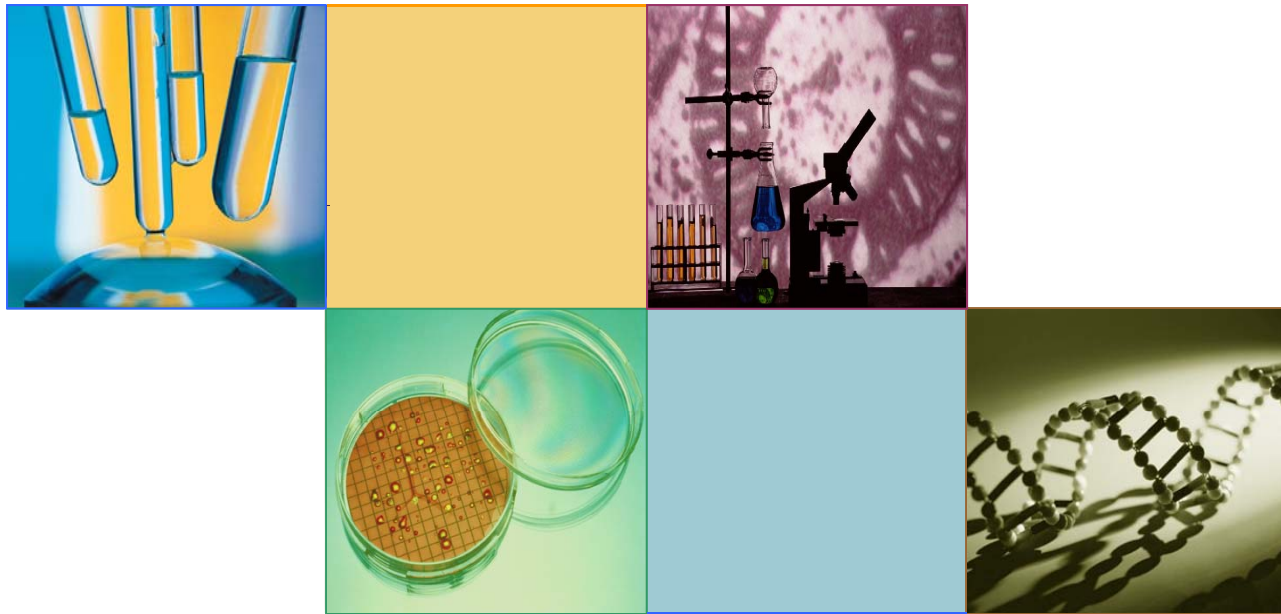


Prospecting and Qualification: The Process, The Team, The Successes and The Pitfalls

