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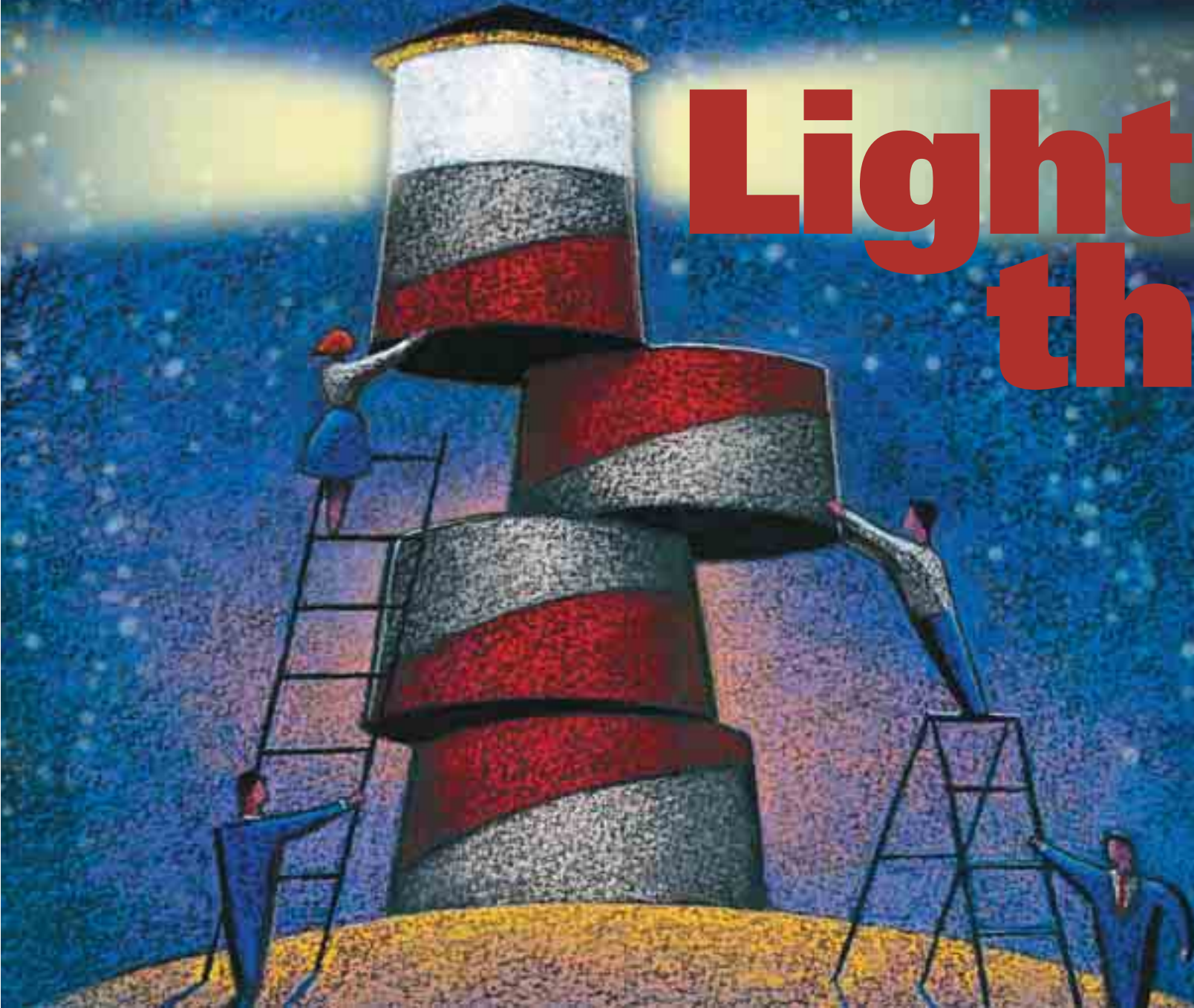


## The data is in: Service excellence cultivates giving

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# Light th



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Imagine your capital campaign is in the earliest part of the silent phase and successfully building on the 100th anniversary of the hospital two years previous. The senior management portion of the employee campaign is going extremely well. Then the world changes:

- The economy sinks.
- The hospital stops construction on several projects including the centerpiece of the capital campaign—a new critical care bed tower.
- As with many hospitals in North America, budgets, people, travel and education are either frozen or cut.

