



# Zero to Thirty. . . Million: An Unconventional Campaign



# Today's speakers



Sara Alger, CFRE  
Foundatoin President,  
University Health



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Principal Consultant,  
Accordant



# Today's Objectives

1. Learn how to identify and diagnose barriers to implementing change
2. Learn how to present the right solution at the right time to the right audience
3. Learn how to engage executives, volunteer leaders, staff and clinicians and donors to exponentially move the needle.



# University Health At A Glance

- Public Health and Academic Medical Center
- 1 hospital; 41 clinics
- \$3 billion Operating Budget
- 20% taxpayer \$
- 278,000 unique patients
- 75,000 patients in the ED
- Nearly 60% Medicaid/Medicare
- 210 UMA Providers
- Trauma
- Transplant
- NICU
- Women's Health



# University Health Foundation At A Glance in 2020

- Established in 1984
- Events and passive fundraising
- 7 team members
- No infrastructure
- No portfolio
- No pipeline





# Sara's To Do List

- Create Compelling Donor Centric Case For Support
- Develop Team Confidence and Skills
- Build Sound Infrastructure & Operations
- Establish Grateful Patient Strategy
- Activate Volunteer Leadership
- Align with UH Executive Team
- Complete \$30 million campaign





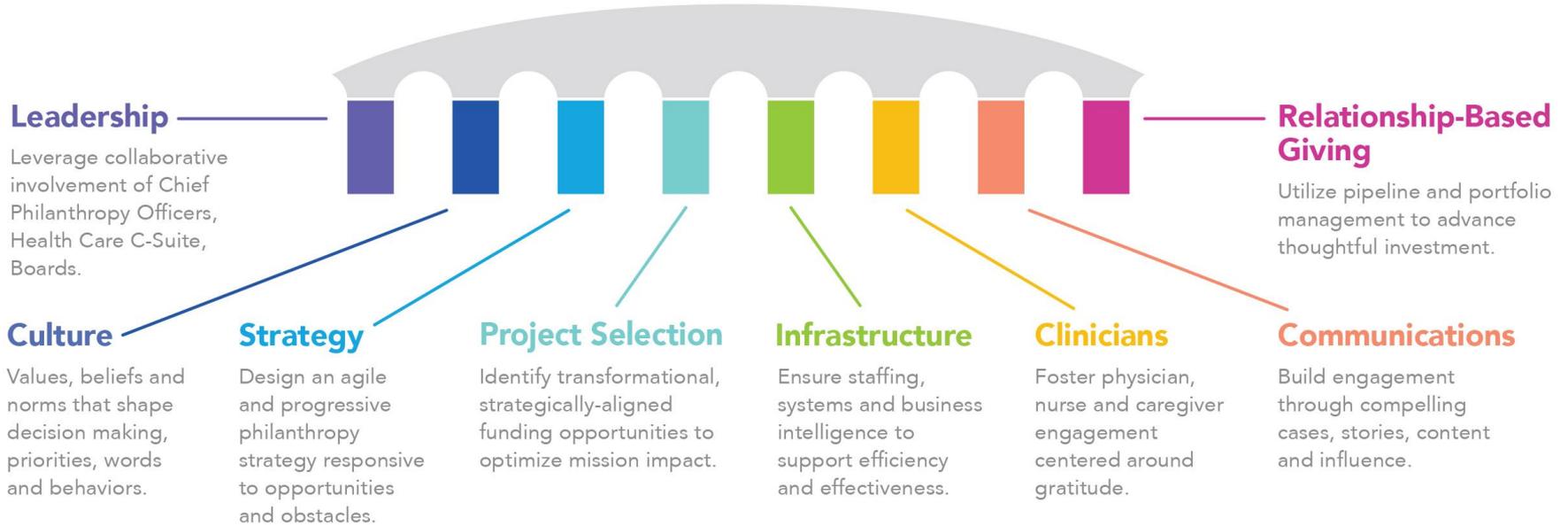
All great changes  
are preceded by  
chaos.”

~ Deepak Chopra



# Transformative Philanthropy™

Create authentic, values-driven, impact-focused relationships with donors.

