



# Employee Giving Campaigns:

Grow Engagement with Fewer Resources



# Hello!

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Annual Giving Manager



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# Our Story

*A case study about growth during a time of challenge and limited resources*

*Preface: Context*

*Prologue: 2020*

1. Chapter One: Environment
2. Chapter Two: Resources
3. Chapter Three: Realignment

# Preface: Context





# Banner Health<sup>®</sup>

- Mission: *Make health care easier, so life can be better*
- 11<sup>th</sup> largest nonprofit health care system in the country
- 30 Hospitals across 6 states: AZ, CO, WY, NE, NV, CA
- Primary Care Clinics, Imaging Centers, Urgent Cares, and more!
- Over 54,000 team members, largest employer in AZ



# Better Together

- Est. 2009 in partnership with United Way
- Raised over \$20M since inception
- Our model:
  - *Campaign Champions*
  - *Individualized Goals*
  - *Impact Project*
  - *Individualized Activities and Events*

# Annual Family Camping Trip

- Building tradition
- Predictable
- High resource capacity
- Focus on good time

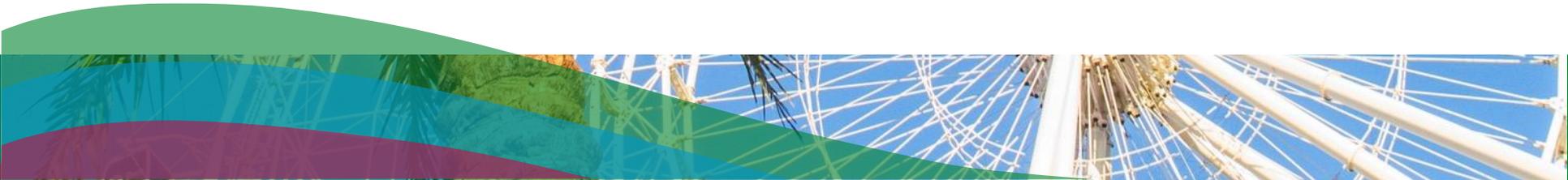




# Prologue: 2020

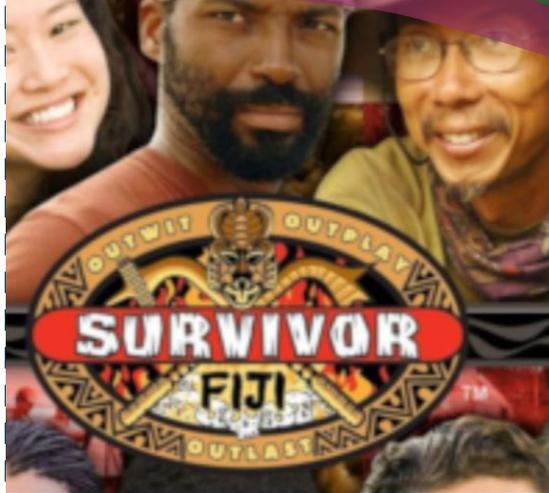


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# Survivalist Situations

- Forging challenge/growth
- Unpredictable
- Limited resources
- Focus on bottom line





