Fundraising and Coalition Building

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Sarah Anderson, Campbell & Company
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@campaign4action
Today’s Webinar

• Results of the Campaign’s survey of Action Coalitions who received fundraising Technical Assistance

• Best practices in developing your case for funder support

• Examples of how to incorporate the Culture of Health into your language and framing

• Using your message to attract new funders and donors

• Q&A

Winifred V. Quinn, PhD
Director, Advocacy & Consumer Affairs
Center to Champion Nursing in America at AARP

www.campaignforaction.org/webinars
Today’s Speaker

Susan Hassmiller, PhD, RN, FAAN
RWJF Senior Adviser for Nursing, and director, Campaign for Action
@suehassmiller @campaign4action

Sarah Anderson
Director of Strategic Priorities
Campbell & Company

Jeff Wilklow
Vice President
Campbell & Company
## Targeted Technical Assistance

### Campbell & Company
- 19 Action Coalitions
- Messaging templates
- One-on-one coaching on messaging and meeting potential funders

### Pitch Perfect
- 13 Action Coalitions
- Messaging templates
- Sue Hassmiller and funder colleagues coach states
100% response rate

- 19 ACs received survey on Campbell & Company assistance
- 13 received survey on Pitch Perfect assistance

Overarching Message:

- Your fundraising skills have improved.
10 of 19 Respondents Made Pitch

- Of these 10:
  - 4 ACs reported giving pitch face-to-face
  - 1 AC reported giving pitch over phone
  - 3 ACs reported using a combination of tactics (phone, letter, email, face to face)
  - 2 ACs did not say how they pitched
ACs Gained Skills To:

- Recruit new organizations outside of nursing to the AC
- Recruit new executive committee or strategic committee members
- Recruit new team members
- Recruit advocacy partners

Other Benefits:

- Shared training with members of their own AC and other ACs
- Gained relationship development and management skills
Of the 10 ACs that pitched, 6 received funding!

How much funding have you received (including grants) since participating in the fundraising program?

<table>
<thead>
<tr>
<th>Money Raised</th>
<th>Number of Action Coalitions</th>
</tr>
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<tbody>
<tr>
<td>$1,001-$5,000</td>
<td>1</td>
</tr>
<tr>
<td>$5,001-$10,000</td>
<td>1</td>
</tr>
<tr>
<td>$10,001-$20,000</td>
<td>3</td>
</tr>
<tr>
<td>$20,000 +</td>
<td>2</td>
</tr>
</tbody>
</table>
5 of 13 Respondents Made Pitch

- Of these 5:
  - 4 ACs reported giving pitch face-to-face
  - 1 AC did not specify
- Of the 8 that have not yet pitched:
  - 4 ACs say they are forming a pitch and/or researching donors.
  - 1 AC is meeting with donor and working to build relationship before pitching.
Survey Results: Pitch Perfect

ACs Gained Skills To:

- Recruit others (organizations outside of nursing, work team members, and advocacy partners)
- Build relationships
- Develop and refine messaging and/or a case for support
- Organize their goals, messaging and approach

Other Benefits:

- Shared training with other AC members
Survey Results: Pitch Perfect

Of the 5 ACs that pitched, 4 received funding!

How much funding have you received (including grants) since participating in a fundraising program?

![Bar chart showing money raised and number of Action Coalitions.](chart.png)
1) Develop relationship with funder
2) Convince funder your work is valuable: align your mission with funder’s goals
3) Meet with potential funders in person before requesting money
4) Share your achievements with funders

Approach funders now to leverage RWJF and AARP brands before SIP funding runs out!
Developing Your Case for Support

- Defining the “case for support”
  
  It’s the **set of messages** that you communicate to **prepare a prospect** for a solicitation.

- The function of the case
  - To **engage and inspire** your audience
  - To **create a rationale** for making a gift
  - To **remove obstacles** that get in the way of a donor/funder commitment
## Structuring Your Case for Support

<table>
<thead>
<tr>
<th>Function</th>
<th>Content</th>
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</thead>
<tbody>
<tr>
<td>Context</td>
<td>Where are we today?</td>
</tr>
<tr>
<td>Impetus</td>
<td>Why does this matter? Why is it urgent?</td>
</tr>
<tr>
<td>Vision</td>
<td>What will be different because of our work?</td>
</tr>
<tr>
<td>Credential</td>
<td>Why are we the right organization to take this on?</td>
</tr>
<tr>
<td>Plan</td>
<td>What will we do with donor/funder support?</td>
</tr>
<tr>
<td>Appeal</td>
<td>What are we asking of our audience?</td>
</tr>
</tbody>
</table>
Context: Where are we today?

