

# Integrating Philanthropy for Greater Success

NAD Planned Giving  
Indianapolis, IN  
August 6, 2019



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HEALTH

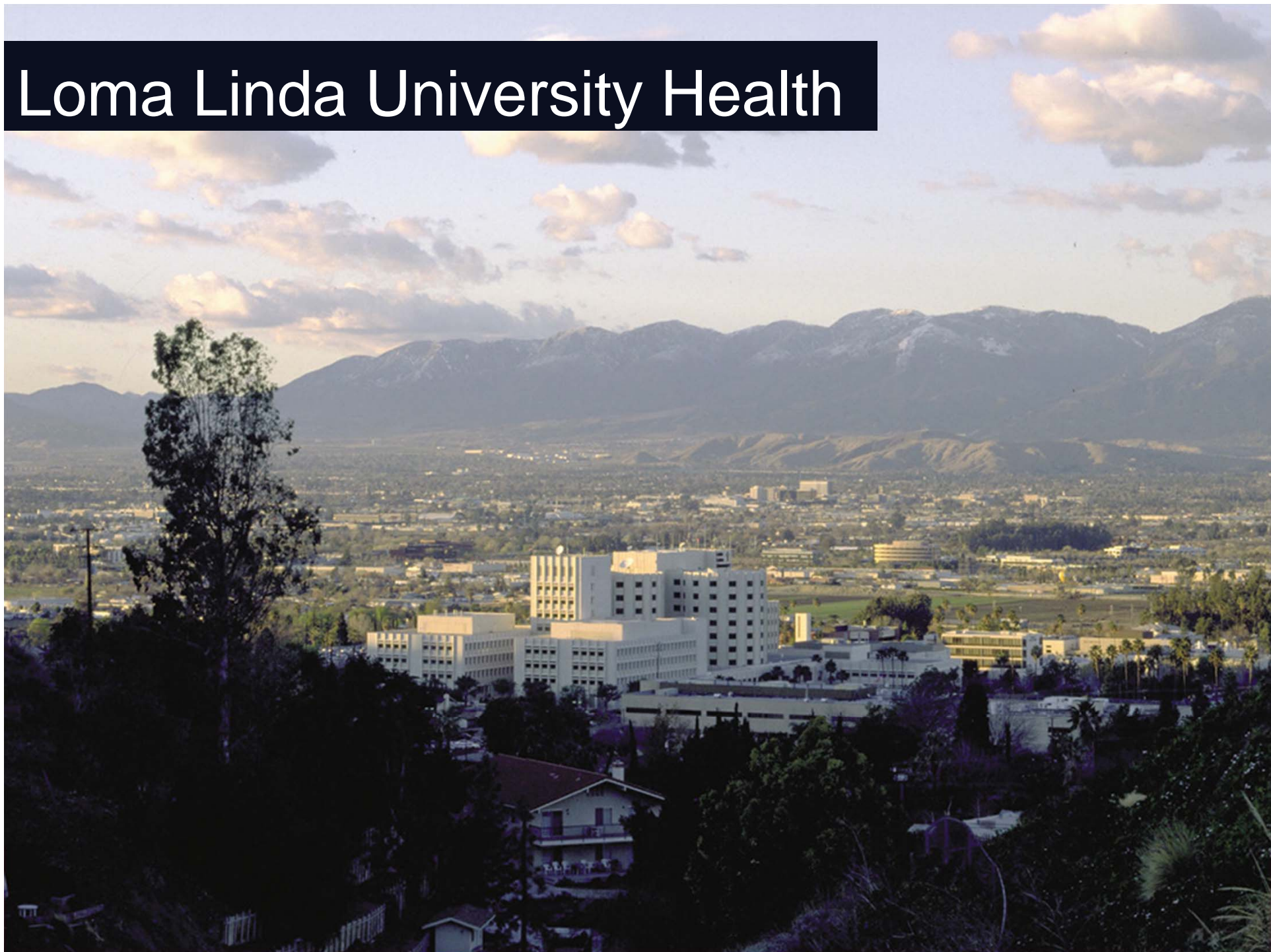


# Loma Linda University





# Loma Linda University Health



# Overview of LLUH



**Founded in 1905**



**8 Professional health focused schools**



**4,451 students**



**6 hospitals regionally**



**Serving over 1.5 million patients each year regionally**



**1,000+ physicians in 67 specialties and subspecialties**



**700+ residents in 39 programs and 20 fellowships**



**Innovation examples: infant heart transplantation, proton therapy, dentistry, mental health**



**Focus on health, wholeness and disease prevention**



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# The University



School of Dentistry



School of Medicine



School of Nursing



School of Pharmacy



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School of Allied  
Health Professions

School of  
Behavioral Health



School of Public  
Health

School of Religion



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# No. 1 in National Survey on Job Meaning







# The Medical Center

» Six hospitals in inland Southern California



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# The Medical Center

- Level 1 regional trauma center for four counties with a population over 4.4 million





# The Medical Center

Firsts and Leaders

## Proton Treatment Center

- First hospital-based proton treatment center
- Over 19,000 patients treated (more than any other center in the world)





# The Medical Center

Firsts and Leaders



**Infant Heart Transplant**  
Pioneer in the field of infant heart transplant

# The Medical Center

»Dr. Bailey and some of his transplant babies



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# The Medical Center

Firsts and Leaders



## Facial Tissue Transplant

Largest evulsion injury successfully reattached in a child



# The Medical Center

Firsts and Leaders



Healthy Lifestyle Research



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# The Outside Perspective

- » Spiritual values keep the organization financially frugal
- » Philanthropy: \$15 million annually

# The Bombshell

» Raise \$366 million in private philanthropy



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# Sudden Urgency



- » Blessings of a Mega gift
- » Leverage state bond money for Children's Hospital
- » Bold and inclusive vision that is truly transformational

# THIS REQUIRED SEVERAL THINGS

- Inspire others beyond usual donors
- Case to inspire the community
- Show the vision with their engagement
- Leadership support!
- Train leadership on culture
- Train advancement team (break down silos)
- Challenge traditional thinking and processes





