Resuscitating your Prospect Pipeline

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&

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Today’s Case - Agenda

- “Patient” History & Diagnosis
- Resuscitation Techniques
- Recovery Phase
- Establishing an Ongoing Healthy “Lifestyle”
- Resuscitating your own Pipeline
- Q&A
Understanding the Patient’s History & Making the Diagnosis
The “Patient”

- Women’s College Hospital (WCH) is Canada’s first and only stand-alone academic ambulatory care hospital with a focus on women’s health research.

- Women’s College Hospital Foundation was officially established in 2006 after the Hospital’s demerger from Sunnybrook.

- WCHF launched a $70-million capital campaign in 2008 in support of a new, state-of-the-art ambulatory care hospital facility.
The Symptoms

• “Unhealthy” database:
  – Poor documentation (e.g. incomplete records, prospects with old ratings/information and no rationale or research behind them)
The Symptoms

• “Weak” prospect pipeline:
  – Unqualified suspects (with no history or rationale)
  – Many prospect “lists,” but not a rigorous or disciplined prospect management system
  – Prospect review meetings were tired …always looking at the same suspects; new names were rarely brought forward
  – “Low hanging fruit” had all been harvested or declined
Diagnosis: Flat lined!

Look familiar?
The Resuscitation Plan
CPR: Strategic Plan

- Identify Project Members
- Allocate budget
- Implement Prospect Management
- Purge & Prioritize
- Identify New Prospects
- Prospect Review & Uptake
- Strategic Pipeline Plan
## Medical Team

<table>
<thead>
<tr>
<th>Member</th>
<th>Role</th>
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<tbody>
<tr>
<td>WCHF Foundation Researcher</td>
<td>Project Manager</td>
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<tr>
<td>KCI Research &amp; Analytics</td>
<td>Targeted Screening</td>
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<tr>
<td></td>
<td>Prospect Review / Qualification</td>
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<td></td>
<td>Prospect Identification</td>
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<tr>
<td>WCHF Campaign Director/VP Development</td>
<td>Strategic (Organizational) Focus</td>
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<tr>
<td>KCI Sr. Vice-President</td>
<td>Strategic Fundraising Counsel</td>
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 Allocating Resources

- The WCHF Research Budget was paying for a number of annual fee-based services (i.e. online databases, news resources, etc.)
  - Although useful, they reflected and reinforced the tendency to do exhaustive and reactive research rather than proactive strategic research
- WCHF Researcher decided to streamline services and allocate money towards a single high-impact project
Patient Management

• Both Prospect Rating and Clearance (assignment) needed to be renewed; the following process was planned:

Research
- Preliminary research on potential prospects
- Ensure relevant & historical information stored in database

Coding
- Prospects classified based on capacity and inclination
- Goal of keeping ‘top prospect’ list to manageable size with a ready reserve of new names

Assignment
- Ensure top prospects are assigned and activity tracked
Prospect Identification

- A “transfusion” of new potential supporters was needed
- Existing volunteers were “tapped out”
- Identification plan focused on:
  - Similar donor lists
  - Known philanthropists
  - High-profile people with a potential connection
  - Screening of mid-level donors and/or those in high-value neighbourhoods

- KCI’s role would be screening, identification and qualification
  - Foundation researcher focused on strategy and project management
Presenting the Prospects

- Success hinged on presenting information in a way that:
  - Encourages engagement
  - Allows fundraisers to provide feedback to research and augment the information presented
  - Fosters decision-making and commitment to a next step for each potential prospect
Team Consult

- Three sessions planned as key delivery milestones; attended by all project team members
  - KCI Research would present their findings on potential prospects and a snapshot of key data
  - WCHF Research and Development team would consider, ask questions, and supply additional information based on their knowledge where applicable
  - KCI Strategic Counsel’s role was to provide input into possible considerations and approaches, as well as any additional background information

- Goal was to ensure timely decision-making and commitment to action (or removal) for each prospect
Recovery & Rehab
– Implementing the Plan
Pre-Op: Prospect Review

• The Foundation began a project to review, rate and code existing prospects
  – Goal was to build a culture and vocabulary with discipline and rigor around prospects
• Developed a set of Proposal Management Guidelines & Pipeline Management Guidelines
• Focused first on removing prospects who were “stale” and had low chance of success
• Eventually worked down to a “top 100” list
Assessment: Prospect Rating

• Prospects were rated, prioritized and assigned to appropriate staff
  – based on link, interest, affiliation (LIA) = hot, warm, cold

• For prospects without recent activity or first-hand knowledge, Foundation created a screening formula:
  – Estimated real estate value based on home address
  – Employment (where known)
  – Previous giving to the Foundation
  • Result = approximate estimate of used to prioritize prospects for review
Medical Imaging: Screening & Review

• This process identified matches between the Foundation and KCI’s prospect databases

• Some of these names were already known to the Foundation team, but additional information provided helped to provide insight (a “fresh look”)

• Others were “hidden gems!”
Surgery: Prospect ID

- Research staff went to work!
- Prospects were rated and prioritized
- Strategic, tandem activity was key:
  - Brought in a farther reach by using KCI resources
  - Brought in the perspective from working with other charities
  - Ensured “no stone unturned” for sourcing or info gathering
Post-Op: Team De-Brief

- Increased communication – opened up channels between Foundation research and development team
- Accountability – immediate integration of new or newly qualified major gift prospects directly into the pipeline
- Team energy and enthusiasm …oh and a little chocolate always helps!
Maintaining a Healthy Lifestyle
Healthy Database & Thriving MG Pipeline

- Rigour: Proposal Management Guidelines (our livelihood!)
  - Data entry (24-hour turnaround policy), consistent data entry format, definitions (e.g. stages - a prospect’s status)
- Reports, reports, reports!
  - Focused reports e.g. age and stage, deferred, gap analysis, campaign dashboard
- Accountability (and pride!)
  - Constantly tracking activity
  - One team member assigned as the “data doctor” (she keeps us all in check!)
Going Forward

Focus on wellness and prevention!

- Maintaining data integrity (customer/donor service first)
- Fosters collaboration among entire Foundation team
- Communication is key (eliminate silos between internal teams, accountability and ownership for all)
Resuscitating Your Own Pipeline - Where to Begin?
Lead the Process

• You, as the prospect researcher, are ideally positioned to lead a pipeline revitalization project

• Consider yourself the “Treatment Leader” (e.g. physician who directs the medical treatment, assesses the patient and determines patient triage decisions)
Make the Diagnosis

Assess the nature and severity of the problem

Symptom Guide:

- Lacking information? Check Prospect Management process.
- Not enough prospects? Try a new Prospect ID approach or consider mining your database.
- New prospects not being assigned or cultivated? Consider if purging of old prospects is needed; will a new process help change the culture?
- Same old prospects getting all the attention? Consider coding with fresh eyes, or getting external perspective.
Your Rx Checklist

- Triage
  - Identify your top priority
- Assign the bed and medical team
  - Align your resources with your critical needs
  - Be sure all interested parties are involved or represented
- Design a treatment plan
  - Keep it simple, but outline what you’re going to do to maintain focus
- Consider a second opinion
  - Internal or external, involving others ensures accountability and action.
  - Build in checkpoints to keep on pace
- Take the medicine!
  - Follow the plan and be disciplined
- Allow time for rehab!
  - Culture shift takes time and sustained effort
- Maintain your healthy lifestyle
  - Be the champion of good habits!
Questions?