# Results

**2019**

*95 Champions*

*7.5 weeks*

*Participation: 41%*

*Fundraising: \$1.7M*

**2020**

*0 Champions*

*3 weeks*

*Participation: 9%*

*Fundraising: \$1.35M*

**100% decrease** in champion hours

**60% decrease** in time

**78% decrease** in participation

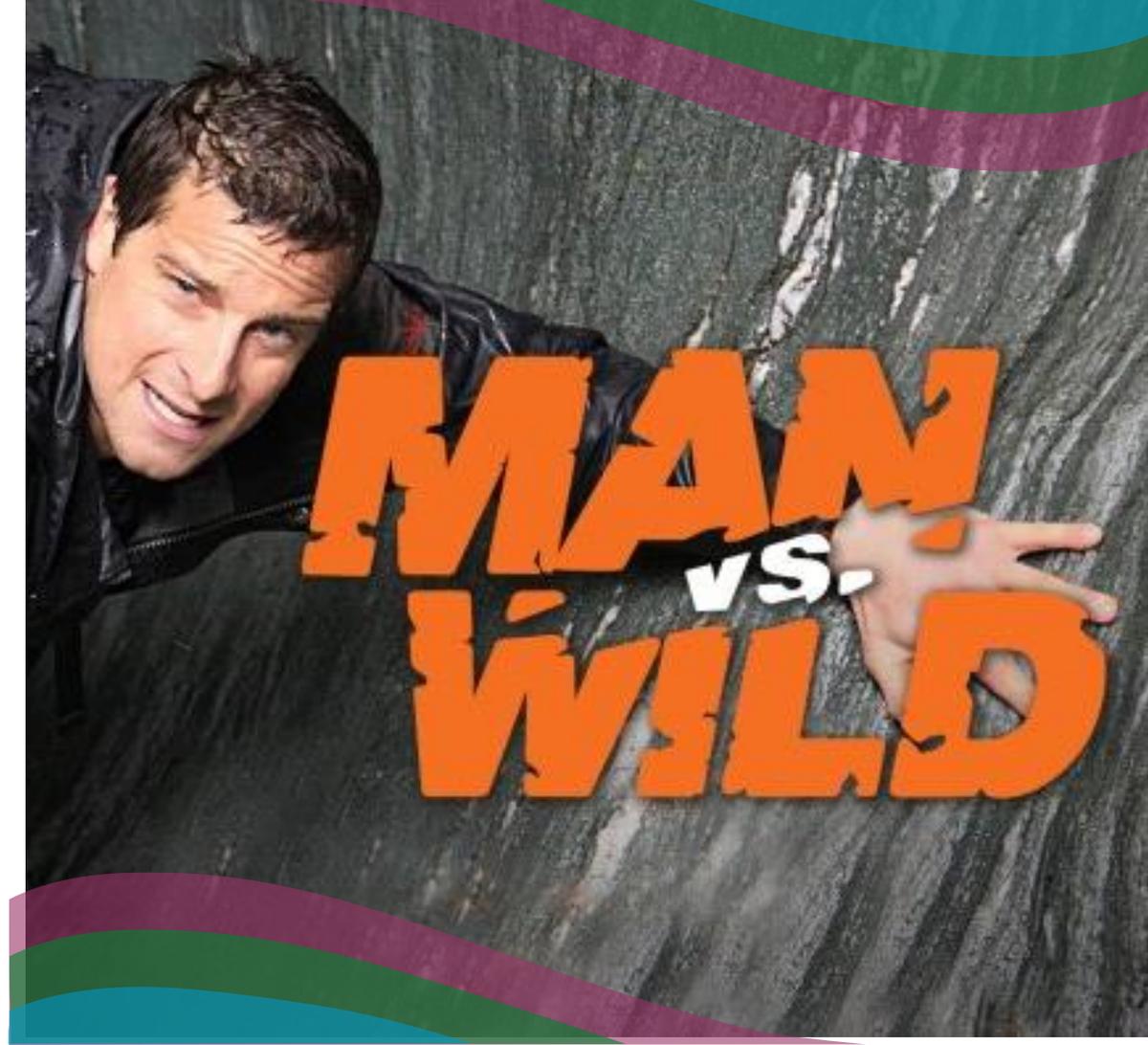
**20% decrease** in fundraising

# Chapter 1: Environment



# The Environment

Survival is dependant on a knowledge and understanding of the environment.