CHANGE

CHANGE

CHANGE

CHANGE



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# VISION 2020

The Campaign for a  
Whole Tomorrow



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**\$366M**



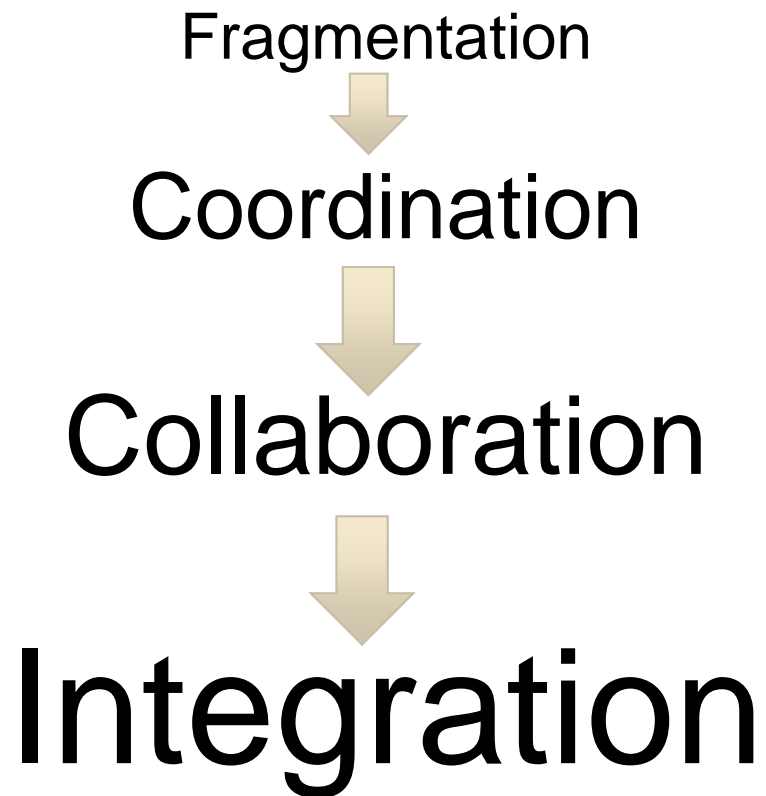
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# Building a Culture of Philanthropy

- Educated administrators, clinical and university leadership about role in philanthropy and a campaign
- Launched comprehensive employee giving program
- Launched leadership giving program
- Established campaign leadership committee







# What was Required?

- Right team (willing to step outside the norm)
- Trust (from LLUH and the team to try something new)
- Empowerment (setting the vision and supporting the process)
- Risk (unproven promises)



“Why was it important to integrate with the rest of philanthropy?”

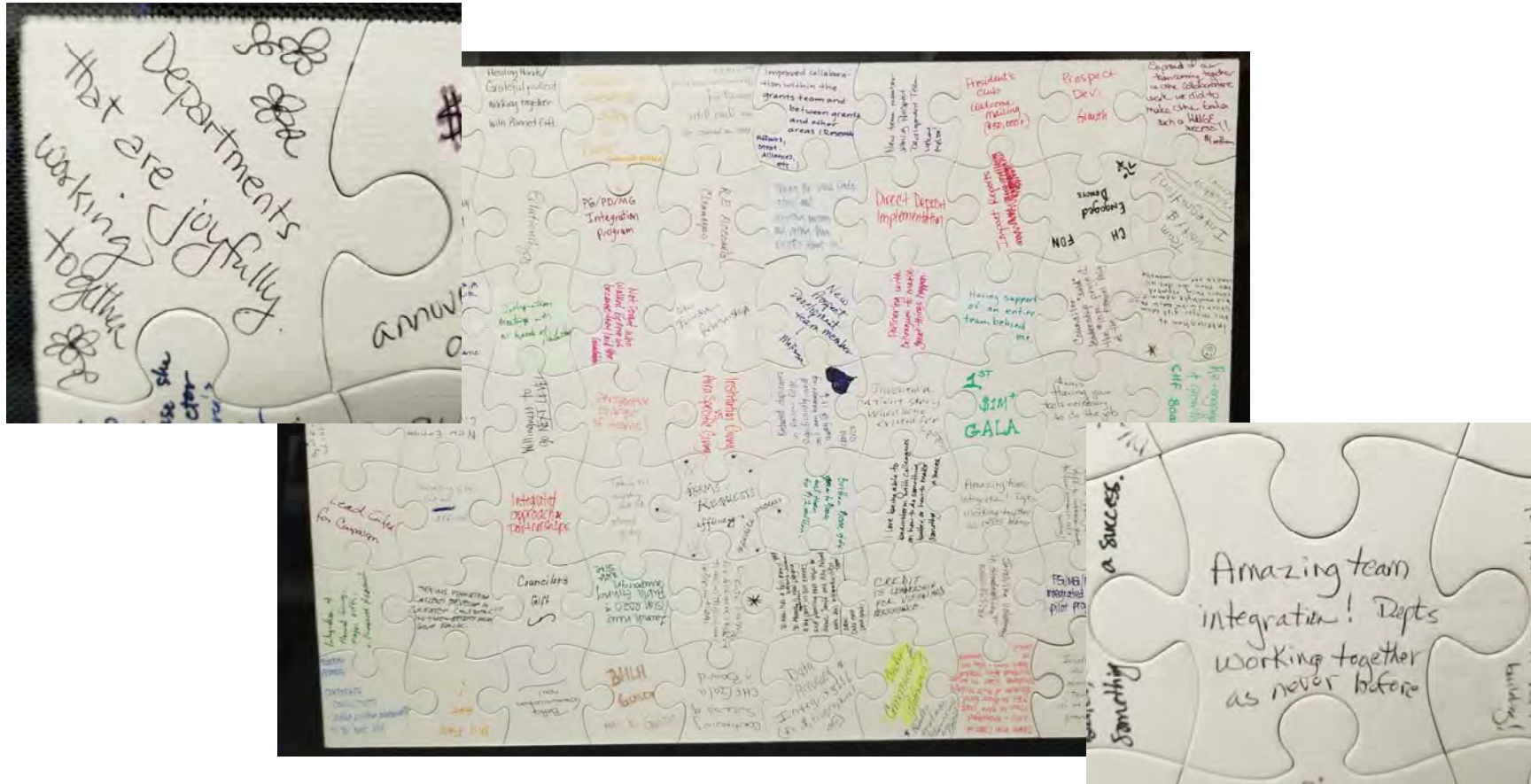


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# INTEGRATION:

## Reaching a common goal through interdependence



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“What specific actions were required to integrate?”



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A change in mindset and process

We used to be reactive –  
people would come to us

Now, we go to them proactively

\*People are first - versus process\*



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# MarComm Partners

- » Messaging was seen as mutually important
- » Outcomes and best practices applied thus metrics began to help drive consumer action
- » Stories were told through philanthropic lens and consumer friendly
- » Messaging integrated across the system communications versus one department
- » Online, social media and web strongly driven experts in those areas now with a lens for philanthropy – different look, feel and outcomes



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# The Roadmap

- Transparency in metrics
- Transparency in reporting
- Make portfolios strategic (PD/PG program)
- Training teams and ensure they have resources
- Be clear on priorities
- Open and clear communication (even when it changes)
- Listen and adjust as needed



# Portfolios

- **Right sized to focus on**
- Qualification
- Cultivation
- Solicitation



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# Meaningful Metrics and Accountability

1. Drove metrics from measuring *moves* and *visits*
  - **Qualifications**
  - **Intent to Solicits**
  - **Solicitations**
  - **Closed gifts**
2. Transparent reporting system sharing individual and entity goals
3. Managing up and down
  - Modeling activity and expectations from senior leadership