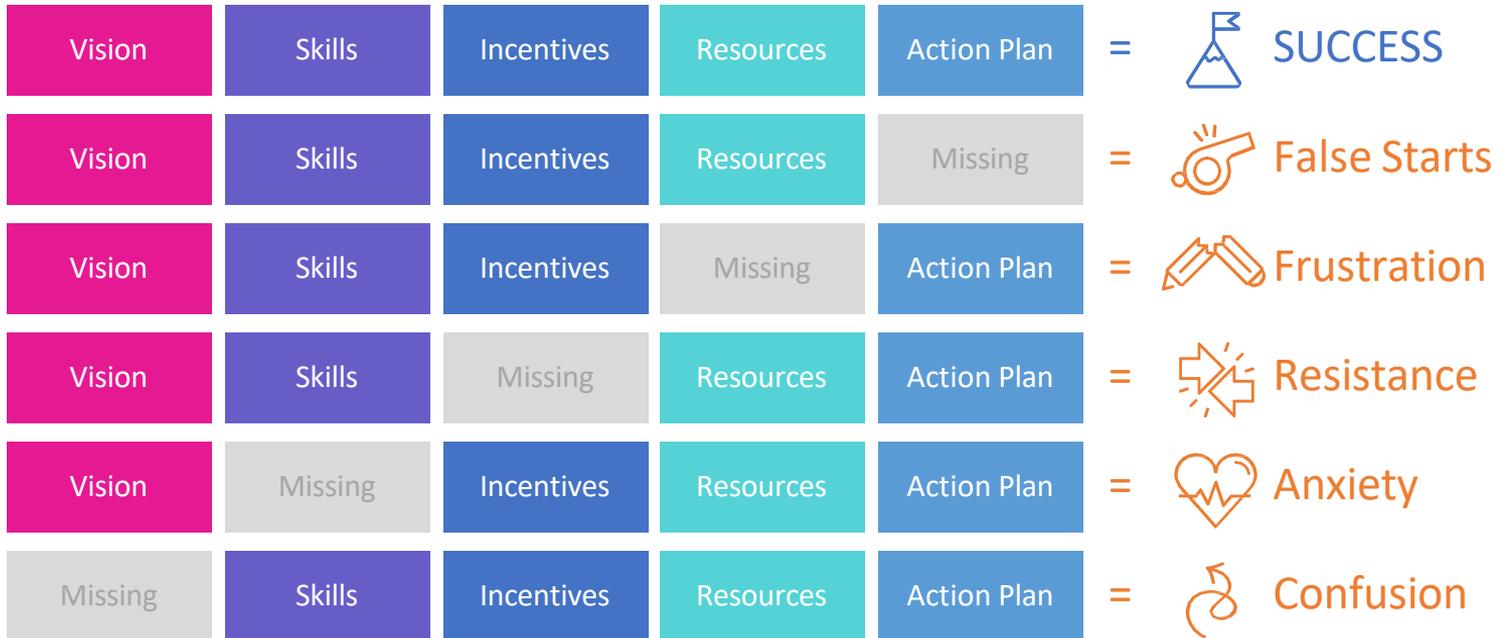


# Managing Complex Change

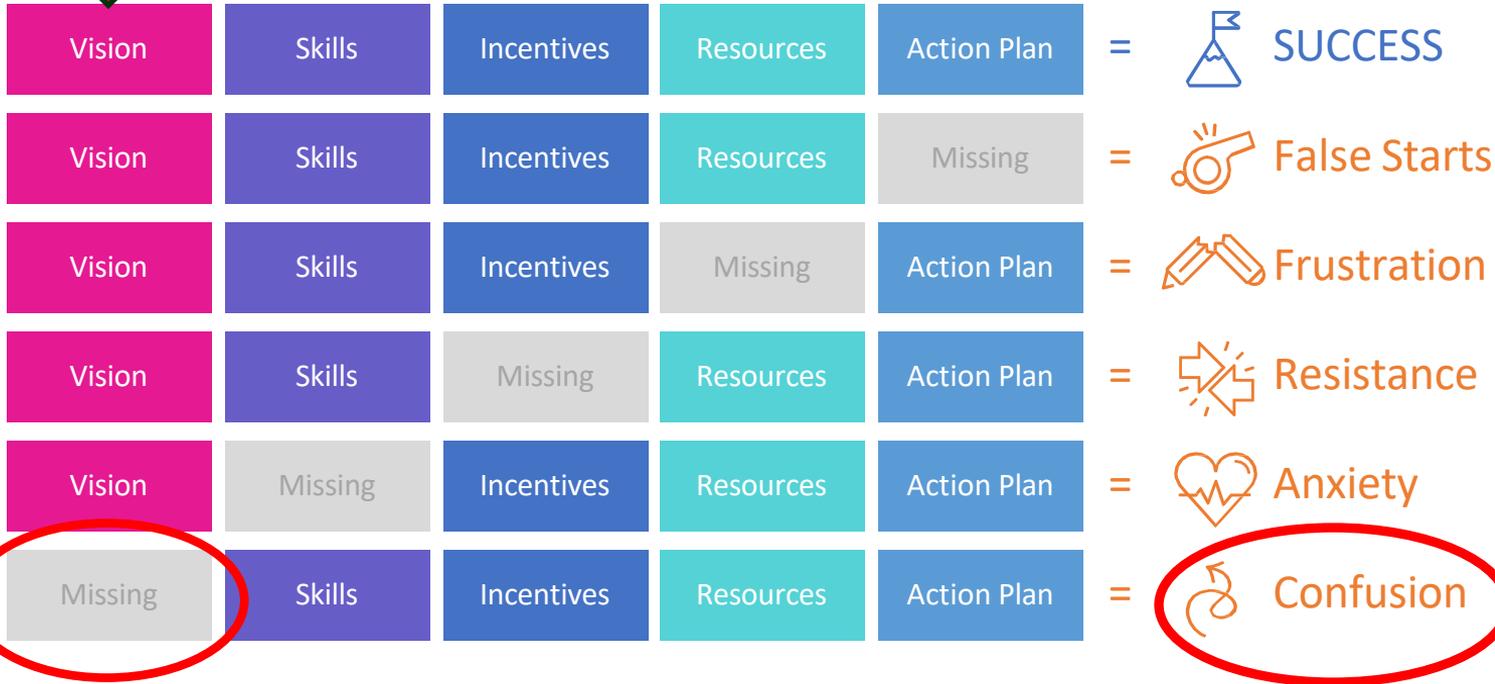


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# Model for Managing Complex Change



