

Precision Development

Mirroring the Precision Medicine Model in the Fundraising Space to Maximize Success

Presented by: Adrienne Rose and Carly Frank August 6, 2019

Introduction



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Learning Objective



- Utilize "precision development" techniques in each stage of the relationship cycle
- This approach creates a meaningful and personal experience for your donors
- Leads to deeper relationships, gift closure and repeat customers

Precision Medicine



An approach to patient care that allows doctors to select the most effective treatments based on the individual characteristics of each patient.

Precision Veterinary Medicine?





Rita O'Neill is

looking for recommendations.

Hey Folks? Any Yorkie owners here? I'm looking for a good Vet here that would be more knowledgeable about some of the breed-specific issues Yorkshire Terriers (and other toy breeds) often deal with. She's 9 yrs old, well

bred, AKC etc and hasn issues (when they try to of. Still... Some stuff just We saw a practice twice went back there recently last lab work showed. In fact, I've taken her bashe's acting kind of pun (She's presented with co





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Precision medicine: an opportunity for a paradigm shift in veterinary medicine

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Precision Medicine



- Diseases/conditions
- Genetic factors
- Gender
- Age
- Other risk factors
- Lifestyle

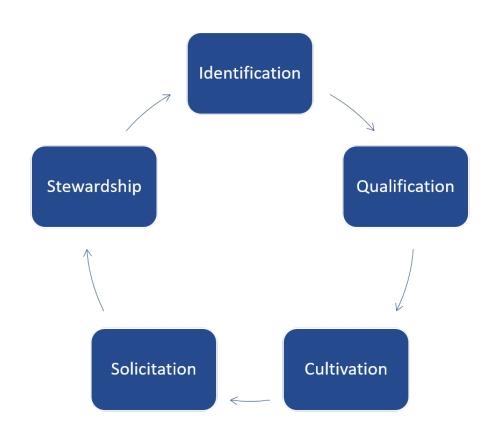
Precision Development



- Disease, gender, age, etc.
- Personality traits
- Interests, passions
- Location
- Giving patterns
- Timing

Relationship Cycle







IDENTIFICATION

Identification Tools



- Capacity
- Giving history
- Research
- Predictive modeling

Use Your Secret Weapon



FACULTY!



Identify Faculty



- Quality of partnership > Quantity of faculty
- Seek willing partners
- Consider wealth of patient population
- Ask leadership for help

Cultivate Faculty



- Understand what motivates them
- Show interest in their work
- Address ethical concerns
- Provide training
- Script them, draft correspondence on their behalf
- Build trust

Steward Faculty



- Celebrate successes
 - ➤ Gifts of all sizes
 - Philanthropy and not philanthropy-related
- Ask leadership to congratulate faculty
- Recognize faculty amongst their peers
 - > Faculty meetings



THE CARDIOLOGY BULLETIN

The latest news and updates from Hopkins Cardiology

Philanthropy Announcements

Corrie AFib



Congratulations to Hugh Calkins, MD and Seth Martin, MD who will receive a \$250,000 gift from to support the development of "Corrie AFib," a variation on the pre-existing Corrie smartphone app that will be geared towards helping AF patients.



Best Day Ever



"Adrienne, it's a lot easier being nice to donors than it is to write grants."

- Hugh Calkins, M.D.

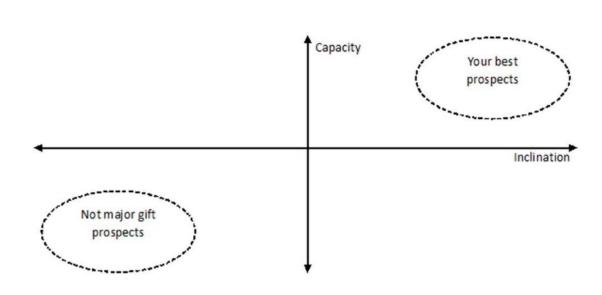


QUALIFICATION

Qualification Tools







A Simple Process



Your goal: take a large list, narrow it down

- Capability, not inclination (at this stage)
- Think logically, not emotionally
- Find your formula to narrow list
 - ➤ Age, how many visits, giving history, etc.



IDENTIFICATION AND QUALIFICATION

DISCUSSION



CULTIVATION

Cultivation



Bring the prospect closer to the mission

- Strategy
- Use of self
- Use of people and experiences



What Motivates the Donor?



Strategy: the "what" and the "why?"

- Relationship with faculty/staff
- Science
- Access
- Recognition

Who Motivates the Donor?



The use of self: the "who?"

- More times than not, it's not you!
- Find the right influencer

How and Where to Make the Move?