# Metrics and Peers

Institution	Portfolio Size	Solicitation %	Annual Solicitations	Monthly Qualifications
CAMH Fdn	120-150	25-50%	24-36	10
NC State	120-150	12-25%	18-24	8
Univ. of Tenn	150	27%	40	8
Mayo Clinic	150+	30%	24-30	5-8 wk
Fox Chase Cancer Center	200	13%	25	10 wk
LLUH	150	30%	24	5.5

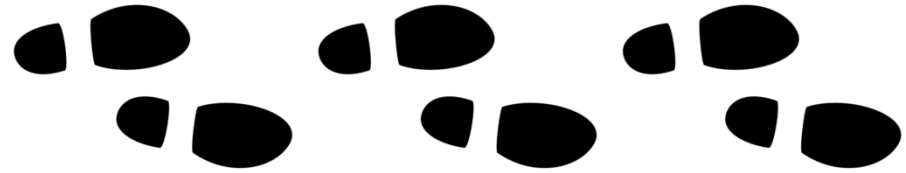


# Core Changes

- » Culture that builds philanthropy
- » Get of the office and talk with people in their offices, homes, etc.
- » Not reactive, but proactive!



# 3 Steps



1. De-mystified planned giving through informal training program.
2. Empowered front line fundraisers to guide planned giving conversations with their donors.
3. Maintained visibility through “What’s Your Plan?” marketing campaign.





*We wanted to give something back to the School of Dentistry. By donating a piece of property, we benefited from immediate tax savings while having the satisfaction of knowing our gift would make a difference in the lives of students.*

— Clyde (SD '70) and Kirsty Roggenkamp  
Professor at LLUSD

What's  
**Your**  
Plan?



## For the Future of our Students We **LIVE** to Give



We prepare students to care for the whole person — body, mind and spirit. You can play an important role in impacting Loma Linda University Health by establishing a legacy gift to benefit Vision 2020 — The Campaign for a Whole Tomorrow.

To learn more about estate gifts or other ways to give, contact the **office of planned giving**.

**Office of Planned Giving**  
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Loma Linda, CA 92354  
909-558-4553 | [legacy@llu.edu](mailto:legacy@llu.edu)  
[llulegacy.org](http://llulegacy.org)

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# Building a Comprehensive Pipeline



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# Before Comprehensive (BC) Pipeline

1. Each team managed their own pipeline
2. Philanthropy results were also reported by team
3. Results
  - Lack of consistency across pipelines
  - Cumbersome and not a great decision making or tracking tool
  - Created a silo effect
  - Promoted distrust (and competition) among teams
  - **We were not maximizing our best relationships**





# Comprehensive Pipeline

**What matters most is maximizing relationships. The best way that can be accomplished is as a team.**

1. Eliminated reporting pipelines and results by function/department
2. Created a single pipeline
3. Developed consistent reporting (and monthly pipeline meetings)
4. Introduced shared or team credit

**Results** = eliminated silos + leveraged diverse skills to maximize relationships



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“What were the outcomes?”



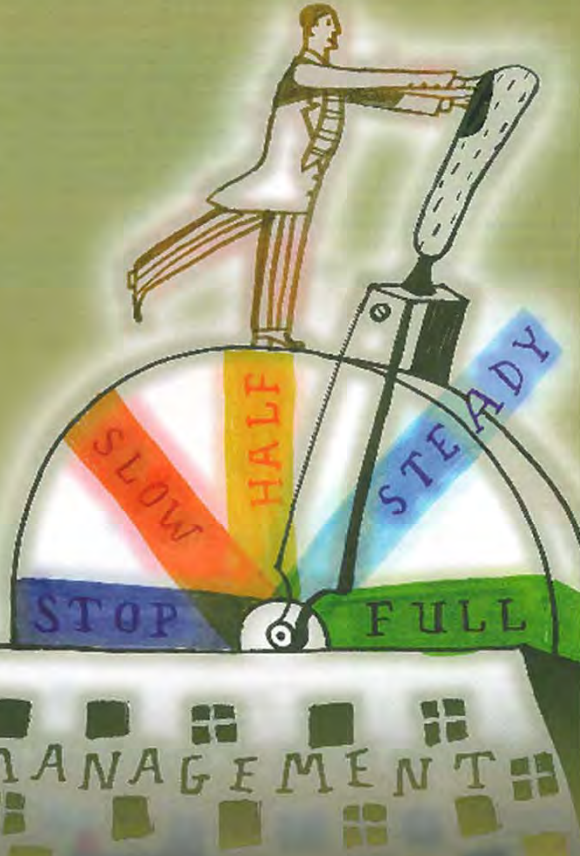
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# Professional Articles Following Outcomes

## THE CORNER OFFICE—

## FULL SPEED AHEAD

**How development directors are taking a leadership role through vision, resilience and commitment to mission**



Soon after accepting the position as the university's first senior vice president of advancement, veteran fundraiser Rachelle B. Bussell, CFRE, discovered that not only did the 14 individual advancement teams not communicate with one another, but many had never even met. "Each person had his or her own focus," Bussell recalls. "I had to find a way to get them to back up and see all their strengths working together." Her pitch? Give her a year to prove that they could make more of an impact collectively than individually while respecting the identity of each school or hospital.

Through patience and persuasion, Bussell and her team efforts eventually won them over. "Some were on board right away, some tested the waters and some stood back," she says. Critical to her success was the support of Dr. Hart, who named her to the university's executive leadership team. Fundraisers likewise responded positively to the flattening of the reporting structure and Bussell's encouragement to take risks. Eighteen months later, Bussell says, the university is seeing a "tremendous" increase in both the number and amounts of gifts. In 2014, in fact, more than 70 percent of major gifts were the result of the new, coordinated approach. During the same time, the team rebranded the institution as one coordinated body driven by a single mission.

"It's been an incredibly exciting time," Bussell says with a mixture of pride and relief. "I'm even more excited by the opportunities that lie ahead."

underutilized in organizations that have complex hierar

tures. "On the other hand," Cornelius says, "development officers are in a leadership and not just to manage

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And how do we

a long-range vision  
pose an organization's  
at mail is declining. Rather  
ing the last drops of revenue  
ary development director would  
duce his or her organization's  
et mail and simultaneously bring  
streams online. Nevertheless, CEOs  
mbers often balk at any argument in  
adoning tried-and-true techniques. In such  
the development director must make the case  
g the risk, including acknowledging that the new  
ach may fail. And, as a rule, failure tends to be a lot  
are common than success.

One way to overcome resistance is to get people used to focusing not on success but on learning from failure, Bunk explains. Development leaders exhibit resilience, bouncing back from their failures, by learning what went wrong and what to do better the next time. And, by their example, they encourage others to take smart risks, too.