# ing e way: Great results in bad times

## Case Study: Methodist Health Foundation Employee Giving Campaign

What do you do? The leadership and staff of Indianapolis-based Methodist Health Foundation decided to bravely press onward with their employee campaign. Plans were already in place, a dollar goal had been set and employee volunteers recruited—it was just going to be a lot harder than expected. The Lighting the Way campaign had three goals:

1. To raise visibility and awareness for the capital campaign and the foundation.
2. To raise funds for the campaign.
3. To have fun doing it.

### Where to begin?

According to Jim Collins, the noted author of “Good to Great,” leadership and getting the right people involved are two of the five important issues when applying the “Good to Great” concepts in the social sector.<sup>1</sup> At Methodist Health Foundation, these two components were the foundation of a successful employee campaign that raised more than \$2 million from 875 employees in one of the most

difficult fundraising environments in the past 75 years.

But it didn’t happen overnight. The campaign preparation began in the fall of 2008 with the selection of the campaign chair. In May 2009 a cabinet was selected, employee ambassadors recruited and campaign awareness efforts began. The program officially kicked-off in March 2010 and after two extensions closed in December 2010.

To follow are the ten building blocks that led to the tremendous success of this campaign, despite bad timing.

### 1. Leadership

The selection of Chair Jane Manning, RN, and Development Officer Michael Ault to lead the campaign was the first of many good decisions. Manning chaired the last employee campaign in 1991 and Ault had successfully run the 100th anniversary events and other hospital-wide activities.

From there, it was all about letting these two professionals network with their colleagues for advice and then selecting their team.

That team included an employee campaign cabinet of 22 members, which was selected by Manning and Ault with input from the foundation and administrative leadership. Cabinet members were chosen based on a variety of characteristics, including their departmental leadership, popularity and visibility, areas represented, ability to serve as a campaign spokesperson and their influence among employees. From administrative assistants and managers, to directors and executive leaders within the hospital, the cabinet was comprised of a cross-section of employees who had high visibility and were perceived to be champions and figure heads for their departments.

The cabinet in turn recruited employee “Luminaires” who were asked to:

- Be ambassadors for the campaign.

- Communicate with their departments.
- Hang and display posters in their areas.
- Create an opportunity for a presentation to their department.
- If possible, conduct special fundraising activities in their department or area.
- Provide envelopes to those who did not use electronic giving.
- Assist with understanding of the electronic pledge process.

Each cabinet member provided a list of 10 candidates and Luminaires were then selected based on their ability to serve and influence. 152 Luminaires, representing nearly every department within Methodist, as well as suburban campuses such as Riley Hospital for Children and Indiana University Hospital, served as the troops on the ground to implement and execute.

The role of both the cabinet members and the Luminaires was to be an ambassador for the campaign, Methodist Hospital and the foundation. The cabinet, working with the campaign chair and foundation development officer executive, provided direction for the tone and events of the campaign. There were more than 174 employee volunteers supporting the campaign, in addition to part-time help from five foundation development professionals and the support staff at the foundation.

### About Methodist Health Foundation

The foundation supports Methodist Hospital and the communities of central Indiana. The office of 11 includes the president, vice president of development, two development officers, and administrative support staff. The foundation administers nearly 500 funds that support critical care and related health care initiatives for the hospital.

## 2. Passion

In every hospital there are people who are passionate about their work. The new critical care tower is essential to local and statewide future success of the hospital. While not all were initially enthused about philanthropy, they soon saw the need and that philanthropy was an important vehicle to achieve the tower. And, of course, it was going to be fun!

