

A Case Study from Barlow Respiratory Hospital Foundation

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Recently, Barlow Respiratory Hospital Foundation conducted its first ever—and extremely successful—capital campaign to raise money to build a new hospital. Below is a summary of the steps it took to ensure success. For a more in-depth account of the planning and implementation of its employee campaign, along with its detailed “45-step” process, please visit www.ahp.org/members-only/journal.

A unique place

Nestled in a hilly area near downtown Los Angeles stands Barlow Respiratory Hospital, an impressive health care institution focused on weaning patients from ventilators and improving quality of life. For years, Barlow chugged along with minimal fund-raising efforts to sustain it. Expenses were covered by insurance and private pay. Grateful patients and families, over the years, gave unsolicited gifts that, combined with income from operations, eventually grew into an endowment of more than \$25 million. However, with the damage sustained in the 1994 Northridge earthquake and the mandates of CA SB 1953 (mandating all acute care hospitals

meet stringent seismic retrofitting or replacement standards), Barlow leaders knew they needed to undertake a major capital development program to build a new hospital.

The price tag was more than \$42 million for a new 80-bed hospital. FEMA would fund \$7.8 million. The Foundation vice president was asked to assist by funding \$5 million. The initial feasibility study by Netzel Associates recommended adopting a goal of \$3,750,000, including a planned giving segment. The strong feeling was that implementation of a planned giving program would provide long-term benefit to an institution already receiving unsolicited planned gifts. Almost immediately the first life estate prospect was identified and cultivated and ultimately, a generous gift was received.

A shaky beginning

Capital campaign organizational steps included board development: to grow the board and to help the board accept its responsibility as chief fiscal caretakers. Key administrators were solicited early in the campaign, and they supported the campaign generously.

The original plan called for the general employee campaign to begin 13 months into the process, however, the campaign faced several challenges that delayed this. Union organizers had aggressively pursued the small staff of 200+ at Barlow. With a union vote in the near future, the employee campaign was postponed indefinitely. The hospital was forced to spend scarce dollars on registry employees, attorney fees, etc., thus having to freeze salaries and hiring. Again the employee campaign was postponed.

At last, 18 months into the campaign, the decision was made to forge ahead with the employee campaign.

The goal

A minimal goal of \$125,000 was set. Much thought was given not only to the goal and structure of the employee campaign, but also to the campaigners themselves. Employee campaigners would need to be:

- Good leaders and/or team players
- Valued and respected by peers and administrators



- Wholeheartedly committed to the mission of the hospital and the capital effort
- Able to recruit others to assist
- Respected by the cross section of employees in varying position levels and departments

Recruiting advanced on schedule with only a few turndowns. What motivated busy employees to agree to be part of the fund-raising team? Clearly, their decision was based on:

- Who asked them to serve and the enthusiasm exhibited by the staff

- members doing the recruiting
- Their belief in the mission of the hospital
- Their enthusiasm for the building of a new hospital
- Their desire to make a difference
- The existence of a defined and limited timeline, with clear beginning and ending dates

The kick-off

The baseball-themed employee campaign kick-off was held at the Hospital Library, a beautiful historic building with a large seating area. Stan Hébert, the foundation board chairman, hosted the kick-off and presented an inspiring program featuring a new video about the new hospital and virtual tour. A brief refresher training on soliciting gifts was included in the program and employees received their campaign packets and their solicitation assignments.

Each team member had a goal of \$3,000.

Every employee making a gift was rewarded with a gift of their choice. Pledge cards

were made up for every employee and included a convenient payment plan for payroll deduction gifts. Campaigners had the opportunity to select their own prospects. The process was carefully monitored to avoid duplication.

Campaigners were encouraged to:

- Make their own gift first
- Start campaigning immediately
- Set appointments with prospects face to face
- Attend all report/progress meetings

Report meetings were held every two weeks and were 45 minutes in length. They included employee success stories and patient testimonials. A light meal was provided at each event and the baseball theme was maintained

throughout the campaign schedule. By the third meeting, it was clear the employees were having fun and were going to exceed the goal. A strong employee recognition program was in place, which consisted of everything from listing names of campaigners and donors, the gift program, and a donor wall in the new hospital.

Victory!

Eight weeks after the kick-off, a victory celebration was held at Dodger Stadium Dugout Club, hosted by the campaign General Chair Bob Graziano. In addition to inviting employees, all campaigners were invited, as well as the press, major donors and prospective donors. It was the perfect culmination of an event that performed well beyond expectations.

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made contributions of \$5,000 or more, eight made gifts above \$2,500, and 25 made gifts of \$1,000 and above.

Ninety-eight percent elected to make their contributions through payroll deduction, a key factor that fostered stretch giving.

The employee campaign was undoubtedly successful:

- \$220,917 was raised on a goal of \$125,000.
- Employee interest in and knowledge of the project increased dramatically.
- Employees rallied together for the overall good of the revered institution.
- Stretch giving occurred at all levels
- A pattern of participation and giving was established, paving the way for annual giving and future capital campaigns.

To read a more detailed account of Barlow Respiratory Hospital's successful employee campaign, complete with 45 "how-to" steps for success, please visit www.ahp.org/members-only/journal. 

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