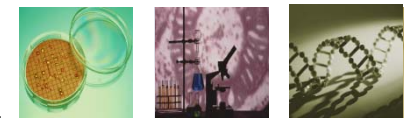


UW Medicine

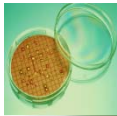
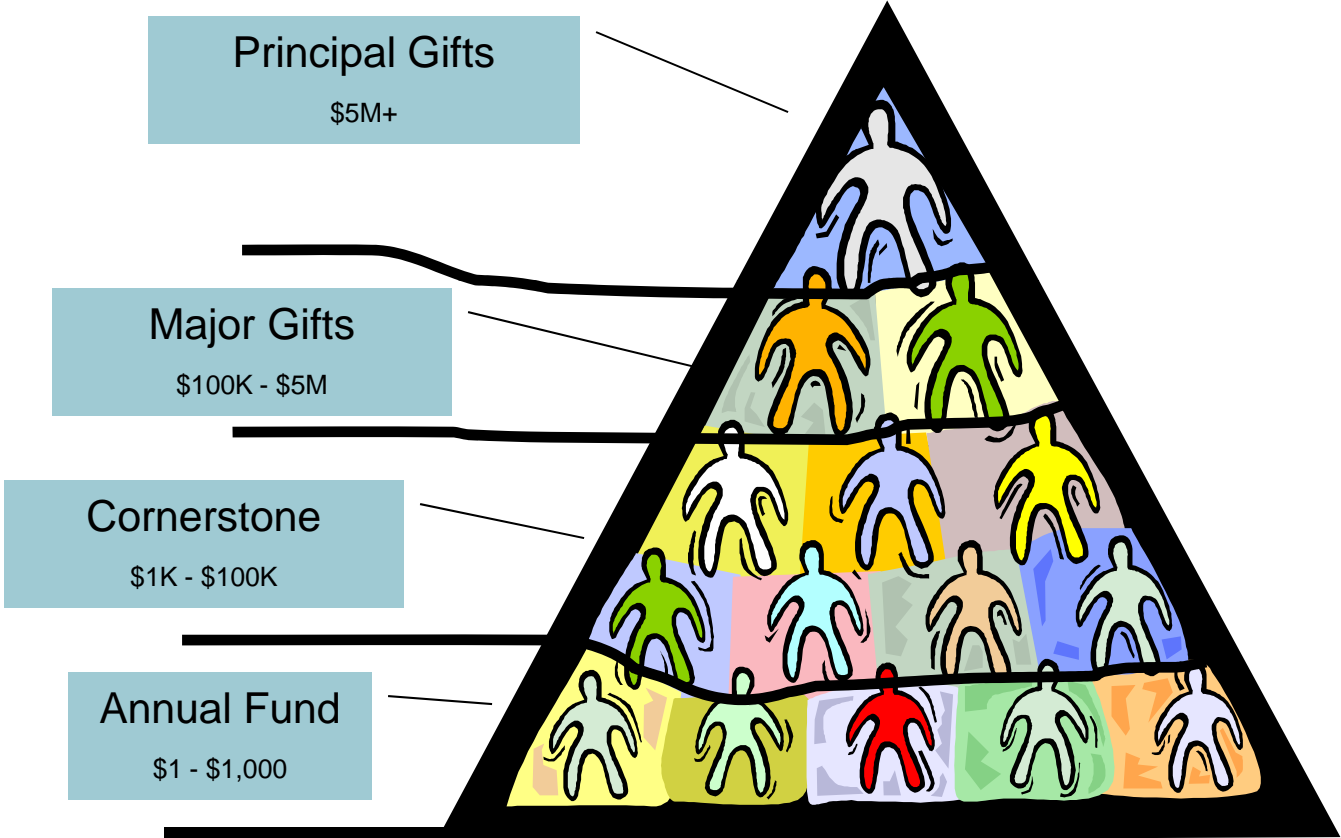
DISTRICT
CASE VIII

Agenda

1. Brief of UW Medicine's Campaign
2. Finding and hiring MGOs
3. The creation of the Cornerstone team
4. The evolution of the Cornerstone team
5. The actual qualification process we use
6. Our gained wisdom



Campaign Brief



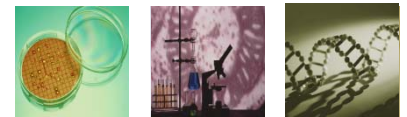
Campaign Brief

Reviewed revenue projections, portfolio sizes and compositions.

We were relying on DM and referrals from our faculty.

Basically we had picked all of the low hanging fruit.

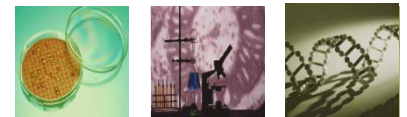
MGO portfolios were OK, not maximized, need to be more proactive.



Campaign Brief

Our donor constituency is comprised of:

Past and Current Faculty
Patients
Medical School Alumni
General University Alumni
Community Members
Residents, PhDs, Fellows
Parents
Staff



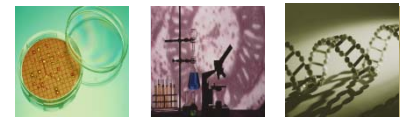
Campaign Brief

Launched donor acquisition effort:

List Rental

Expanding our patient solicitations

Able to build donor base to between 16K and 18K donors.

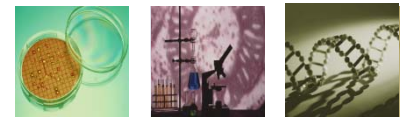


Goal of the Cornerstone Team

Need FLFs to begin work the new leads.

Goal to build pipeline:
For our donors
For our staff

Our long-term vision was that we would be hiring future MGOs.



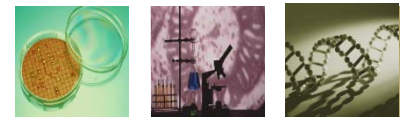
Finding and Hiring MGOs

AAMC conference - discussion on identifying MGOs, hiring and retaining them.

The need for more dollars, leads to a need of more fundraisers.

The chair of the discussion quoted a prediction of a 38% shortage of qualified fundraisers.

In addition to this challenge, there are more non-profits
The nonprofit sector keeps growing -- increasing by roughly 3,000 organizations nationally annually.



Finding and Hiring MGOs

This obviously creates a surge in the need of seasoned fundraisers.

What is the best way to deal with this?

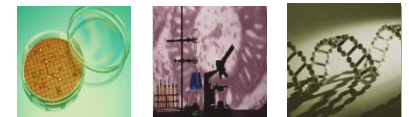
Some organizations (Stanford, UCSF) provide bonuses to their staff if they hire a referral.

Started at \$5K...now up to \$10K.