Article from *Advancing Philanthropy*



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# Professional Following:

**GOOD GOVERNANCE CASE STUDY**  
*An Online Series by The Governance Institute*

## **Loma Linda University Health Reaches Out to Share Its Vision**

*By Elaine Zablocki, Staff Writer, The Governance Institute*



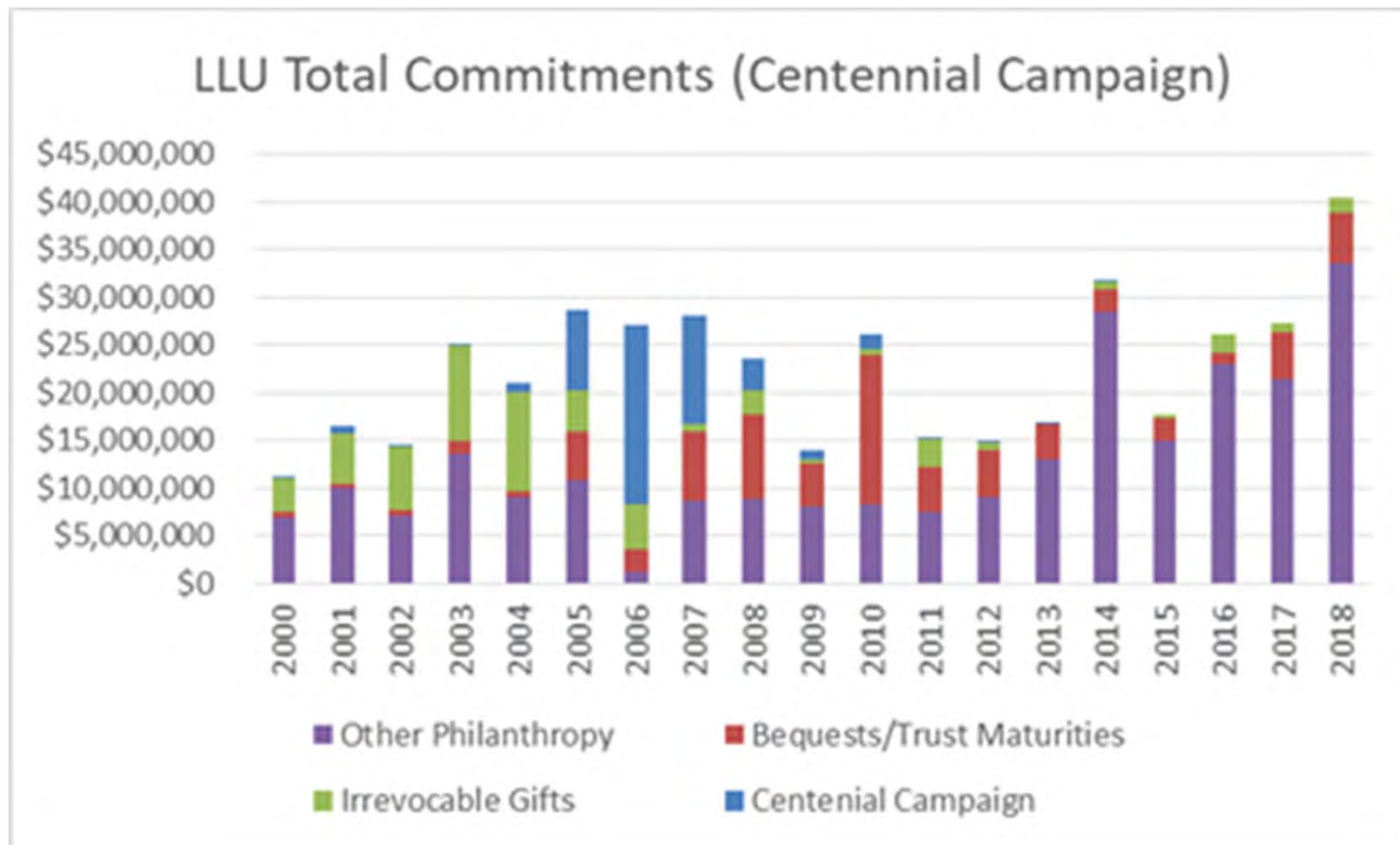
  
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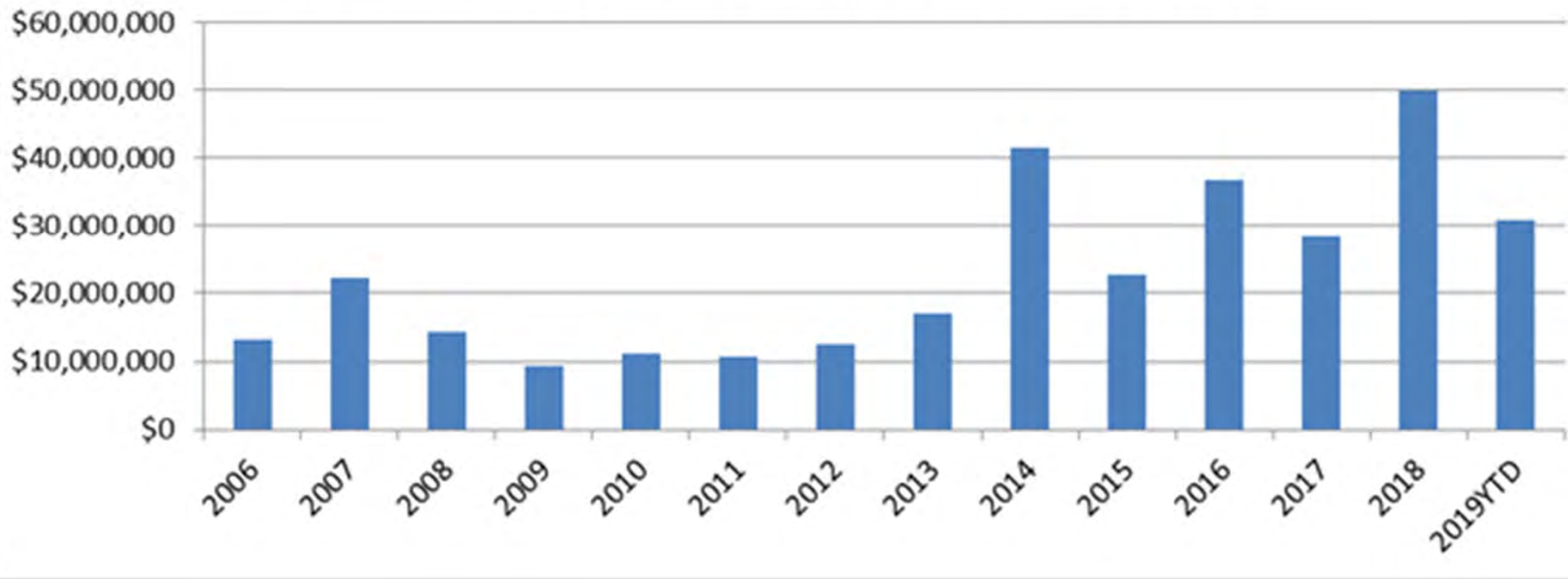


