

FUNDRAISING EVENTS AS A MARKETING STRATEGY: STAKEHOLDERS AND RESULTS

2019 NAVREF ANNUAL

TUESDAY, SEPTEMBER 17

1:30 pm to 2:45 pm

San Antonio, TX



INTRODUCTIONS



Kevin Hull, JD
Executive Director, WISE
Chicago, IL



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Executive Director, TVAMRF
Columbia, MO

EXPECTATIONS



Marketing 101 for the NPC



Goals for Development



TVAMRF and WISE examples



Wrap Up / Q and A

WHY MARKETING?

- I. “Flexible funding mechanism” requires us to be VA R+D’s advocate to achieve the goals of our collective mission – we need to trumpet our successes, most especially those of our client PIs

We play a “critically-important role in advancing bio-medical research discovery”

“clinical studies are hope transformed into action: saving lives by discovering revolutionary ways to diagnose and treat disease”

- II. Marketing helps build awareness to address the oft-issued claim that no one knows about the NPC

- III. Influence

Turning friends into Donors or even event Sponsors

Advancing policy priorities for NAVREF

- IV. Board of Directors

Vehicle to rally Board members

Inspire self-directed support

Recruitment of Community Members

WHY FUNDRAISING?

WHY NOW?

MARKETING 101 FOR THE NPC



Terminology

Advancement
Public Relations
Development
Marketing



Proven Examples

MD Anderson
ImermanAngels
Wounded Warrior
Project
Welcome Home

DEFINITIONS PHRASES
TERMINOLOGY
TAG
GLOSSARY
TERMS DESCRIPTIONS
VERNACULAR NAMES WORDS
LABELS

ADVANCEMENT

The programs for building awareness and securing support from all constituent bodies (aka **STAKEHOLDERS**) for your NPC.

Public Relations

Mission/Vision/Statement of Purpose
Digital Media
Community Outreach

Development

Community prospects
Corporate prospects

Government Relations

VA station / NPPO
Academic Affiliate
Board of Directors
NAVREF

marketing

ADVANCEMENT

Public Relations

The activity of ***developing public awareness*** among opinion leaders and the general public; and the attitude of the public toward an organization.

Mission/Vision/Statement of Purpose

Digital Media

- Social Media
- Website
- Search Engine Optimization

Community Outreach

- Display materials
- Speaker's Bureau
- Press releases

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ADVANCEMENT

Public Relations

Development

The total process by which we increase **public understanding** of our mission and acquire financial support for our programs.

Community Prospects

- Individuals
- Veteran (non-Veteran) Service Orgs.
- Other Nonprofits

Corporate Prospects

- Community grants
- Event Sponsoring
- Program Partnerships

Individual Prospects

- Volunteers
- Program Partnerships
- Donors
- Community Board Member?

ADVANCEMENT

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Public Relations

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Digital Media
Community Outreach

Development

Community prospects
Corporate prospects
Individual prospects

Government Relations

VA station
Academic Affiliate
NPCs/NAVREF

marketing

ADVANCEMENT

Public Relations

Development

Government Relations

The total process of influencing public and government policy at all levels. It is the advocacy efforts of your NPC to influence decisions made by external offices that in turn affect your NPC.

VA Station / NPPO

- Research Admin, Staff
- VA PIs
- NPPO
- STAR
- Billing, CIRB, Ethics
- Clinical services

Academic Affiliate

- IRB, Compliance, Legal
- Finance offices
- Research Admin, Staff
- Deans / Leadership

