

FUTURE OF NURSING™

Campaign for Action

AT THE CENTER TO CHAMPION NURSING IN AMERICA

Robert Wood Johnson Foundation



Increase Your Funding Capacity: Creating an AC Development Plan

Webinar Summary
May 6, 2013

Participants:

Susan B. Hassmiller, PhD, RN, FAAN, Senior Advisor for Nursing at the Robert Wood Johnson Foundation (RWJF) and Director, Future of Nursing: Campaign for Action

Casey R. Shillam PhD, RN, Assistant Professor, Johns Hopkins University School of Nursing, consultant to the Center to Champion Nursing in America (CCNA) and former California Action Coalition co-lead

Alexia Green, PhD, RN, FAAN Texas Tech University Health Sciences Center, co-lead Texas Team

Jay Spitulnik, EdM, CPT Adjunct Assistant Professor, University of Rhode Island College of Nursing, Rhode Island Action Coalition co-lead.

Background

Action Coalitions in 50 states are actively involved in implementing the recommendations in the 2010 landmark report by the Institute of Medicine. The eight recommendations – on education, leadership, practice and care, interprofessional collaboration and diversity – are the blueprint for the future of nursing in a patient-centered health care system.

To implement these recommendations the Action Coalitions need to raise funds, adopt effective fundraising strategies and identify potential donors.

Webinar Goals

- Understand principles of fundraising
- Identify mechanisms of Action Coalition support
- Determine structure of the Action Coalition Development Team
- Learn about examples of successful fundraising strategies

Across the country, there is a movement to advance the field of nursing so that all Americans have access to high quality, patient-centered care in a health care system where nurses contribute as essential partners in achieving success. This national level [Future of Nursing: Campaign for Action](#) is a result of the Institute of Medicine's landmark 2010 report on the [Future of Nursing: Leading Change, Advancing Health](#).

The *Campaign for Action's* field-based teams, the [Action Coalitions](#) (ACs), are leading this movement and are equipping themselves with knowledge gained from technical assistance provided by the Center to Champion Nursing in America (CCNA), a joint initiative of AARP, the AARP Foundation, and the Robert Wood Johnson Foundation. Such technical assistance comes in the form of webinars, face to face interactions, and other facilitated engagements with public policy leaders, content experts, consultants, and Action Coalition peers across the country.

Webinar Overview

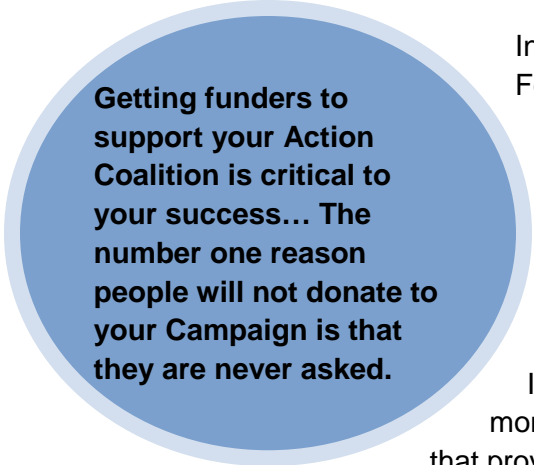
A corner stone of any project is financial sustainability, says **Hassmiller of RWJF**.

“Your long-term sustainability as an Action Coalition and success in transforming nursing and improving patient care depends on your ability to secure independent funding.”

Achieving sustainability is a long-term process, which needs to take place over the life of a program. This webinar will provide some insights and specific strategies on how Action Coalitions can take the steps necessary to increase their funding capacity.

Action Coalitions have received grants or donations from more than **240** organizations and over **150** donations from individuals. To date, all funding collected by ACs totals **\$5,105,839**. This does not include the RWJF funds from APIN or SIP. Amounts raised by states range from **\$850 to \$1,595,820**.

Here are a few examples:



Getting funders to support your Action Coalition is critical to your success... The number one reason people will not donate to your Campaign is that they are never asked.

In **Michigan**, the Blue Cross Blue Shield of Michigan Foundation and the Community Foundation of Southeast Michigan each contributed \$25,000 to help the state win a SIP grant. Michigan will use the money to strengthen nursing education and foster interprofessional collaboration.

In **Connecticut**, the Annie E. Casey Foundation provided a \$75,000 matching grant to help the state win a State Implementation Program grant. Connecticut will use the money to develop new nursing education progression models that provide for seamless fast-track options to move nurses to the next educational level and to promote diversity within the nursing profession.

In **Rhode Island**, the Rhode Island Foundation and the Routhier Foundation provided a combined \$112,500 in matching funds to help Rhode Island win a State Implementation Program grant. Rhode Island received more than \$600,000 total in funding, including critical support from a \$247,363 Governor’s Workforce Board Partnership Grant to Stepping Up, a health care industry partner of the workforce board.

Rhode Island will use the funds to launch a groundbreaking, statewide clinical nurse residency and mentoring program to provide participating nurses with additional skills and experience. The program will be tailored to unemployed/underemployed and new nursing program graduates.

Getting funders to support your Action Coalition is critical to your success.