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# Trends over time



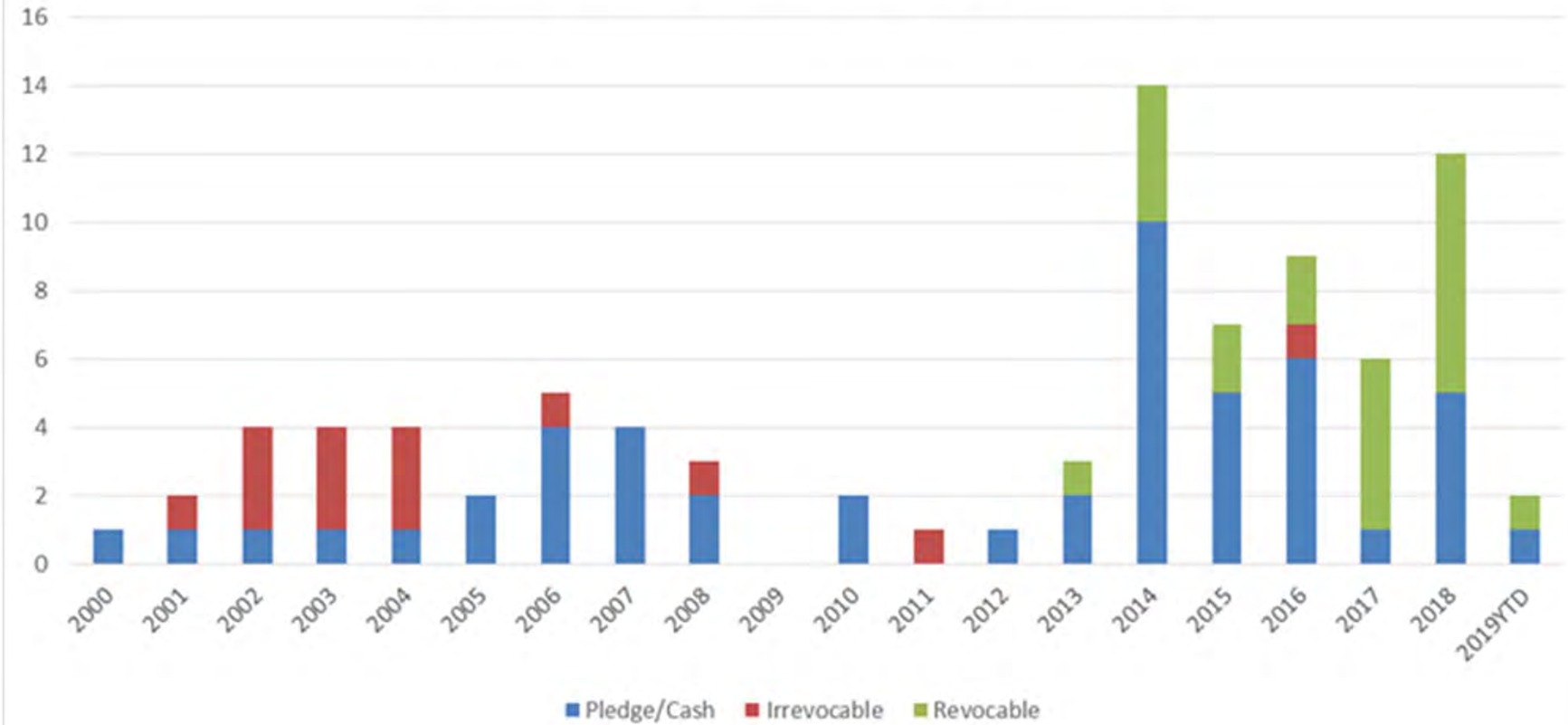
## Total Gifts from Managed Relationships



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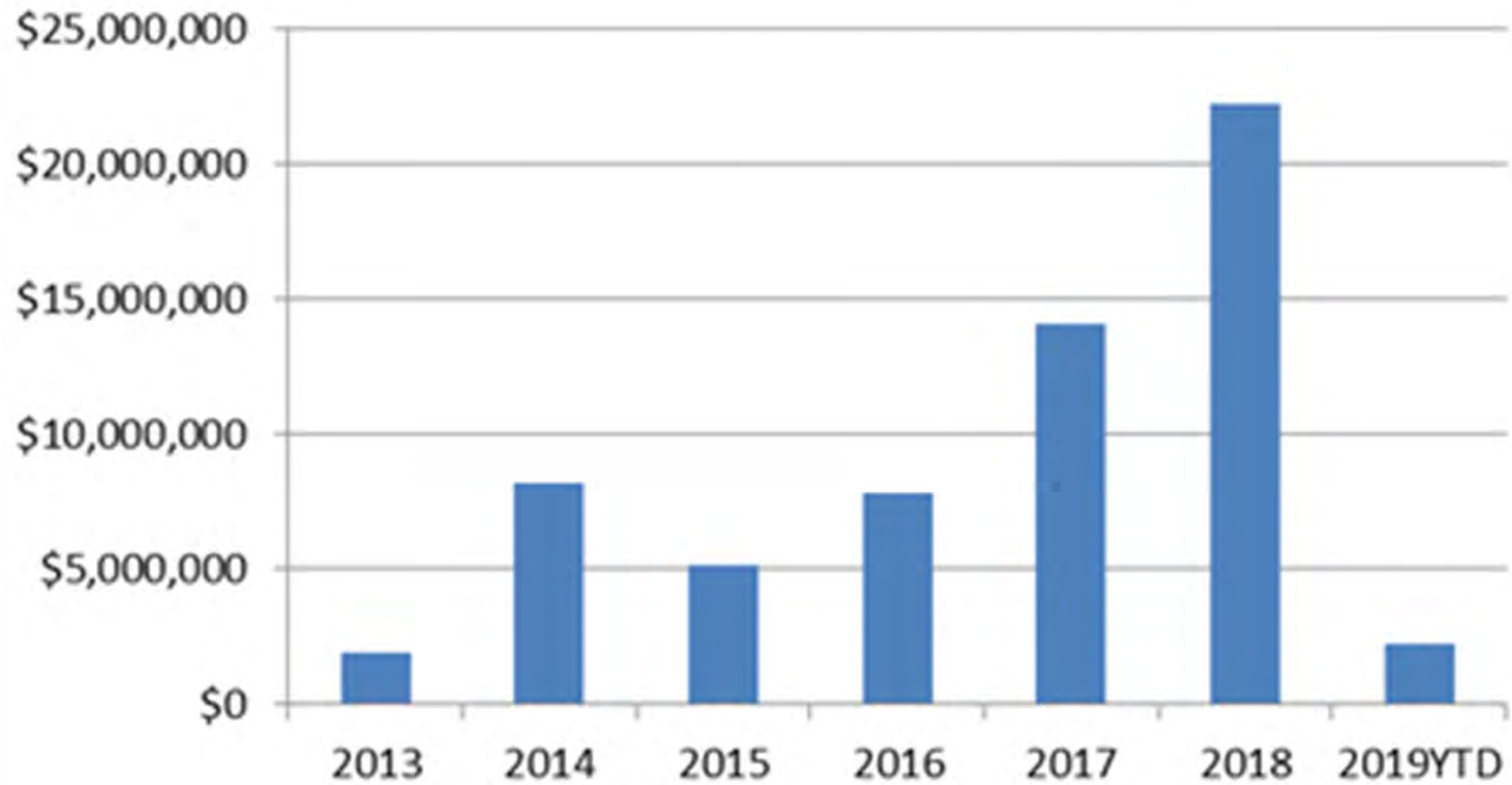