## 3. Fun

“If it wasn’t fun, then it would be just another add-on job in an already busy work environment,” Chair Jane Manning said. “It was an amazing campaign and our most successful ever.” And Manning should know because she’s been with the hospital for more than 39 years. “While there was a template for many things, personalization and flexibility added tremendously. Departments found fun and unique ways to contribute to the atmosphere and the dollars raised.”

Specifically, employees coordinated fundraising activities such as a “treadmillathon,” dog obedience training, pie baking, a chili supper, a cookbook, cake decorating, bake sales and dress-down days. Hubbard and Cravens, the coffee vendor in one of the lobbies, even created a specialty drink and donated part of the proceeds to the campaign.

Throughout the campaign the foundation held reminder events, one with jazz music and coffee and donuts at others. All were designed to keep momentum going and to maintain the visibility of the employee effort.

The campaign timetable also was extended by 60 days to assure that everyone had a chance to participate and to bring back an event that would be the highlight of the campaign victory celebration—the bed race. There were 28 entries with 148 participants. Various teams raced decorated “hospital beds” on the street next to the hospital and raised an additional \$20,035 for the campaign.

It was a grand culmination to a great campaign.

## 4. Preparation

Plans began more than a year before the pre-kickoff event. Preparation included an extremely detailed communications plan and general campaign collateral materials, such as the employee case, frequently asked questions, “how to ask” instructions, fliers, PowerPoint presentations, fundraising suggestions and much more. Giving levels were set and a new category of giving called the Beacon Club was established at one hour’s pay per month for three years. By the end of the campaign there were 331 members in this new club alone.

## 5. Personalization

Using the basic tenants of fundraising, the foundation collected personal stories of employees who had benefited from the hospital’s critical care services and produced videos for online access and other use throughout the campaign. Foundation staff and managers also held individual solicitation meetings.

## 6. Engagement

There were many employees engaged in numerous positions for this campaign. There also were efforts made to involve and solicit satellite facilities, retired employees and employees of physician practices. The development staff made more than 70 department presentations and conducted 261 individual personal solicitations.

Luminaires represented Riley and University hospitals, which along with Methodist represent the three foundation hospitals that originally formed Clarian Health. All Indianapolis campuses received the electronic communications throughout the campaign, including Clarian West Medical Center, Clarian North Medical Center, Methodist Medical

## Creating a culture of philanthropy: Amy's story

Development Officer Michael Ault was in his office one afternoon when Amy Jones, an employee in the hospital's nutrition and dietetics department, stopped in and handed him a check for \$23, which she had split between three campaign funds: the critical care bed tower fund, the physician fellowship endowment and the nursing education endowment. She told him that she had taken her time in making a gift, but after much consideration she realized the campaign was for a very good cause.

"She was so proud to give me that check and she knew in her heart she was making a huge difference," Ault said. "She didn't say it, but I knew that for her this was a big commitment and for us, a great example of the heart and soul of Methodist Hospital. She took time to determine exactly what she could afford to give and because it was so important to her to make a gift, she wanted to hand deliver it. In philanthropy, we talk about 'significant gifts.' To this employee, her gift was a significant gift and it really touched me because it demonstrated our mission and her belief in supporting the hospital—right to the core."

Plaza outpatient centers and off-campus administrative offices.

These efforts were mostly for awareness and to try and communicate with former Methodist employees who may be now working at other Clarian facilities.

### 7. Education

The foundation developed materials to address the importance of the campaign, the history of philanthropy at Methodist Hospital, the need for the critical care tower and the value of the hospital to the community. Staff used these for employee meetings, direct mail, board reports, Web presentations and Luminaire training.

### 8. Communication

During the campaign, the foundation sent all employees a series of eight e-mails signed by the CEO, containing personal employee stories as well as informational updates. In addition, there were weekly e-mail communiqués and updates to Luminaires and cabinet members, and talking points shared at board, campaign cabinet, clinical and managerial meetings. All employees had the option to give online using

the foundation's secure website. Most took advantage of that option, although some used traditional paper response vehicles.