Board of Directors

- Statutory Members
- Community Members
- PIs

THE UNIVERSITY OF TEXAS
MD Anderson
~~Cancer Center~~

Making Cancer History®



**WOUNDED WARRIOR
PROJECT®**



**IMERMAN
ANGELS**

Your One-on-One Cancer Support Community



WELCOME HOME
A COMMUNITY FOR VETERANS



Truman VA
Medical Research
FOUNDATION



TEAM
RWB

GOALS FOR DEVELOPMENT



Development



Community Prospects

ADVANCEMENT

Public Relations

Development

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Community Prospects

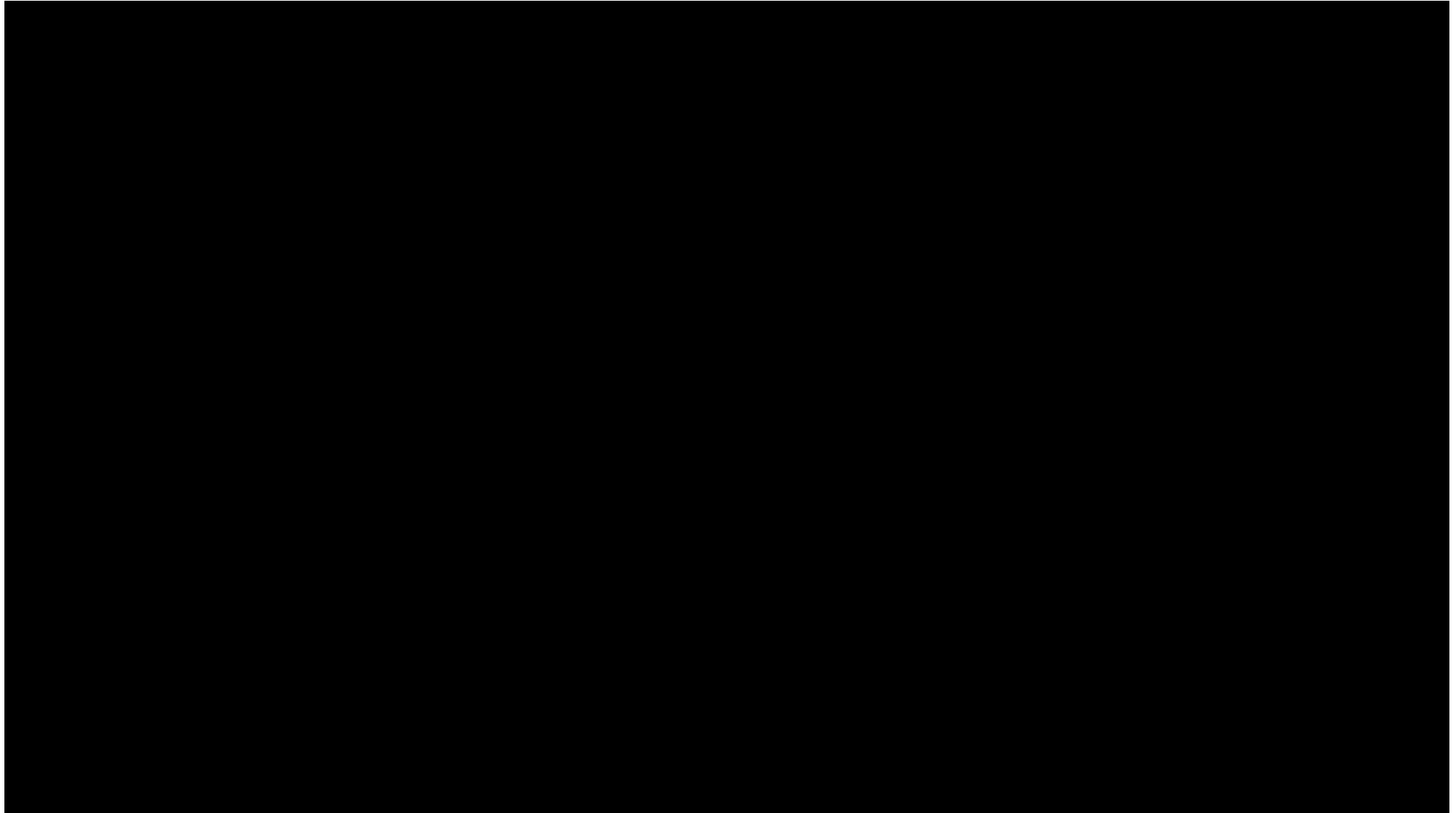
- Individuals
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- Other Nonprofits

Corporate Prospects

- Community grants
- Event Sponsoring
- Program Partnerships

I have scarce resources:

- ✓ Limited personnel
- ✓ No extra time
- ✓ Lack development experience
- ✓ Not enough budget
- ✓ Board approval



Development as a revenue stream: **Make. A. Plan.**



1. Define and identify your programs and the values associated with your NPC. (*Public Relations*)
2. Define and identify stakeholders and their communities with these values in mind.
3. Broadcast your program and its values through purposeful actions targeting your stakeholders and communities. Drive willing people to your message. (*Public Relations/Development*)
4. Identify your key stakeholders and leverage their delight and awareness of your programs into financial support.