**Total \$1M+ Gift Number by Year**  
 Pledges & Cash Gifts/Irrevocable Gifts/Revocable Pledges



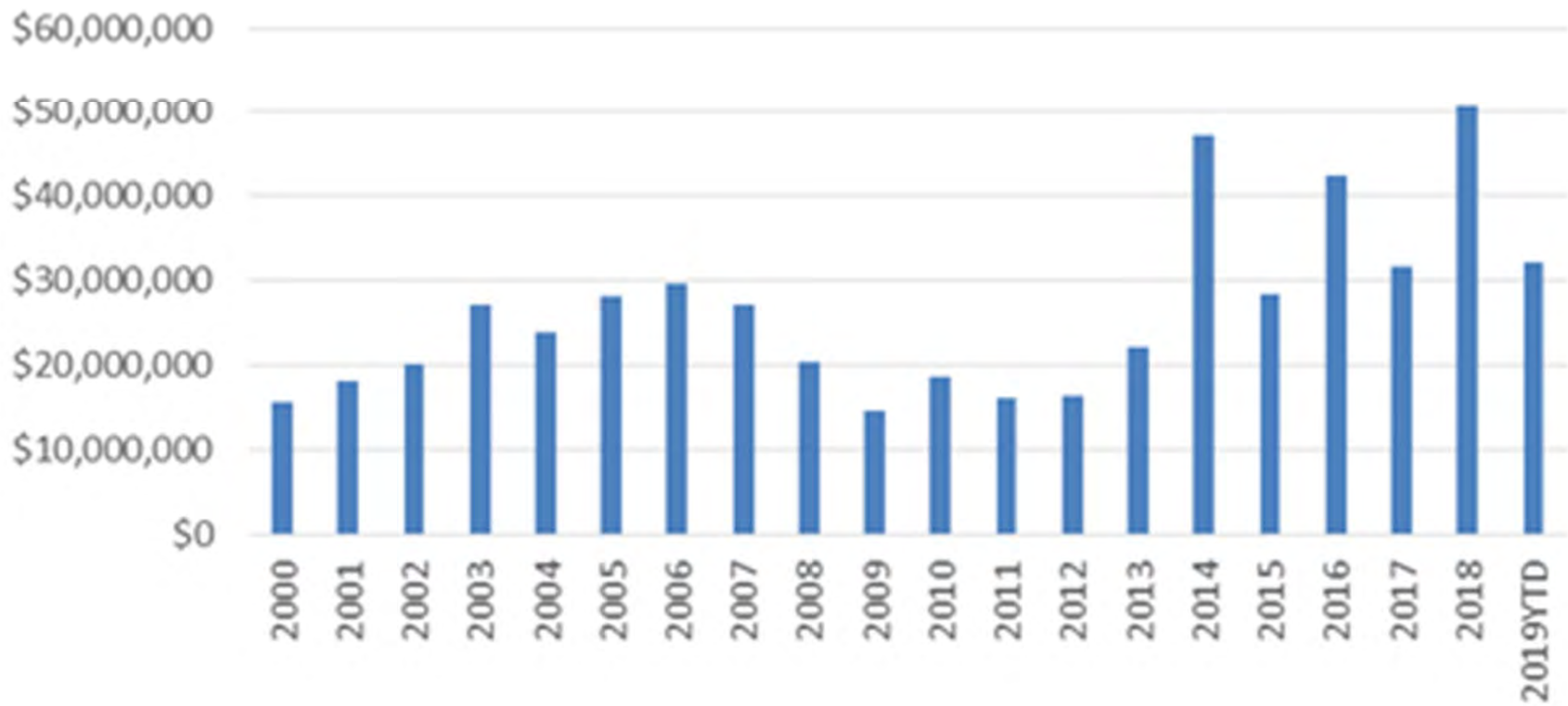
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## Total Planned Gifts - Revocable



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## LLUH Total Commitment minus Bequests/Trust Maturities



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# Increase in # and \$ of Average Planned Gifts Per Year



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# Philanthropy Relationship with Trust Services – A “Team”

- »Went from transactional to partnership in relationships
- »Trips and visits together to expand our opportunity to serve those who are investing in us
- »Understanding each others’ needs we combined to be stronger together
- »Collaborative and supportive relationships = better operations



“What recommendations would you have for philanthropy teams who are beginning the integration process?”



