics
 - a. How long, how often
 - b. Agenda options and type of participation
 - c. Implicit v. Explicit Rewards – (Yes, again!)
 - i. Autonomy
 - ii. Mastery
 - iii. Purpose

QUESTIONS, COMMENTS, AND CLARIFICATION



HOW CAN WE PARTNER WITH YOU?



Many thanks to the Providence Health & Services clients with whom we've partnered:

- Providence Alaska Foundation (*Anchorage, AK*)
- Providence Community Health Foundation (*Medford, OR*)
- Providence Foundations, San Fernando & Santa Clarita Valleys (*CA*)
- Providence General Foundation (*Everett, WA*)
- Providence Little Company of Mary Foundation (*Torrance, CA*)
- Providence Medical Foundations – Oregon (*Portland, OR*)
- Providence Hood River Memorial Hospital (*Hood River, OR*)
- Providence Milwaukie Foundation (*Milwaukie, OR*)
- Providence Newberg Health Foundation (*Newberg, OR*)
- Providence Urban Hospitals Foundation (*Spokane, WA*)

Gary Hubbell Consulting works with organizations on the cusp of doing great things – retooling business income and philanthropy strategies; engaging board members and community in unprecedented ways; raising more money than ever before. Clients contact us seeking help to develop strategies that foster organizational agility, setting a plan in place around which commitment runs deep, and determining how to generate philanthropy and other resources to fuel the resource engine of the future.



philanthropy ▲ strategy ▲ planning ▲ coaching

P.O. Box 510257 ▲ Milwaukee WI 53203 ▲ 414-962-6696 ▲ www.garyhubbellconsulting.com