According to those who utilize this practice, it hasn't really helped.

Hire your own in-house recruiter – UBC, UC Irvine

Train your own – UWM chose the latter

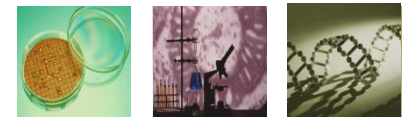


Creation and Evolution

Hired three new staff members.

Their role - begin calling and qualifying these prospects.

Every summer we have adjusted our processes!

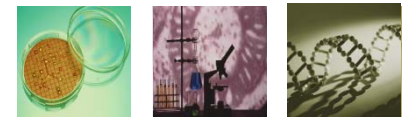


Creation and Evolution

Started by simply cold calling our leads
Introducing ourselves
Getting UWM message out to them
Approximately 100 calls per day
Sluggish progress

It was tough to get people on the phone.
Tough to engage them
Even tougher to secure the visit

We were very quickly going through the leads.
Obviously this was not the most efficient process.



Creation and Evolution

AAMC Conference

Duke has finished their \$2B + campaign

Hired a chemist to conduct post campaign analytics

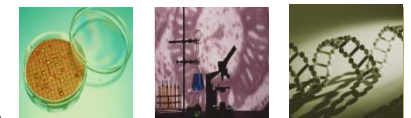
Determine where they succeeded

Determine where they struggled

Determine if any patterns emerged

Profile / Predict future MG donors

The single clearest determining factor of major gift potential was a single gift of \$1,000.



Creation and Evolution

UWM utilizes this information and shifts strategy.
Our CS team focused on \$1K+ donors.

This proved to be VERY successful.
Called, visited, built rapport with donors.
Began truly getting to know the donors and managing relationships.

Before too long, the CS team had developed their own portfolios of donors.

CS team was raising about 90% of our MG team.

YET, our pipeline was being ignored

The good - bringing in new \$

The bad - reduced prospecting - slowed pipeline



Creation and Evolution

Again we adjusted our portfolio composition, size and the priority of the team.

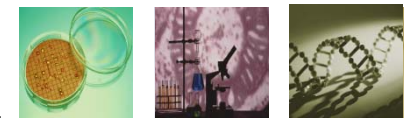
Adjusted expectations

Part-time fundraising, managing portfolio

Part time prospecting

Knee-jerk reaction - Too far of a swing towards prospecting

Portfolio sizes were in the 1,400 range - overwhelming



Creation and Evolution

Again we adjusted our portfolio composition and size.

Cornerstone Portfolio Mngt.

Size determination / definition

Segment	Number in Portfolio	Weighted (based on number of contacts, calls, time, etc.)	
Top 25	25	5	125
Beat Area	50	2	100
Turner Donors	400	3	1200
Alumni Classes	200	2	400
Discovery	<u>75</u>	2	<u>150</u>
	750		1975

20 working days a week
 10 months (12 minus vacations, holidays, etc.)
 $10 \times 20 = 200$
 10 Contacts a day times 200 days equals 2,000 contacts
 10 contacts a day should equal 10 visits a month

750-800 is ideal size for portfolio management. Discovery can always be added.
 Discovery leads are fluid and will continually rotate.

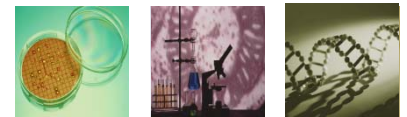


Qualification Process and Expectations

Expectations have varied over the past several years.

The current expectation for the CS team is that they secure 15 visits a month.

Each FLF must enter a contact report when they meet with a donor/prospect.



Qualification Process and Expectations

Prospect Worksheet

Date:
Name:
Advance ID:
Solicitor:
Relationship Manager:
Ask Amount:
Target Ask Date:
Gift Purpose:

High Affinity High Capacity	High Affinity Low Capacity
Low Affinity High Capacity	Low Affinity Low Capacity

QUALIFYING INFORMATION:

Family

Assets

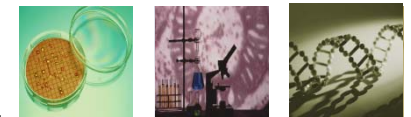
Values

Advisors

Motivations

Career

ACTION PLAN (calendarized):

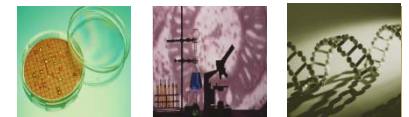


Gained Wisdom

Success will come.
Be ready...plan ahead

Takes time to train.
Review strategies
Read contact reports

This process provides staff retention and career development.
Learning strategies at the beginning
Working with a portfolio
Practice on visits
Potential career path



Closing

“Only a life lived for others is a
life worthwhile. “

Albert Einstein

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