# Model for Managing Complex Change



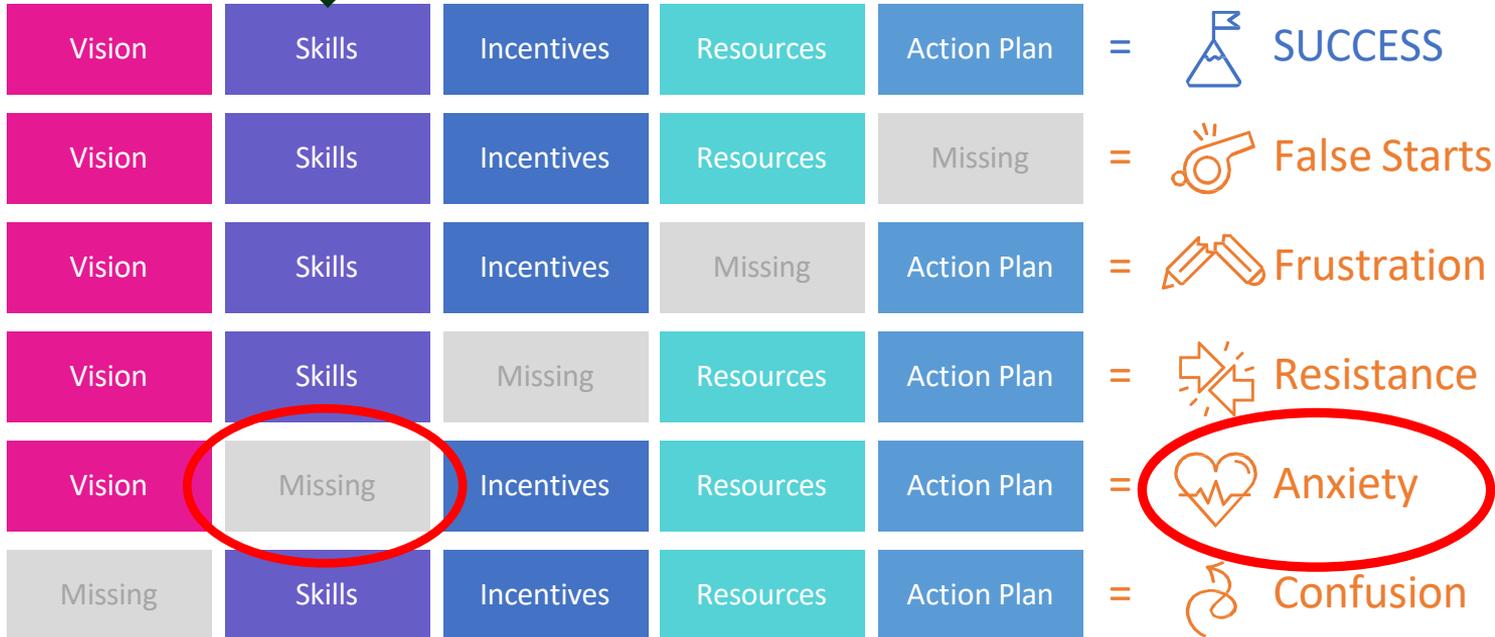


# Confused? Share the Vision

## **Foundation Potential**

- Painter
- Prophet
- Evangelist

# Model for Managing Complex Change

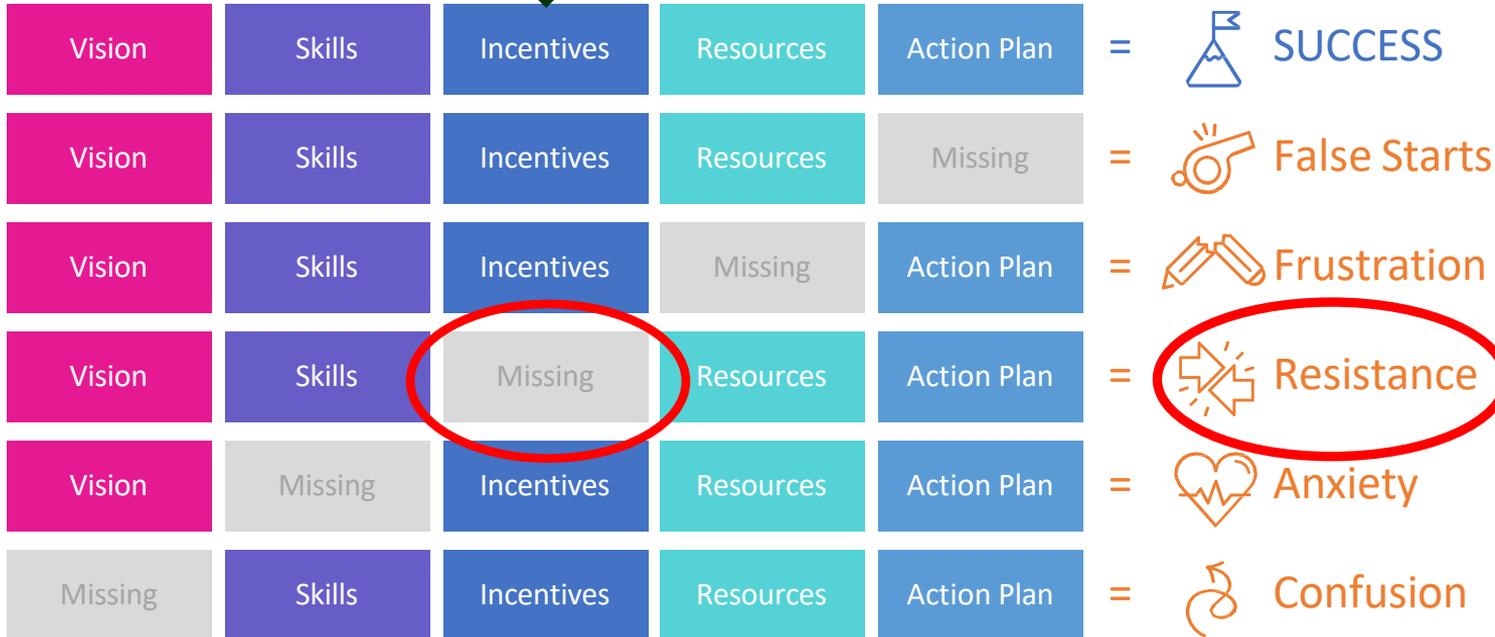




# Anxious? Develop (or Find) Skills

- Back to Basics
- Keep It Simple
- See One, Do One, Teach One
- Embrace the Development Community
- Formal Training
- Hire New

# Model for Managing Complex Change





# Resistance? Uncover the Incentives

## **Deterrent**

Politics

Increased Budget

More Work