### 9. Promotion

Pre-campaign promotion and awareness-building events included an ice cream social, three donut and coffee sessions and a very successful silent auction during the holidays that raised \$20,500 from 350 items ranging from an \$890 golf package to \$20 restaurant dinner coupons. A second holiday silent auction in December 2010 served as the final campaign event and raised more than \$30,000, putting the employee campaign over the \$2 million threshold and doubling the goal of \$1 million.

During the campaign, significant image efforts were made in high-traffic areas within the hospital, including vinyl window treatments in the cafeteria, banners, hanging signs, posters of what the foundation has donated to the hospital and vinyl wraps for columns within the building. Individual story posters were displayed in break rooms.

No employee promotion would be complete without advertising specialty items. The Lighting the Way

employee campaign had the usual complement, including carabiner light-up pens, stickers, T-shirts and jackets. Luminaires wore blue campaign T-shirts and "Ask Me" buttons every Friday.

Perhaps the largest and most visible promotional item was a three-dimensional, eight-foot-tall, 350-pound lighthouse beacon. It was a replica of the 80-foot "Lighthouse of Health" beacon that has sat atop the hospital since 1933. The replica beacon served as a tote board, lighting up to indicate campaign progress. It was located near the cafeteria, at the confluence of corridors with the highest traffic in the hospital.

## 10. Recognition and Acknowledgement

It has been said that you can never say "thank you" enough. The foundation acknowledged employee campaign gifts through a structured and tiered system of thank you letters and small tangible items. The foundation used progress billboards in high traffic areas to say "thanks," and a stewardship committee of the foundation board is currently coordinating permanent recognition in the new critical care tower.



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*The beacon tote board lighted the campaign progress.*

The employee campaign was so successful, with more than \$2 million dollars pledged, that the general capital campaign co-chairs and the physician campaign chair each asked the foundation to make a presentation to their leadership, to share the accomplishments from the concerted effort of the employee campaign. They also wanted to enhance their campaign programs to make them more fun, like the employees' campaign. That's high recognition!

### Why did it work?

As with many things in life, leadership and passion separate


the average from the outstanding. From the CEO of the hospital, to the president of the foundation, the employee and staff volunteers and donors, everyone stepped up. The challenges were clear and formidable, but through commitment and hard work, the campaign leaders overcame adversity, made it fun and were successful.

According to Betty Stilwell, foundation president, "It was everything we expected and then some. The teamwork and enthusiasm between the employee volunteers and the foundation staff was amazing. Despite all the barriers and the unfortunate timing, everyone went above and beyond. It clearly showed in the dollars committed and the number of people who now understand more about Methodist Health Foundation and the critical care tower."

The major difference between the previous 1991 campaign and the 2010 campaign was the use of multimedia technology. Electronic communication was the primary means by which the foundation informed, educated and solicited employees. Each week, the foundation sent employees an e-mail from the office of Methodist Hospital President Samuel L. Odle, FACHE. Within that message was a link to videotaped stories posted on the foundation's website. Immediately above the video player on the website was a link that directed the employee to the secure gift section of the site.

In addition, the foundation used internal communication tools such as "The Clarian" employee newsletter, the Media Tile internal still-frame video communication monitors in the hospital cafeteria, and the video screens on the monorail that ferries employees, patients and visitors between the three downtown hospital campuses.

Using the Luminaires as troops on the ground to implement activities and serve as goodwill ambassadors was a first for the foundation. Cognizant that many front-line patient care employees do not sit at desks all day, promoting the special events and utilizing the Luminaires on patient floors was significant in overcoming potential communications barriers.

At the end of 2010, plans were already underway to visit with new employees and those who didn't give, but might be ready to make a year-end gift. Timing is important, but not as much as a good case, passionate leadership and a "do what it takes to get it done" attitude. 

*Editor's note: A detailed timeline, sample promotional materials and photos of campaign events can be found on the AHP website at [www.ahp.org](http://www.ahp.org), Publications and Tools >AHPJournal >AHPJournalArchives >Spring2011AHPJournal.*


### References

<sup>1</sup>*Good to Great and the Social Sectors: Why Business Thinking Is Not the Answer; A monograph to accompany Good to Great,* by Jim Collins, 2005.



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