The use of people and experiences

- How do you want the donor to feel after the action?
- Listen for clues during cultivation activities to plan your next move

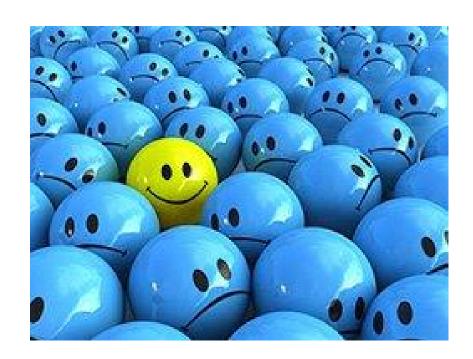


CULTIVATION

CASE STUDY

Case Study: "Mr. and Mrs. Disgruntled"





"Mr. and Mrs. Disgruntled"



- Longtime patients, annual donors, many failed attempts by development to cultivate
- Standard procedure not working
- Tailored cultivation experience by putting faculty and leadership at the forefront – development invisible
- Transformational estate gift



SOLICITATION

It's all In How You Package it JOHNS HOPKINS





Proposal



- Ask should not be a surprise
- Who should ask?
- Consider best delivery method
 - >Style of proposal technical or emotional tone?
 - ➤ Formal budget?
 - ➤ Face to face, phone, email, snail mail (in person is always preferred!)



SOLICITATION

CASE STUDY

Case Study: "Mr. Politician"





"Mr. Politician"



- Wealthy and busy, in-person meeting not possible
- Very grateful, strong connection with physician, not interested in high-touch development
- Conference call solicitation, faculty led, development made the ask
- Resulted in a 7-figure comittment



CULTIVATION AND SOLICITATION

DISCUSSION



STEWARDSHIP

The Best Part of Our Job!



- Your opportunity to give, not ask
- Show gratitude
- Keep them close to the mission
- Consider who the right steward is
- Be creative, personal

Live the Mission









Annual Publication



HODKINS PUSE NEWS FOR FRIENDS OF THE JOHNS HOPKINS HEART AND VASCULAR INSTITUTE

WHAT INSPIRES GIVING?

Giving from the Heart

Meet Richie and Kathy Amato

hen Richie Amato was 50, he and his wife, Kathy, asked Richie's physician about doing a baseline stress test just to check things out. The test revealed some issues that required follow-up. Richie, CEO of O.S.T. Trucking in Baltimore, decided to seek care at Johns Hopkins. After seeing cardiologist Roger Blumenthal, M.D., he was referred to cardiac surgeon William Baumgartner, M.D., who performed a double bypass operation in September 1994.

Now living in Crofton, Maryland, the Amatos say they developed close bonds with both physicians and have been loyal supporters of the Johns Hopkins Heart and Vascular Institute since 1995, donating in recent years directly through their individual retirement accounts. They spoke recently with Pulse.

Q: Can you tell us about your experience with the doctors and staff members at Johns Hopkins?

Kathy: We came to Johns Hopkins because we then there is reputation. We were very fortunate to be introduced to Roger Blumenthal, who we developed a great relationship with, and we were more than fortunate to have Dr. Baumgartner do Richie's surgery. Dr. Baumgartner was absolutely wonderful. He was a skilled doctor and so humble, with a wonderful bedside manner. He made us feel so comfortable.

Q: How did you become donors to Johns Hopkins? Richie: Roger Blumenthal at the time was involved with a yearly fundraiser called Heartfest. That's what actually started our giving. We went to the first Heartfest in 1995. From there, we graduated into donating every year.

Q: What has inspired you to continue giving, year after year?

Kathy: We have a great rapport with Dr. Blumenthal. He is Richie's cardiologist to this day. Through learning about the heart center, we realized the importance of research. We made a decision to put our charitable donations each year toward the Johns Hopkins Ciccarone Center for the Prevention of Heart Disease because of the great service we received, and continue to receive, at Johns Hopkins. Without heart research, a lot of folks, my husband probably included, wouldn't be here today.

Q: How do you feel that your gifts have made an impact?

Kathy: We feel that without contributions like ours, the research wouldn't happen. For example, it took a lot of research to develop the implantable defibrillators that have saved so many lives. Without research, there wouldn't be implantable defibrillators. (See related story on page 2.)

Q: What would you tell others considering a gift to the Heart and Vascular Institute?

Kathy: For the last several years, we have asked our family, in lieu of gifts, to give to the Ciccarone



Center. They have done so, because we believe so much in Johns Hopkins and the research and the care that they provide.

Richie: I would tell them that, one day, I think researchers at Johns Hopkins are going to cure cardiovascular disease.

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Case Study: "Mrs. Cinderella"





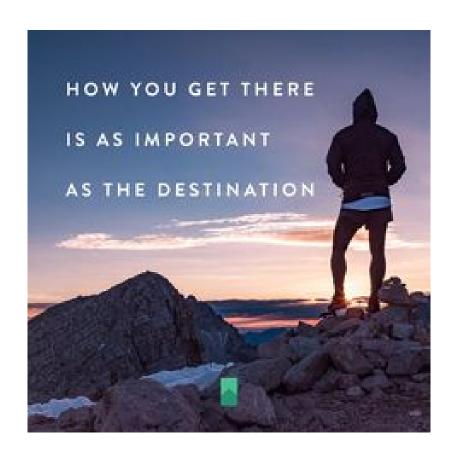
"Mrs. Cinderella"



- CGA donor to capital projects
- Recently widowed, finding her own philanthropic voice
- Passion for education led to first outright gift – an endowed fellowship
- Spending time with her fellow, meeting other residents made a genuine impact
- Stewardship lunch turned into another
 7-figure gift more to come!

Closing





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THANK YOU!



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