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# Vision 2020

**Philanthropic Goal: \$360 Million**  
**Addition of Indio: \$6 Million**  
**Total: \$366 Million**

**Campaign Gifts and Commitments  
Received through June 30, 2019:**

## Year To Date:

- \$36,221,502 - Vision 2020 priorities
- \$ 3,693,329 - Other projects
  
- **\$39,914,831** - Total Philanthropy



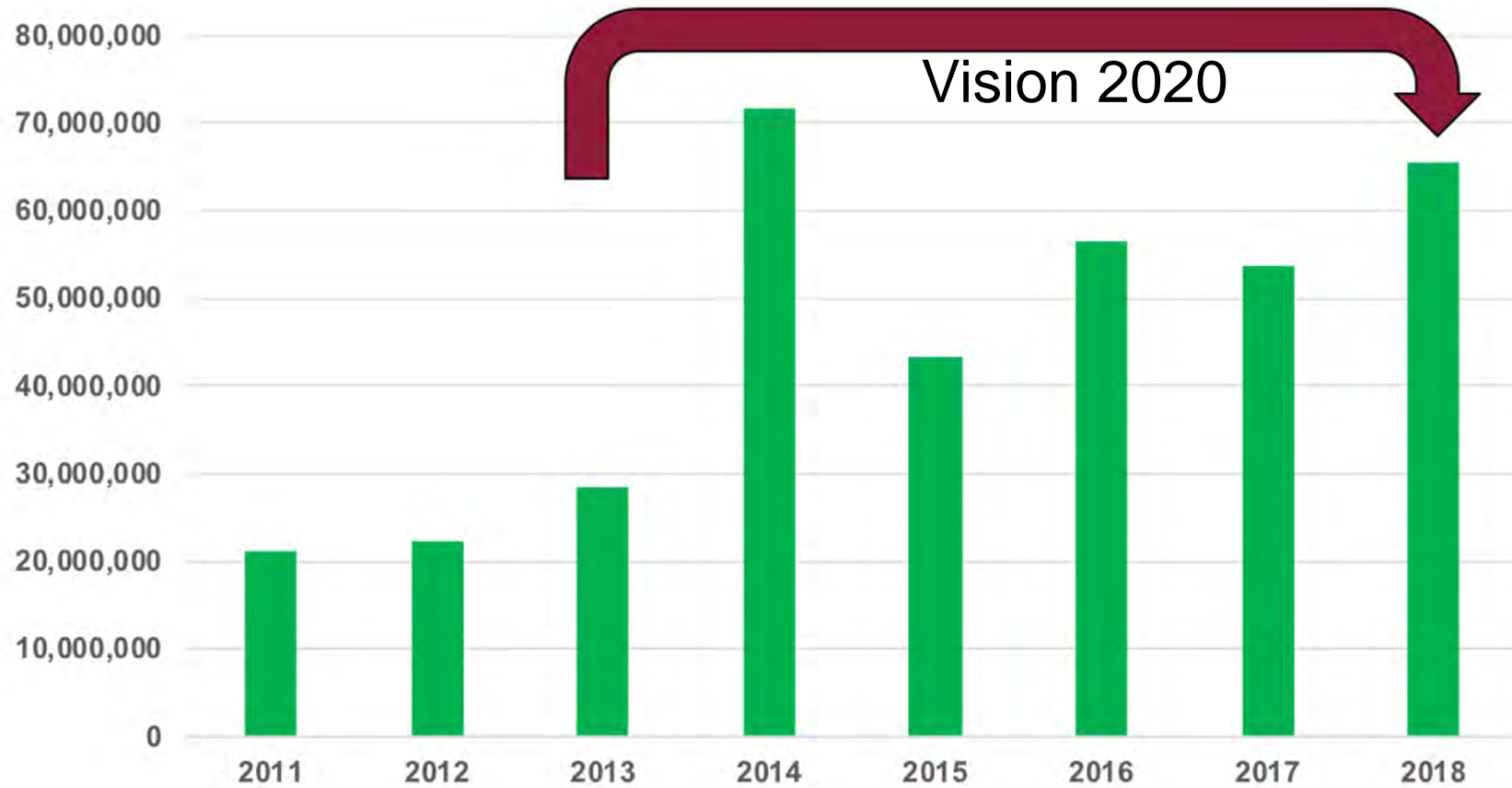
## Campaign To Date:

- \$355.48 million - Vision 2020 priorities
- \$ 49.00 million - Other projects
  
- **\$404.48 million** - Total Philanthropy

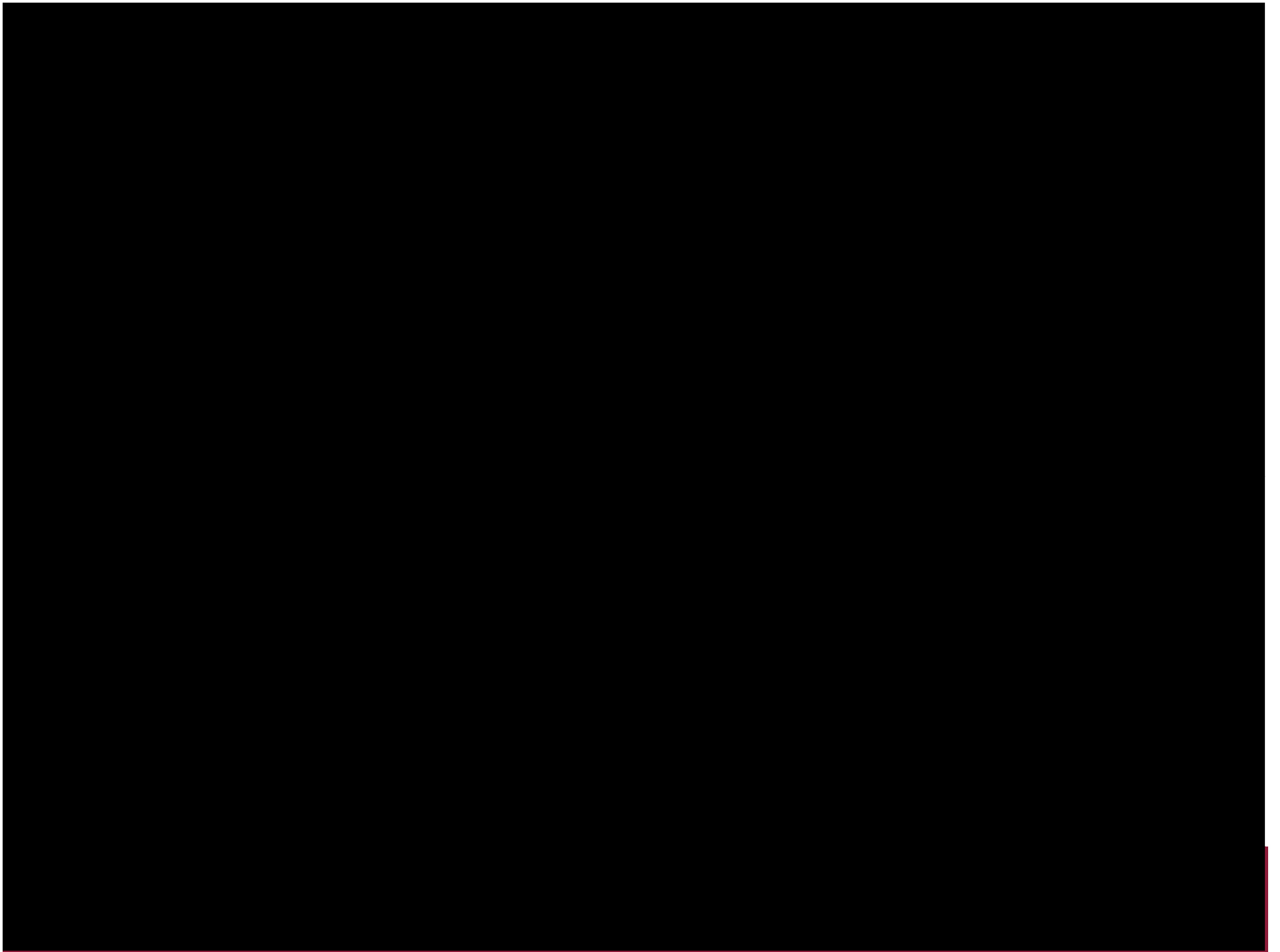


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# Philanthropy Trends









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Questions?