Development as a revenue stream: [Make. A. Plan.](#)



Before and during an event - Forrester 3 Es of Customer Experience

- **Ease** – It's not difficult for customers to get value from the experience
 - ✓ Awareness of event
 - ✓ Registration of event
 - ✓ Arriving and participating in event
- **Effectiveness** – the experience delivers value for the customer – they got what they needed
- **Emotion** – Customers feel good about the experience
 - ✓ Shares on social media, anecdotally to their peers
 - ✓ Likes event swag
 - ✓ Signs up again for the following year





- July/August – Plan was formulated - Veterans Day was on a weekend.
- GOAL: Both honor Veterans and Raise awareness of the NPC.
 - Healthy activity focused.
 - Use event stage to express the NPC purpose and share its values.
 - “Charity Run” – marketing tool to generate participant interest, gauge charitable awareness
 - Confirmed with Director Finance on how to handle Revenue and Expenses used for the purposes of finance.
 - Forrester 3 E of customer experience. (web registration, nice event swag, professional event company)
 - VA station staff promised volunteers, public relations assistance
 - ‘Push’ marketing strategy – expensive – also up against congressional election ads.
 - ✓ TV ads
 - ✓ Radio ads
 - ✓ Some digital marketing (facebook, twitter)
 - Budget was left open as a promise of a large donation by Board of Director employer’s foundation
 - Seek event sponsorship from Board and local veteran owned businesses



My key sentence:

“...(the event) marks the beginning of a community footprint we create from which to build charitable awareness for our mission. Our goal is a consistent presence in that ‘space’ through well run veteran focused, healthy events. Within that space we partner the marketing of the veteran focused research projects we support. Overall, this presents a mission that will attract community donors interested in sponsoring the true mission of work for the long term.”



Goals

- 1) Forrester 3 E CX
- 2) More participants year over year
- 3) Cut advertising budget by 2/3rds
- 4) Graphics reusable for consistency
- 5) REVENUE > EXPENSES



How to be a Master at Networking

Here are ten action-packed tips from the book that you can use to expand your network and build stronger, more valuable relationships.

- #1 Create Your Relationship Action Plan
- #2 Be Interesting
- #3 Make People Feel Special
- #4 Help Others
- #5 Join New Social Circles
- #6 Become a Master Mentor/Mentee
- #7 Be a Super Connector
- #8 Have a Social Media Strategy
- #9 Diversify Your Network
- #10 Don't Forget the Follow-Up

Well there you have it! Ten action-packed tips to help you grow your network and build stronger relationships.

Want to learn more about making new connections? Check out these articles:

[How to Increase Your Influence](#)

[7 Ways You Can Be Socially Successful](#)

[10 Ways to Rock a Networking Event](#)

ABOUT VANESSA VAN EDWARDS



[Vanessa Van Edwards](#) is a published author and behavioral investigator. She is a Huffington Post columnist and her [courses](#) and research has been featured on CNN, Forbes, Business Week and the Wall Street Journal. As a published Penguin author, Vanessa regularly speaks and appears in the media to talk about her research. She is a sought after consultant and [speaker](#).