Discomfort

Lack of Trust

Embarrassment

**VS.**

## **Incentive**

Engagement

Solutions

Funding

Your WHY

Success

Integrity

# Model for Managing Complex Change



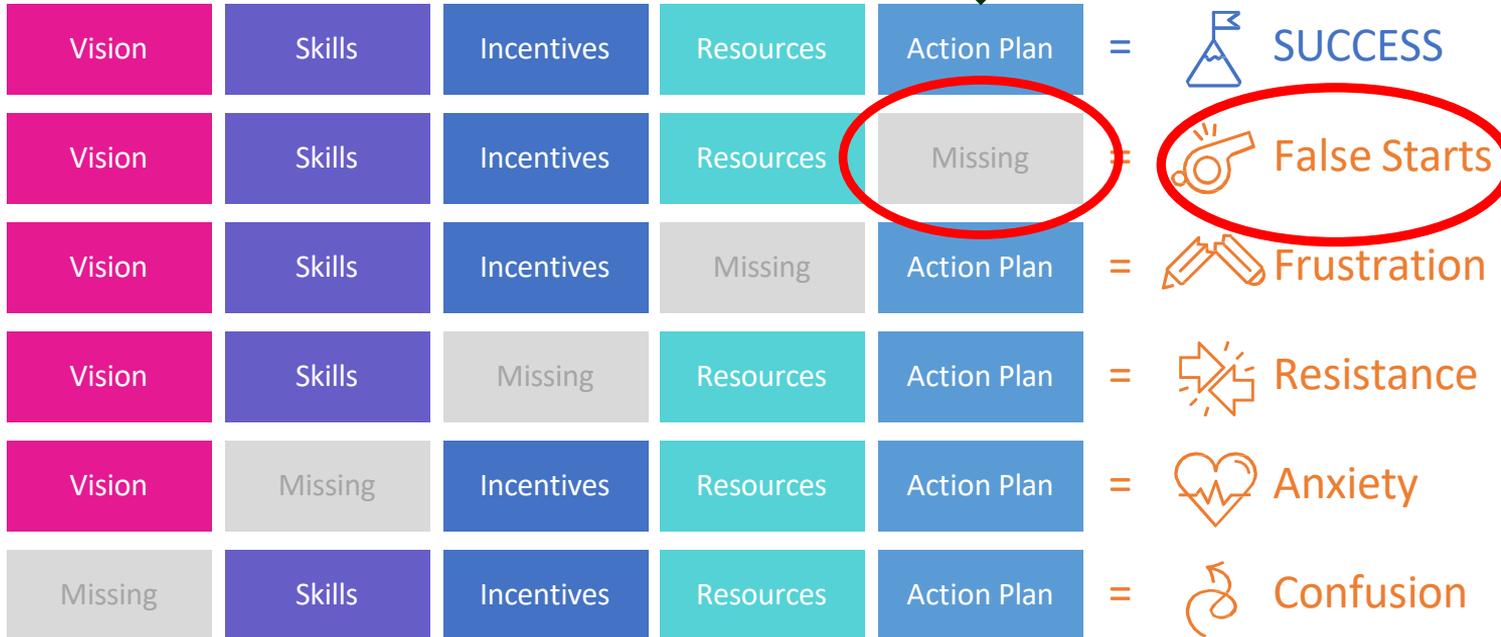
Vision	Skills	Incentives	Resources	Action Plan	=	 SUCCESS
Vision	Skills	Incentives	Resources	Missing	=	 False Starts
Vision	Skills	Incentives	Missing	Action Plan	=	 Frustration
Vision	Skills	Missing	Resources	Action Plan	=	 Resistance
Vision	Missing	Incentives	Resources	Action Plan	=	 Anxiety
Missing	Skills	Incentives	Resources	Action Plan	=	 Confusion