Today in our state, thousands of nurses are unable to practice to the full extent of their training.

Today in our state, thousands of people lack ready access to the care they need to lead their healthiest lives.
Examples: Moving Your Messaging Toward a Culture of Health Framework

Impetus: Why does this matter?

When we have provider shortages, people often can’t access the care they need.

OR

This work helps fulfill a critical recommendation of the IOM Report.

When we truly value people’s health and wellness, we create more stable families, more resilient communities and stronger economies.
Examples: Moving Your Messaging Toward a Culture of Health Framework

**Vision:** What will be different because of our work?

By broadening the role nurses can play in caring for people in our state, we will expand patient access to health care.

By focusing on the integral role nurses can play in a changing health care landscape, we ensure that people can get the right care at the right time.
Credential: Why are we the right organization to take this on?

We bring together nursing leaders, educators, policymakers and other stakeholders.

The complex challenge of improving our citizens’ health demands and deserves the best thinking from leaders across our state. We bring these leaders together in a way no other organization can.
Crafting Your Message

Your Case: The **set of messages** that you communicate to prepare a prospect for a solicitation.

Your Message: A **statement** designed to move your audience to a new place

- Understanding
- Inspiration
- Engagement
- **Action**
Crafting Your Message

• Strong, well-defined messages are the building blocks of a strong case for support.

• So what makes a strong message?
  – It makes a compelling claim
  – It creates immediate understanding
Making a Compelling Claim

Take a **position**.

Everyone deserves to live the healthiest life possible.

Pique **interest**.

Health means more than not being sick.

Go **big** or go home.

Nurses have the power to change the trajectory of our state.
Making a Compelling Claim

• Push your messaging to get to the most compelling claim possible
  – An example outside of the Campaign for Action

  Alzheimer’s disease is the sixth leading cause of death in the U.S. and is projected to affect nearly 14 million Americans by 2050.

  Left unchecked, Alzheimer’s disease will deal an unprecedented blow to our economy, our health care system and countless families.

  Alzheimer’s disease is the defining public health challenge of our time.
We are working to promote seamless academic progression to address the evidence-based research that links baccalaureate-prepared nurses to improved patient outcomes.

When nurses choose to further their education, patients receive even better care.
We need to remove legislative barriers to practice that keep nurses from serving health care consumers to the full extent that their training prepares them for.

Nurses are trained to provide more extensive care than the law allows them to today. Updating these laws will ensure that more patients can get the care they need when and where they need it.
Creating Immediate Understanding

Provide a Framework

Our Action Coalition is tackling issues ranging from academic progression to interprofessional collaboration to advance the future of nursing.

Taken together, the spectrum of our work will provide a path toward a stronger culture of health for our state, with nurses helping to lead the way.
Using Your Message

• Moving beyond nursing
• Highlighting the broader impact on your community and state
• Understanding what motivates your prospect
  – Health care providers
  – Other health-related businesses
  – Non-health-related businesses/major employers
  – Community foundations
  – Individuals
Using Your Message

• Asking for input or advice
  – What feedback does the prospect have for you on your case materials? (especially in early stages)

• Exploring fit and gauging potential
  – What resonates with the prospect and aligns with their areas of interest?

• Educating and intriguing
  – What information will lead the prospect to a greater level of engagement and interest?

• Making the ask
  – What specific commitment are you asking the prospect to make? (usually not the first meeting!)
Using Your Message

• Main objectives with prospects:
  – Confer trust
  – Convey passion
  – Create connection

• To accomplish that:
  – Know the case messaging in your own words
  – Practice your pitch
  – Determine who does what
Questions or Comments?

Press *1 on your telephone key pad to ask a question
(Please be sure to record your name after the prompt)
OR
Use the “chat” feature to send “everyone” a question.

If you are having trouble asking a question, please click the “Raise Hand” button on the bottom right of your screen

You can find the recording, webinar summary, and additional resources by going to: www.campaignforaction.org/webinars.
Upcoming Webinars

Research Managers Webinar #4: Workforce Planning
May 23, 2016
3-4 PM

STEM Programs to Grow a Diverse Nursing Workforce
June 30, 2016
3-4 PM