And although foundations are who everyone thinks of first, there are so many other sources of funding.

For example, the New Jersey Action coalition got their SIP matching dollars from all the Magnate hospitals in the state.

“After all, tying the ask to what matters most to hospitals – a well prepared nursing workforce-- makes sense,” said **Hassmiller**.

Robert Wood Johnson Foundation Grants:

The Robert Wood Johnson Foundation has developed several funding opportunities specifically for Action Coalitions. For SIP, 20 grants were awarded in February 2013 and **now** up to 10 more will be awarded up to \$150,000 each over two years to ACs to identify and implement up to two of their priority recommendations from the IOM report.

Grantees are required to raise matching funds as a condition of the grant. The Robert Wood Johnson Foundation will award two dollars for every one dollar secured by Action Coalitions up to the grant award limit of \$150,000. Applications are due June 4th. Current SIP and APIN grantees are not eligible to apply. You can go to www.campaignforaction.org/SIP for more information or watch the April 18 webinar at www.campaignforaction.org/webinars

Getting funders to support your Action Coalition is critical to your success, says **Hassmiller**.

Another Source of Funding:

On April 29, the Health Resources & Services Administration posted a new and very exciting source of upcoming funding. The Nurse Education, Practice, Quality and Retention - Veterans' Bachelor of Science in Nursing Program. Program funding will go to accredited schools of nursing to increase veterans' enrollment in and completion of baccalaureate nursing programs and to explore ways to award academic credit for prior military health care experience or training.

There is a June 7th Deadline. Visit www.grants.gov for more information on this opportunity.

The Need for Action Coalitions to Prepare for Fundraising:

Shillam detailed what ACs must do before they ask potential donors for money.

- ✓ The foundation of fundraising must begin with the Action Coalition defining a **clear mission** and **vision** for its work. This mission and vision must be **free of nurse-centric language**, and be a clear message that can be understood by a broad range of populations.
- ✓ All members of the AC must be able to clearly articulate this mission to outside audiences, key stakeholders, legislators, and those outside of healthcare to convey the importance of this work for improving the health of the population. For example, while attending a communications training at the Robert Wood Johnson Foundation, Shillam shared the preliminary mission statement of the California Action Coalition. The audience was instructed to raise their hands as soon as the speaker mentioned any terms they may be unfamiliar with or may not know the true meaning of the word or

phrase. “I said that we wanted to improve the health care delivery system, to which many hands went up in the air and the question was asked: “what exactly is a health care delivery system?” That was a powerful moment for me – we take so many things for granted when we share the enthusiasm of our work that may not be clearly understood by those outside of healthcare.”

- ✓ ACs should have a good idea of what their needs are before they ask. Creating an overall budget for the entire operating expenses for the work of the AC is important for several reasons. It helps the leadership team to understand the resources that truly are necessary for the work of the AC. Also, when opportunities arise unexpectedly, it can help with quickly identifying where needs and priorities for the AC may align with potential funding sources. Your immediate priorities may not be another organization’s priorities, but if they have a need that your AC can meet, then you should be prepared to make the case. Having a budget will help with knowing how you may be able to use those funds when they become available.
- ✓ The AC Development team should be a diverse group of people in healthcare but also outside of it. The team should develop the strategies realistic for the state and determine how will executive/leadership members contribute.
- ✓ Successful strategies in some states include funders’ roundtable meetings, building on existing relationships, membership dues and the use of on-line fundraisers.

Green, the co-lead of the Texas team, showed how the Texas AC prepared a budget. The Texas Team developed a two-year operating budget, \$1.34 million, which included funds for all these budget categories – operating, personnel, travel, communications and research/projects. Then they developed an overall fundraising goal for the Campaign – from 2014 to 2020. That figure is \$4.69 million or a \$5 million Campaign.

One of the critical decisions was to determine if the funds would live in perpetuity or if the Campaign would actually end in 2020. They elected not to have the funds live in perpetuity.

Green said in preparing a budget, ACs should think of the time and resources that have been contributed to date, and what a monetary amount can be applied to those contributions. Have you received communications or scheduling support from a university or nursing workforce center in your state? Have organizations hosted meetings, phone lines, or webinar capabilities for your AC?

“Funders want to fund successful projects, so put the work of your AC in the best possible light and show how you HAVE received funding, even if not directly as money but through those in-kind contributions.”

The Plan:

Fully prepared in your mission and your budget, ACs are ready to develop the plan for fundraising.

Shillam showed a pyramid structure that represents the concept of how successful efforts translate into donations. It shows that only about **10 percent** of donors contribute **60%** of the funds, whereas the largest pool of donors – 70 percent -- contribute about 20%. This shows the importance of identifying that 10% as efficiently as possible so that ACs can establish a strong relationship, develop mutually-beneficial goals and attempt to attain that 60% of funding.

Specific strategies for identifying that 10% include **personal face-to-face asks, phone calls, or letters**. The “cold-calling” approach or mass-distribution techniques like phone-a-thons, direct mailings or electronic e-mail blasts, or special events may be the most comfortable and less likely to feel as though you are “putting yourself out there”, but they are the **least effective strategies**.

