



# Building a Principal Gifts Program that Leverages Demographic Shifts and the New Economy



# Today's Speakers



Meghan  
Davison

SENIOR VICE PRESIDENT



Darrin  
Goldin, JD

ASSOCIATE VICE PRESIDENT,  
DEVELOPMENT & ALUMNI RELATIONS



Elizabeth  
Hormann

SENIOR VICE PRESIDENT



Talmadge  
Ingham-Johnsen

VICE PRESIDENT FOR  
DEVELOPMENT





Welcome! We want to get to know you!

**What type of health institution do you work for?**

**[live polling – join at [menti.com](https://www.menti.com) use code 7725 4924]**





While most healthcare philanthropy comes from grateful patients, engaging non-patient donors who are new to your community is an important pipeline building priority. This is particularly true for localities like Nashville and Dallas that have seen recent population growth resulting in an influx of potential supporters who are not yet patients.

**In this session we will explore building a principal gift program within the context of these trends:**

- Understanding the core features of highly successful principal gift programs
- Setting expectations on fundraising potential from non-patient donors
- Creating engagement strategies for non-patient donors
- Operationalizing this new potential



# Nashville & Dallas Landscapes

Both cities have unique characteristics impacting fundraising:

Among the fastest  
growing cities in the  
United States

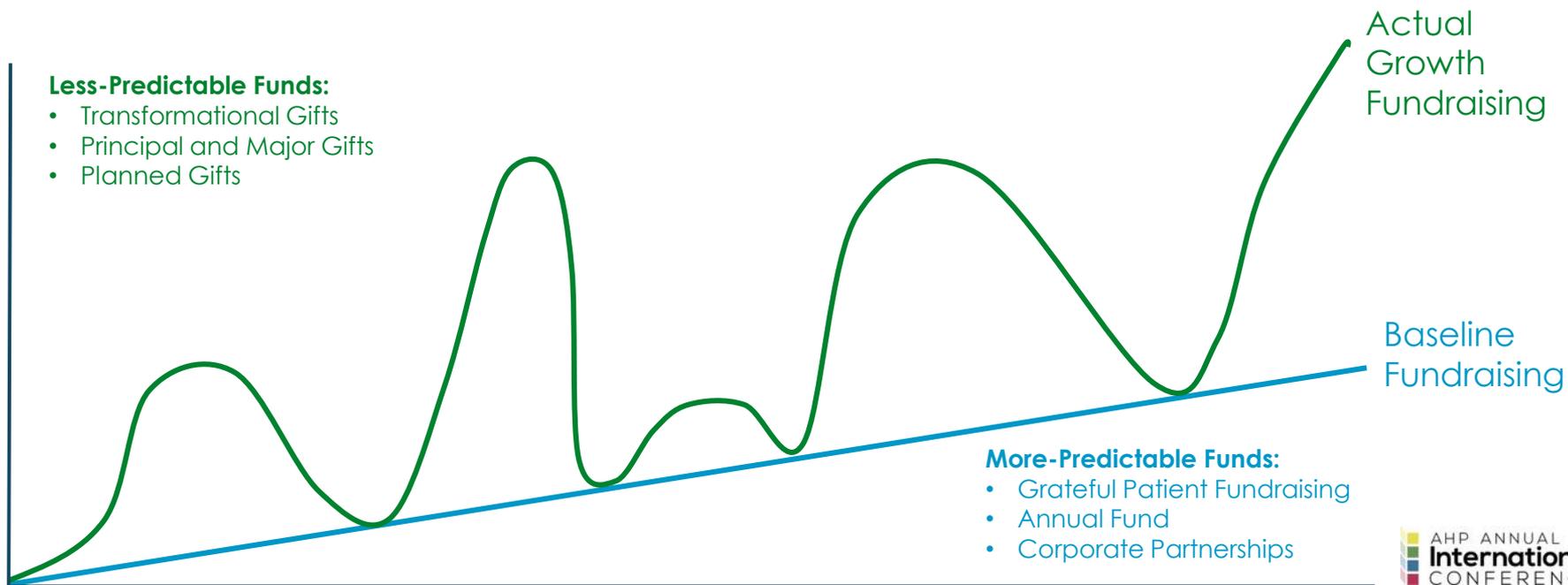
Millennial population  
centers

Benefited from remote  
worker migration

**PANEL DISCUSSION:** What is it like to fundraise in your region today and how are these economic and demographic trends impacting your work?

# The Nature of Fundraising Growth

Success is often steady incremental growth with mighty peaks.





# 1. Principal Gifts Overview





Principal Gifts are a category.

Every institution can secure principal gifts (including you!)

**The only differentiator is the threshold by which they are defined.**

# Core Features

Highly successful principal gift programs have the following features:



Compelling and  
ambitious vision



Fulltime dedicated  
support staff



Robust operations  
and pipeline strategy



Deep relationships  
with prospects



# Compelling Vision

Transformative giving is often linked to funding priorities that have a number of key defining attributes.

Compelling  
social problem

Compelling  
vision for the  
problem

Credible  
pathway to  
success

Proven results

Track record  
for growth

Pathway to  
scale

Clear role for  
philanthropy

Sustainable  
economic  
model

Exceptional  
leadership

Why us  
rationale



# Dedicated Staffing

High performing programs have dedicated principal gifts support staff and a ratio of 1:2 frontline fundraisers to operations.



Prospect Research  
and Data Analytics



Prospect  
Management



Frontline Fundraisers



Involved Leadership



Proposal  
Development



Stewardship



# Robust Pipeline Strategy

Top performing principal gift programs have an end-to-end pipeline strategy, beginning with discovery and qualification.

## QUALIFICATION STRATEGIES

Dedicated Discovery  
Officer

Hybrid Discovery  
Officer / Annual  
Giving Officer

Gift Officers qualify  
their own prospects



# Deep Relationships With Prospects

A principal gift checklist provides a focused process for preparing donors for transformational gifts.

Status	Cultivation Step
<input type="checkbox"/>	Long term non-development engagement
<input type="checkbox"/>	Standalone gift officer relationship
<input type="checkbox"/>	Hospital visit
<input type="checkbox"/>	3+ visits with unit leads
<input type="checkbox"/>	High annual giving
<input type="checkbox"/>	High level board/advisory council service
<input type="checkbox"/>	Engagement with spouse and/or family
<input type="checkbox"/>	Major gift complete
<input type="checkbox"/>	Stellar execution of gift
<input type="checkbox"/>	Custom stewardship of gift
<input type="checkbox"/>	1st meeting with President/CEO (before solicitation)

# Principal Gift Realities

Principal gifts typically take years to cultivate...

10+ years of cultivation

Multiple relationships and intersections with the institution

Typically have a patient experience

But fundraising can happen along the way:





# Panel Discussion:

How do you begin building relationships with prospects who are new to your market and/or who are not yet patients?



# Questions & Discussion



AHP ANNUAL  
**International**  
CONFERENCE





**Meghan Davison**

[Mdavison@ccsfundraising.com](mailto:Mdavison@ccsfundraising.com)

**Darrin Goldin**

[Darrin.goldin@UTSouthwestern.edu](mailto:Darrin.goldin@UTSouthwestern.edu)

**Elizabeth Hormann**

[Ehormann@ccsfundraising.com](mailto:Ehormann@ccsfundraising.com)

**Talmadge Ingham-Johnsen**

[Talmadge.Ingham-Johnsen@vumc.edu](mailto:Talmadge.Ingham-Johnsen@vumc.edu)

Contact us!

We are happy to be  
thought partners