Panel up Next



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# Panel Members

- **Todd Mekelburg, Director of Planned Giving**
  - Planned Gift Development
  - Portfolio Management
- **Kenny Iwakoshi, Director of Trust Administration**
  - Trust Development
  - Trust Management
- **Ron Blaum, Planned Giving Officer**
  - Planned Gift Development
  - Front Line Fundraiser Interaction

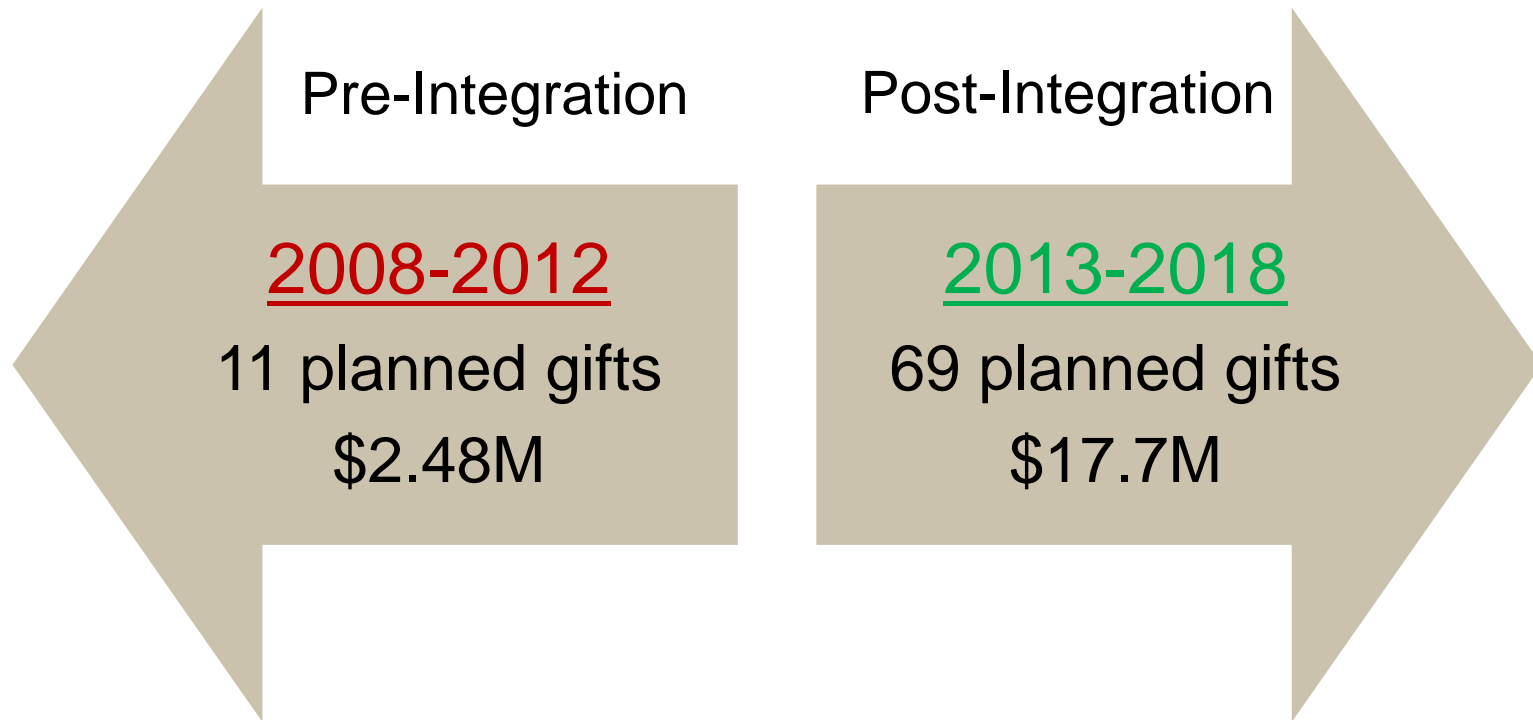


“What outcomes did you observe as a result of the integration efforts?”



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# Increase in # and \$ of Average Planned Gifts Per Year



# Integration Outcomes

- » Improved teamwork
- » Front line fundraiser confidence has greatly increased
  - ~ Planned giving discussions



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# Integration Outcomes

- » Increased philanthropy and entity interest in planned giving
- » Earlier integration of Trust Administration involvement
- » Continued involvement of front line fundraiser and planned giving officer after the gift



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# Integration Outcomes

- » More openness about involving other staff in the planned giving conversation with donors
- » Respect between front line fundraisers grew as we learned from each other and observed the merits of collaboration
- » Greater openness and understanding between planned giving and trust administration as we engage new donors and steward current donors
- » Knowledge of planned giving techniques increased among the front line fundraisers



“What challenges did you experience?”



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# Challenges

- » Confidentiality and fiduciary concerns
- » Real estate gifts
- » Curiosity regarding donor's past gifts



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# Challenges

- » Learning the culture and complexity of Loma Linda
- » Gaining the confidence of the front line fundraisers
- » Concerns about running out of qualified prospects



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# Challenges

- » Flow of information
- » Awareness of process



“What specific steps did you take to increase the visibility of planned giving and trust administration?”



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# Specific Steps

- » Being more deliberate in reaching out to major gift staff and gradually becoming more involved in discussions with front line fundraisers and trust administration staff.
  - ~ Patient engagement services
- » Connecting with the prospect development team to discuss new prospects
- » Planning travel with front line fundraisers
- » Introducing a trust officer to potential donors early in the conversation



# Specific Steps

- » Demystified planned giving
- » Empowered front line fundraisers to begin planned giving conversations
  - ~ Regular portfolio management meetings
- » Created a consistent marketing brand for planned giving



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[lulegacy.org](http://lulegacy.org)

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# Specific Steps

- » Participated in educational opportunities for front line fundraisers
- » Provided real time access to philanthropy staff for questions
- » Created reports for executive leadership and board of trustees to show results



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“What steps have you taken to steward your planned giving donors?”



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# Stewardship Steps

- » Assignment of relationship manager
  - ~ Connection to program of interest
  
- » Involved stewardship team
  - ~ Annual donor event



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# Stewardship Steps

- » More revocable gifts have resulted in greater stewardship efforts
- » Still trying to work out the details
  - ~ Not enough staff to complete personal visits
- » Decades of stewardship



# Stewardship Steps

- » Donors are offered the opportunity to share their story
  
- » Donor is moved into a stewardship classification and managed
  - ~ Information
  - ~ Events
  
- » Recognize special events in the donor's life





“What recommendations would you have for organizations wanting to implement an integration process?”



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# Recommendations

- » Within your entity

- ~ Integration allows you to access more donors

- » Outside your entity

- ~ Work with other entities to give your donors one place to complete their planned giving needs

- Union, WAF



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# Recommendations

- » Focus on your mission
- » Look for ways to work together
- » Apply a donor centered approach
- » Give credit to all team members
- » Utilize the natural connection between staff and donors
- » Adapt strategies to fit the donor



# Recommendations

- » Make planned giving accessible and understandable to your colleagues
- » Show the value of planned giving
- » Be patient
- » Look for opportunities to partner



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Thank You

Questions?



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