Assessing Your Spheres of Influence: How to Get Started

Input Contacts into Excel to create a master tracking sheet, adding notes where possible:

Name	Title	Company	Note1	Note2	Note 3
Astrid Larsen	VP	NextLevel Health	Met at IMD event July 2019	Formerly with NU	Gov't Affairs
Kate Liebelt	Manager	Deloitte	Impact Day POC	Research Week volunteer	MATTER Mentor

Score / Label Contacts according to type of relationship / status:

N=New F=Friend G=Guest D=Donor S=Sponsor

Assign Action Plan for each Contact:


Include in PR Invite to Research Week / Events Send Annual Report

If Donor: Schedule Visit Send Annual Appeal Meeting with Board Member

Review Contact list annually to ensure all information is accurate, updated

Developing Community Partnerships to Create Fundraising Opportunities

Case Study: Research Open House



WESTSIDE INSTITUTE
FOR
SCIENCE & EDUCATION

Advancing the health and wellness of Veterans served by the Jesse Brown VA Medical Center -- "Chicago's VA"

CELEBRATING VA RESEARCH

The Board of Directors of the Westside Institute for Science and Education (WISE) invite you to our first-ever Open House to celebrate VA Research and WISE:

Thursday, September 24, 2015
4:00 p.m. – 7:00 p.m.
Illinois Medical District Commission offices
2100 W. Harrison St. Chicago 60612

The event is free and open to all, with limited parking available.

Join colleagues and supporters from industry, philanthropy, and advocacy to celebrate Chicago's VA, as well as have an opportunity to support WISE's efforts to empower research and education programs at Jesse Brown VA.

- **Women's Health**
- **Prosthetics & Robotics**
- **Heart & Stroke**
- **Cancer**
- **Blind Rehab**
- **Integrated Medicine**
- **Mental Health/TBI**
- **Pain**
- **OIF/OEF/OND**

COMMUNITY SPONSORS: JOIN WISE'S FOUNDER'S CIRCLE

In conjunction with our upcoming Open House, we invite community sponsors to support WISE's work with military veterans and gain the following:

- ⇒ **Induction into WISE'S Founder's Circle**
- ⇒ **Signage at Open House**
- ⇒ **Website recognition**
- ⇒ **Collaborative marketing for your Awareness Month**

A **\$15,000** contribution to join the Founder's Circle will cover one month of WISE's operating costs

Please direct all inquiries to:
Kevin Hull
Executive Director, WISE
(312) 925-6085
Kevin.Hull@va.gov

Learn more about WISE:
www.WISEChicagoVA.org



- Board Member offered space to use; In-Kind support kept costs low
- Wounded Warrior Project as Sponsor + individual donors helped net \$5,500
- 88 attendees drawn from then-existing spheres of influence, including Affiliates
- Featured PIs who were able to speak of the value, performance of the NPC
- Great opportunity to engage Board Members, especially Statutory Members



Thank You to our Event Sponsors!



Simple. Personal Giving.



ILLINOIS MEDICAL DISTRICT COMMISSION



A DECADE OF SERVICE.
10 YEARS
WOUNDED WARRIOR PROJECT
A LIFETIME OF COMMITMENT.



ASAFEHAVEN CATERING



The House of Glanz Wine Merchants
Est. 1888



ABDI
ASSOCIATED BEER
DISTRIBUTORS OF ILLINOIS

Developing Community Partnerships to Create Fundraising Opportunities

Case Study: McCormick Foundation



August 2, 2018

Mr. Kevin Hull
Executive Director
West Side Institute for Science and Education
820 S. Damen Ave. (151)
Chicago, IL 60612

Dear Kevin:

I am pleased to inform you that on July 31, 2018, the McCormick Foundation approved a \$50,000 grant to West Side Institute For Science And Education (“Grantee”) for one year of technical support for further board development, strategic planning to execute a merger, and accounting support.