# Frustrated? Acquire/Maximize Your Resources

- FTEs
- Processes, Policies and Procedures
- Moves Management Database and other IT tools and platforms
- Acknowledgement & Recognition Standards
- Executive and Volunteer Leadership's Time

# Model for Managing Complex Change

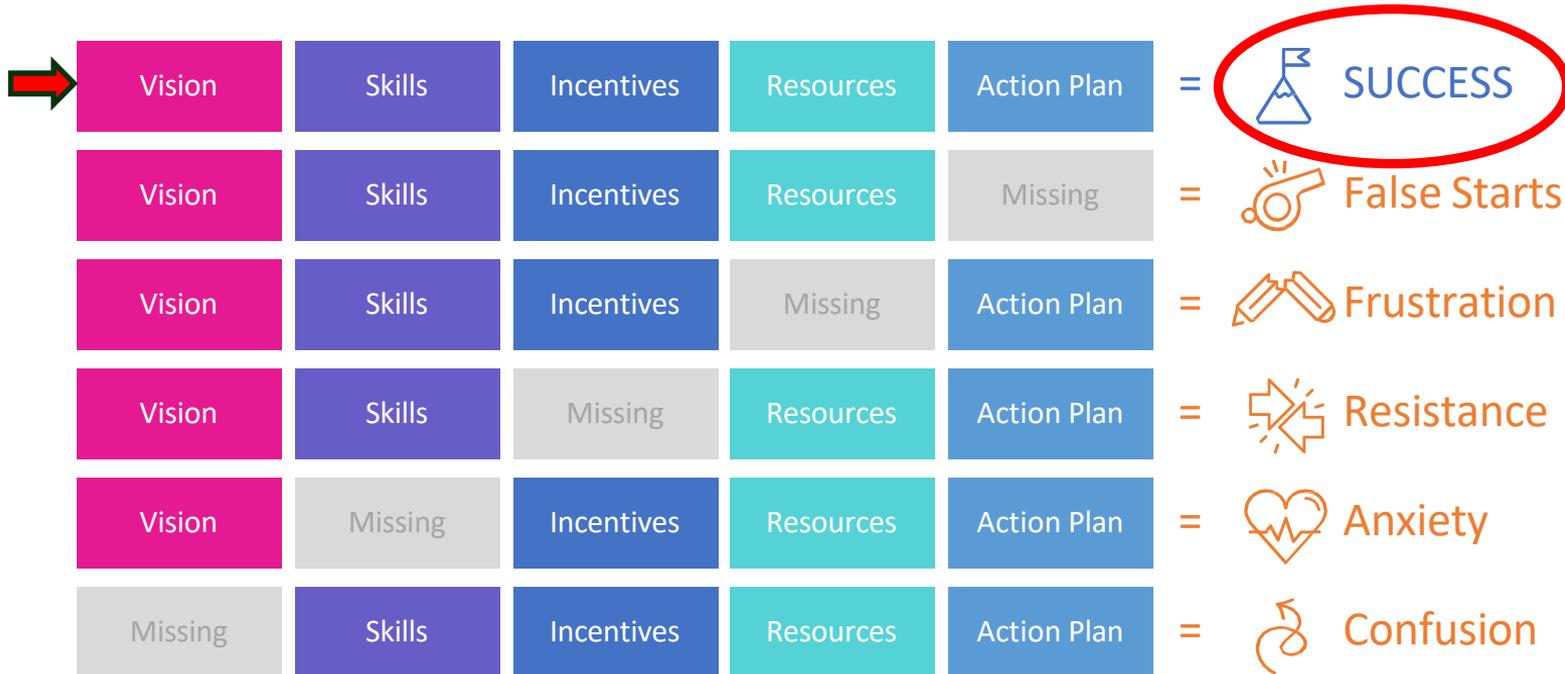


# False Start? Create and Communicate the Action Plan

- Strategies
- Tactics
- Tasks
- Timelines