# 2021 Environment Data

## Intel from Leaders

Forecasting from executive sponsor

Insight from CEOs

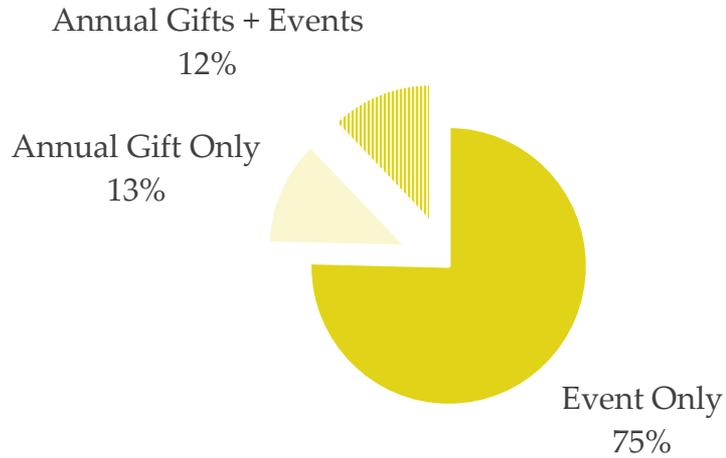
## 2020 Campaign Data

20% decrease in fundraising

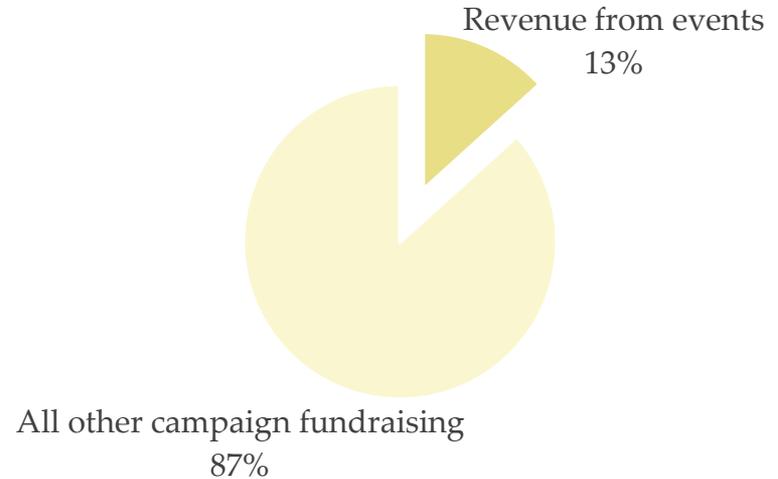
80% decrease in participation



## 2019 Participation Breakdown



## 2019 Fundraising Breakdown





# 2021 Responsive Strategy Shift

- Encourage annual gifts
- Virtualize events
- Reduce campaign time/planning hours



# Results

## 2019

95 Champions

7.5 weeks

Participation: 41%

Fundraising: \$1.7M

## 2020 COVID

0 Champions

3 weeks

Participation: 9%

Fundraising: \$1.35M

## 2021

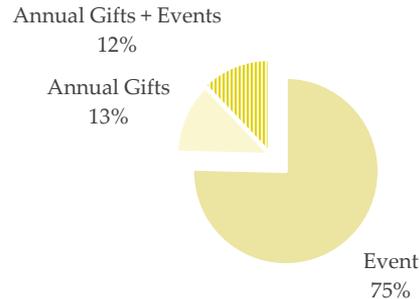
61 Champions

7 weeks

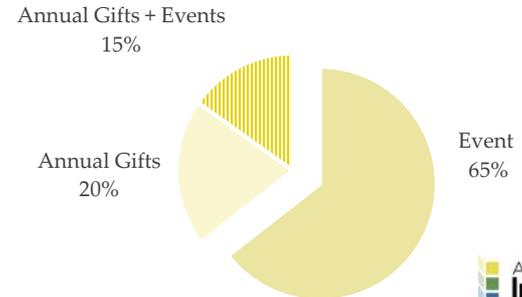
Participation: 29%

Fundraising: **\$1.8M**

### 2019 Participation Breakdown

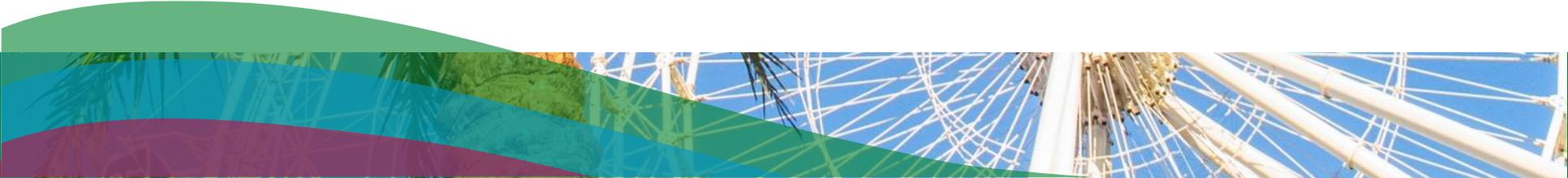


### 2021 Participation Breakdown





**Principle #1:** Evaluate the fundraising environment you are entering



# Chapter 2: Resources



# Resources

Survival is dependant on the evaluation, sourcing, and maximizing of resources.