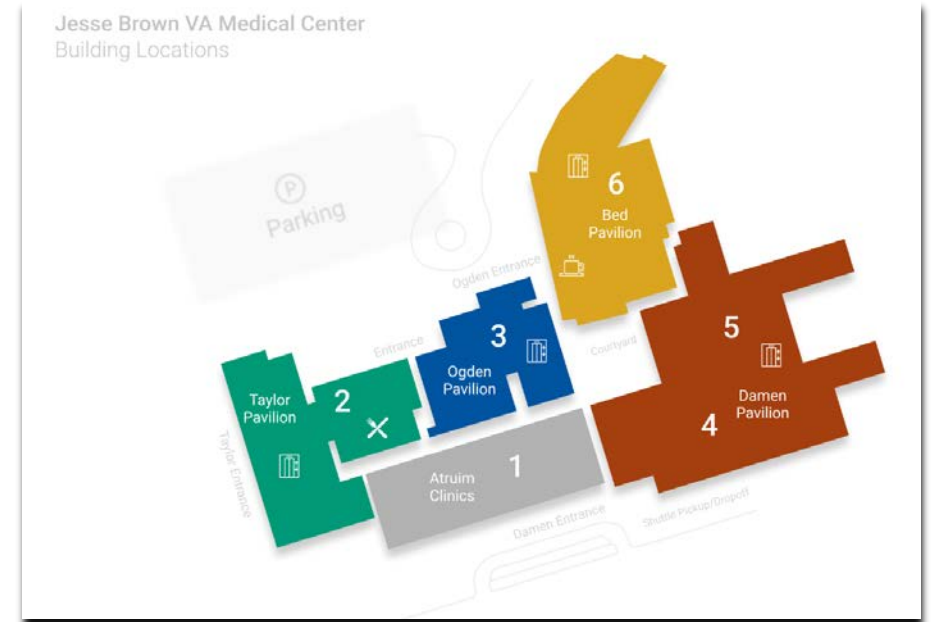
- Existing relationship with foundation grants staff alerted to the funding opportunity
- Successive meetings with Board identified several key funding needs for the NPC
- Other grantees provided our NPC the chance to develop new relationships and further develop existing relationships
- Award provided chance to trumpet our success to key stakeholders as it built Board confidence in Executive Director
- Provides NPC chance to leverage successful award to new foundations

Developing Community Partnerships to Create Fundraising Opportunities

Case Study: Deloitte



Improvement Project – Impact Day 2017



Wayfinding Project – Impact Day 2019

Developing Community Partnerships to Create Fundraising Opportunities

Case Study: Deloitte

Key Interview Takeaways | Strengths, Weaknesses, Opportunities, Threats

Monitor **Deloitte.**

West Side Institute for Science & Education

Visioning Workshop Materials

Deloitte Consulting LLP
November 8, 2016

WEST SIDE INSTITUTE
FOR
SCIENCE & EDUCATION



Board Retreat November 2016

Strengths

1. BOD expertise, institutional knowledge, and industry / academic networks
2. Current researchers engaged with WISE have favorable impression
3. Rekindled and emerging relationships with existing and new Affiliates (UIC, Northwestern, Rush, U Chicago, Loyola)
4. Strong relationships with Veterans through JBVAMC
5. Physical space for research at JBVAMC
6. Easier contracting / staffing than JBVAMC

Opportunities

1. Attract more researchers to JBVAMC and Affiliates by lessening the administrative burden of research
2. Strengthen relationships with Industry (CROs, Pharma, etc.) – specialize in Phase I research
3. Drive a broader research agenda at JBVAMC and Affiliates (e.g. health services research and grant opportunities)
4. Identify best practices from high-performing NPCs at other VAMCs

Weaknesses

1. Lack of awareness of WISE and its offerings, across JBVAMC, Affiliates, and potential Industry Partners
2. Need efficient operational platform to provide study coordination, document management, budgeting, IRB support, grant writing, data analysis, etc.
3. Need to strengthen relationships between JBVAMC and Affiliate Leadership
4. Budget constraints for hiring staff

Threats

1. Sufficient funding to sustain operations
2. JBVAMC leadership prioritization of research
3. Unclear partnering terms with Affiliates, particularly around assignment of Indirect Costs and Partnership Terms (invoicing)
4. VHA keeping Research as priority

Take-Aways

- 1) Understand your NPC and be consistent. Consistency is branding.
- 2) Understand Advancement, Development, Public Relations and how marketing feeds through.
- 3) MAKE.A. PLAN.
- 4) Get your approvals.
- 5) Know your audience, sell your event, sell your mission and get results.
- 6) What's next? Learn and grow for the next event.