# Model for Managing Complex Change







# Transformative Giving Before and After



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# New: Focus on Individual Relationships

- Prior sponsorships only, few individual gifts (10 over \$10K in 36 years!)
- Million Dollar May

Prior 36  
years

2021-  
present

11 \$100K+

56 \$10-99K

12 \$1M+

16 \$100-999K

71 \$10-99K

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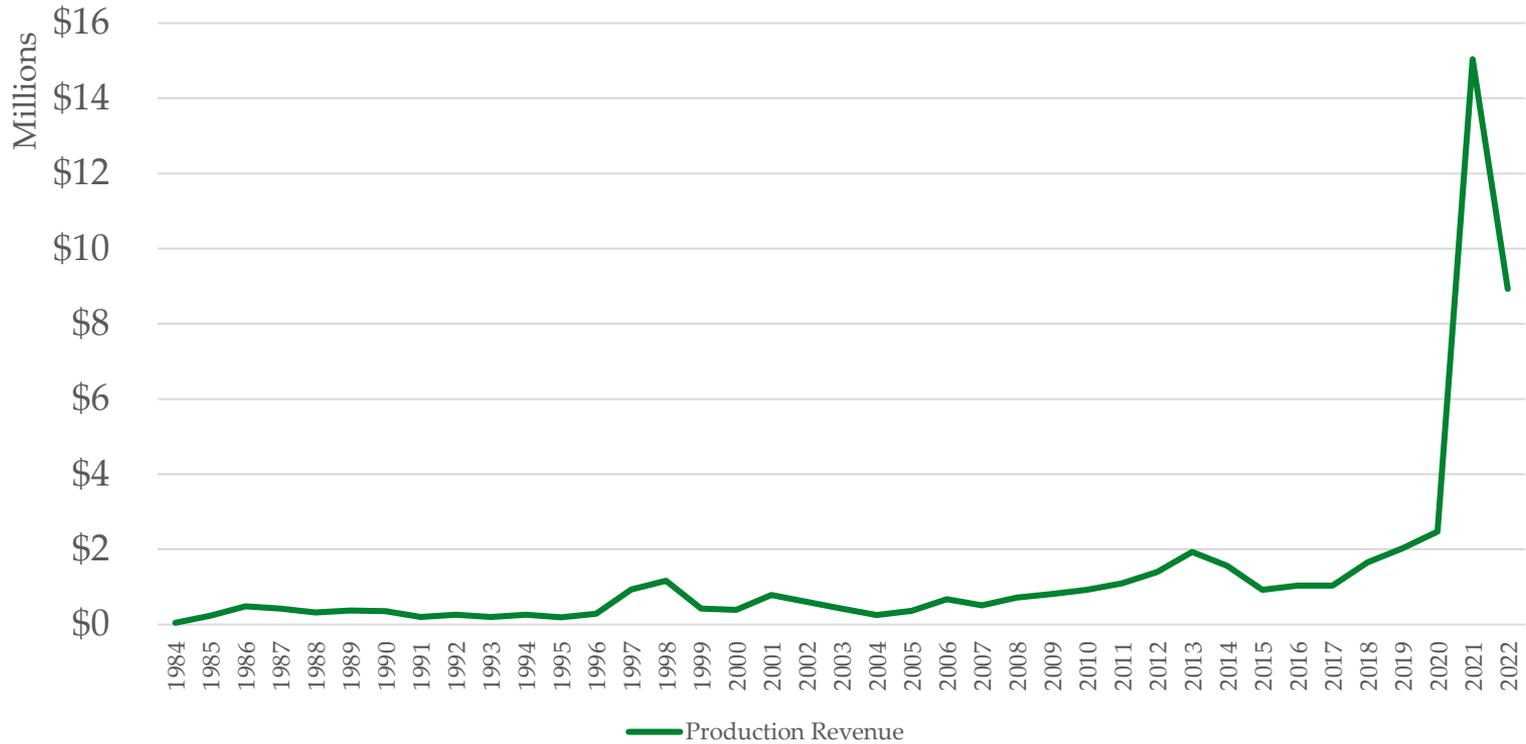