# 2022 Environment Data

## Inside Intel

Forecasting from executive sponsor

- Workforce shortages/turnover
- More peaks/variants

Insight from CEOs

- Morale low
- Workload high/low resources

Insight from Champions

- Short-staffed
- More on plate

Satisfaction Survey

- Burnout high
- Compensation dissatisfaction
- No autonomy

## 2021 Campaign Data

Record-breaking revenue year

- Focusing on annual giving effective
- Individuals give more when they make an annual gift
- Majority of annual gifts came in the first two weeks of campaign
- Events can distract from Annual Gift\*



# Example:

Banner Facility #5397

**2020**

*0 Champions*

*3 weeks*

*Participation: 8%*

*Fundraising: \$13,563*

**2021**

*1 Champion*

*7.5 weeks*

*Participation: 25%*

*Annual Gift: 5%*

*Fundraising: \$11,764*

*Annual Gift (18): \$9,038*

*Event/Other (78): \$2,560*

**37% decrease** in annual gift participation

**17% decrease** in over total fundraising

**212% increase** in total participation



Conclusion: Events were increasing overall participation; however, they were utilizing a huge amount of resources and distracting from making an annual gift/active gift.





# 2022 Responsive Strategy Shift

- Encourage Annual Gifts
  - No longer count event gifts as participation
- Discourage events, encourage awareness activities
  - Activities that incentivize annual gift
- Cut campaign time/planning hours



# Results

2019

*95 Champions*

*7.5 weeks*

*Participation: 41%*

*Fundraising: \$1.7M*

2021

*61 Champions*

*7 weeks*

*Participation: 29%*

*Fundraising: \$1.8M*

2020 COVID

*0 Champions*

*3 weeks*

*Participation: 9%*

*Fundraising: \$1.35M*

2022

*60 Champions*

*4.5 weeks*

*Participation: 13.6%*

*Fundraising: \$1.9M*

**Reported decrease** in planning hours  
**28% decrease** campaign days

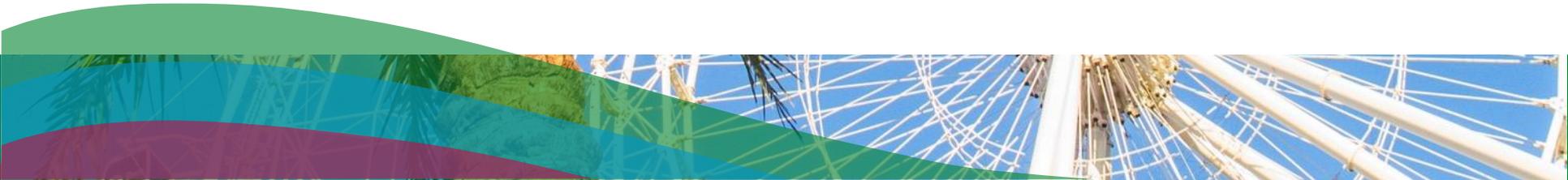
**24% increase** in annual gift participation  
**5.5% increase** in fundraising

**7.5% increase** in fundraising from our highest  
Pre-covid year (2018)



## Principle #2: Resource based on needs and environment

*pro tip: some of the best resources are pulled from environment*





# Chapter 3: Realign



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# Alignment

Survival is dependant on the assessment and alignment of all resources to top needs. Tough decisions are made to abandon some resources in favor of others.



# Realignment of Resources

From → To

## Communications

*Focus on the 'ask'*



*Team member testimonials*

## Recognition

*Champaign tchotchkes*



*Points to reduce health insurance premiums*

## Promotion

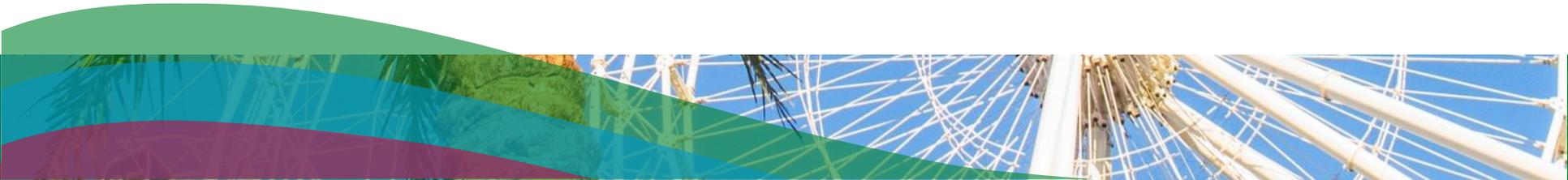
*Events*



*Opportunities*



Principle #3: Realign to the bottom line.



# Culture of Philanthropy

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**S** - *Stop*

**P** - *Plan*

**E** - *Execute*

**A** - *Assess the Results*

**R** - *Re-evaluate*

# Q&A



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# Thanks!

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