Spitulnik showed how **Rhode Island** approached fundraising.

“Our size is an advantage because everybody knows everybody. It’s also something of a disadvantage in that there are limited sources of funding and everyone is going for the same money.”

Their approach was to use personal contacts to create a snowball effect. A basic assumption is that people are in leadership positions partially because of who they know, and that includes our Action Coalition co-leads.

They started by having the co-leads meet with Rhode Island’s AARP Director, who is an RN, a former state representative, and a former head of various state agencies. She was also a member of the Action Coalition Steering Committee.

“Our meeting with her resulted in a list of high-level people we should contact, as well as introductions directly to those people or to someone else who could get us to them. We did this on the assumption that they have money to give and are looking for new ways to spend it.”

Shillam said it is important to explore multiple strategies for funding and sustainability. Those organizations that are newly emerging, have little public awareness, and limited numbers of funders have a lower likelihood of maintaining sustainability than those with a specific problem area, high public appeal, and multiple funding partners.

Therefore, the work of Action Coalitions are well-positioned to have a high likelihood of sustainability, but some efforts specifically targeting some of these higher-likelihood areas are key to that success, she said.

Texas' Fundraising Plan:

The Texas AC working in partnership with their Executive Committee and Strategic Advisory Committee has developed very specific Fund Raising Campaign Tactics. They developed Case Statements (included one-pagers and elevator speeches). They created a "Ladder of Effectiveness" which supports and directs their solicitation techniques. They are prioritizing fundraising in the following categories and all Texas Team AC leaders are submitting names of potential donors to be solicited in the following ways:

- ✓ Personal face-to-face – a team of two AC leaders approaching key potential donors/foundations for large gifts. Again – names being submitted by many – but this "visiting team" will consist of Gregg Muenster (StAC leader) and an Exec. Committee leader such as Green.
- ✓ Personal letter (on personal stationery) with telephone follow up
- ✓ Personal Telephone call with letter of follow up
- ✓ Impersonal Letter (direct mail)
- ✓ Fund Raising Benefit (our J&J Gala)
- ✓ Social Media solicitation

Remember the number one reason people will not donate to your Campaign is that "they are not asked".

Green said their Texas fund raising strategist and Strategic Advisory Committee member – Gregg Muenster (US Bank and Trust Wealth Manager) had worked with the Texas AC Leadership Team to understand that as AC leaders they need to "set the pace" for giving and they agreed that ALL Texas AC leaders must support the Texas Fund Raising Campaign by "**Leadership Pledges**" and the need for 100% participation from our AC leadership. "Gregg stressed that it is difficult to "ask a donor for financial support if you haven't personally pledged financial support" to the AC."

A fundraising strategy adopted in Texas is to host a **Fund Raising Campaign Kick-Off Gala**. They approached Johnson and Johnson to host the Fund Raising Gala – and they agreed. This will be the **first** AC Gala. They are working to obtain pledges from two to three large donors – with gifts totaling at least \$500K - between now and February and those donors will be recognized/acknowledged at the J&J Gala. They will hopefully "set the pace" for others to give to the Fund Raising Campaign. The hope is that the Gala will raise between \$250K to \$500K just from the event (excluding the \$500K from donors who will be recognized at the gala).

They also have an Executive. Committee leader – Dr. Cole Edmonson – who is helping them devise a plan to reach out to younger generations via use of social media/networks such as: "Causes", "CrowdRise", "FirstGiving", "Givezooks".

The ASK:

The ask for your potential donors should be credible and realistic. Following the SMART formula, the ask should be specific, measurable, attainable, realistic and time bound. The AC should be able to articulate the uniqueness of the project, other sources of funding, and the goal of financial self-sufficiency.

Shillam said ACs have to make the case and should identify local, regional, and state resources, identify those already funding nursing and always look outside of healthcare, such as business leaders and insurance companies.

It is critical to do research before potential donors are approached. **Shillam** suggests ACs identify all the local foundations, their mission and if their mission can be aligned with the AC's work. Ask the leadership team to list their personal and professional relationships.

She recommends creating a template letter, for example to a funders' roundtable event, and to have only one person from the AC make arrangements and coordinate efforts. The thank you follow up letter shows appreciation for their attendance and shows the AC relationship to the Affordable Care Act. The ACs hold out the opportunity to work together on the ACA. The foundation's response will guide the AC's direct ask.

Shillam also said ACs should think outside of foundations and should explore big state-wide companies, learn about the make-up of the employees, the importance of maintaining good health for their employees and how their views can influence how health care is provided within the state.

The IOM's recommendations include: the need for more advanced education of registered nurses; nurses leading innovations in health care and being appointed to decision making bodies; all nurses practicing to the full extent of their education and training; a more diverse nursing workforce and faculty; and more interprofessional collaboration among nurses, physicians, and other members of the health care team in the educational and clinical environments.

For more information from the Center to Champion Nursing in America about this webinar, technical assistance or other questions related to the Future of Nursing, Campaign for Action contact Michael Pheulpin at MPheulpin@aarp.org or 202-434-3882 or Andrew Bianco at abianco@aarp.org

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