# Cost to Raise a Dollar Plummeted





## Production Revenue





**Closing in on \$30 million = SUCCESS!**





The only constant is  
change.”

~Heraclitus



# What's Next?



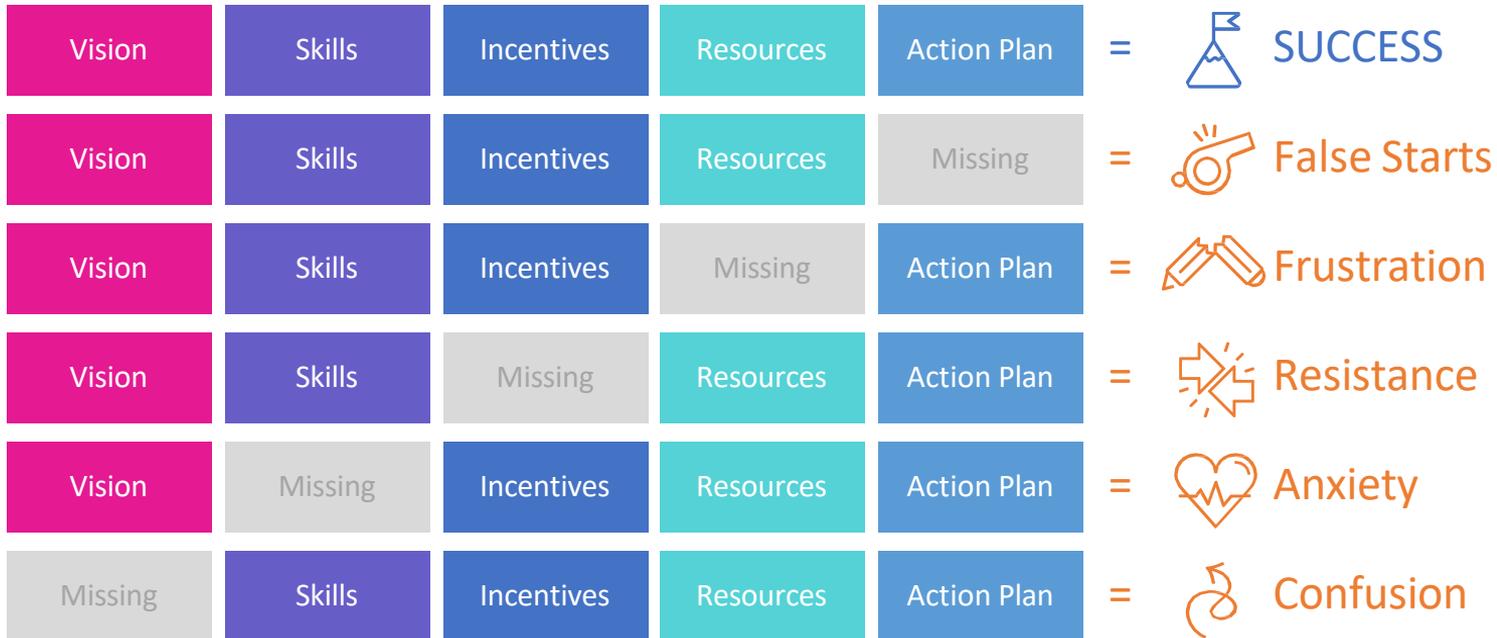
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# Current Challenges

- Donor Stewardship
- Access to Patient Data
- Readiness for Next Campaign

# Model for Managing Complex Change





# Questions?



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Thanks!

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