



The Art of **Bold Asking**®

We elevate philanthropy by creating effective partnerships and building new skills that drive giving from transactional to transformational.

Vision Philanthropy is a comprehensive philanthropic consulting firm, specializing in health care philanthropy. Our art of **Bold Asking**® program is based on decades of deep experience, serving as development professionals and consultants in premier academic institutions, teaching hospitals and community hospital systems; we've been where you are now. We understand the unique challenges you face and the gratifying opportunities that lie ahead in generating support in the health care philanthropy landscape.

Our consulting team has worked closely with influential philanthropists and boards, innovative leaders, world-renowned faculty, and fundraising shops of all sizes. We've learned what works, what does not, and how to build engaged and effective teams. We share all this with our clients in leading, managing and advising high-performing philanthropy programs, tailoring each to meet your specific requirements and your unique culture.

"Susan's expertise in knowing how to tell a cause's story and understanding what makes donors tick helped us create the partnerships with donors we needed...Her insight and work with our Board of Overseers was critical to not only reaching but exceeding our campaign goals."

*-- Orrin Ingram, CEO, Ingram Industries and Chairman, Vanderbilt-Ingram Cancer Center Board of Overseers,
Nashville, TN*

Real Life Experience. **Practical Help**

Many potential donors care deeply about supporting health care, yet each year health care institutions struggle to meet their philanthropy goals for simple reasons: they fail to create a philanthropic culture, engage prospects in meaningful ways, and effectively invite new donors to participate in their noble cause. Simply, they fail to engage and **Ask Boldly!** The Bold Asking® program engages everyone in the basics of high performance philanthropy and comfortably shapes each team member's distinct, powerful and even joyful role in philanthropy.

The Art of **Bold Asking**®

The art of Bold Asking® program is based on VPG's 35+ years leading and advising health care philanthropy programs. We've helped raise over \$1 billion for leading healthcare institutions. Our coaching and training and training program is designed to build your health care team's comfort, confidence and effectiveness in engaging new donors, while elevating your philanthropic culture, building powerful partnerships and meaningful relationships, and creating transformational giving.

Our training program offers a suite of customized training, coaching, and learning experiences for:

Board Members
CEOs
Executive teams
Physicians
Caregivers
Philanthropy staff

Our customized and highly interactive program includes:

Retreats and workshops (3 hours to day-long)
Small group training
Structured one-on-one personalized coaching

"VPG's sage advice, insightful tips and fun and realistic role play has built our team's comfort and confidence from the first visit in the hospital to accelerating the evolution of our organization's culture of philanthropy. Their coaching and toolkits provide insightful advice and a strategic framework for our experienced fundraisers. From the Philanthropy Staff to the CEO, we have crafted consistent, effective Signature Language, and put our integrated program into action."

*Stephanie Truesdell, former Vice President, Philanthropy and Communications, Beth Israel Deaconess Hospital --
Milton, Boston, MA*

A coaching and training program designed for your entire health care team: **Boards, CEO's, Caregivers, and Philanthropy Staff.**

Here's how it works:

Assessment



VPG consultants interview your leaders and philanthropy team to understand your organization and its needs. We tailor a simple, 10-question online survey to your circumstances to assess your philanthropic culture and understand your team's comfort, experiences, and perceptions of philanthropy and fundraising.

We ask that all participants, from board members to executive leaders, caregivers, physicians, and the philanthropy team, complete our customized assessment. Based on those results, we design the best program for your team.

You may take VPG's **Bold Asking**[®] sample assessment surveys at no cost.

We will share tips based on your survey!

Culture of Philanthropy Survey:

<https://www.surveymonkey.com/r/TH6J53N>

Barriers to Creating a Powerful Partnership with Your CEO Survey:

<https://www.surveymonkey.com/r/TPF6MZ8>

Evaluate Board Readiness to be a Philanthropy Leader Survey:

<https://www.surveymonkey.com/r/T6J6HLB>

Workshops and Retreats



Bold Asking[®] workshops and retreats are interactive adult learning experiences designed for the entire team. For CEOs and the C-Suite, physicians and caregivers, or philanthropy staff, **Bold Asking**[®] workshops build deep relationships and powerful partnerships, provide tools to comfortably communicate the institution's vision and stories, develop meaningful dialogue with patients and families, and elevate your institution's philanthropic culture for transformative giving.

Workshops have been crafted to support and enhance capital, endowment and comprehensive campaigns and give your leaders and staff the tools they need to be successful.

Curated learning experiences and topics include:

- Principles of the psychology of giving: What neuroscience tells us about asking and giving
- The role of gratitude, happiness and meaningful experiences in philanthropy
- Small group breakout exercises
- Measuring your philanthropic culture: Steps to creating a culture of meaning and philanthropy
- Building partnerships with the team, from the CEO and board to staff
- Starting donor conversations: The Board, CEO and staff roles
- Creating your "Signature Language"
- Active listening: The "Power Questions"
- The "Three Perfect Questions"
- Toolkits, scripts, and role-playing

Retreats usually occur off-site from the organization over a full day, including lunch and breaks. They may be combined with board retreats. Workshops typically occur on-site at the organization and require a minimum of 3 hours. They may also be conducted in conjunction with a board retreat.

Small Group Training



Frequently, learning best occurs in small group settings. Bold Asking® training may be delivered through a combination of workshops and small group sessions that address specialized topics. A suite of curated small group training sessions are tailored to the unique circumstances and needs of your board, C-suite, physicians, caregivers, and philanthropy staff.

Curated topics include:

- *Designing powerful partnerships* that transform culture and result in new major gifts.
- *The Hospital Visit*: Making the visit, What it is. What it is not.
- *Discovery Visits*: A step by step process to getting to know your suspects and prospects.
- *What's your greatest challenge?* Steps to solving them.
- *Big Vision = Transformative Gifts*; Creating million dollar gifts and a new era of philanthropy with physician partners.
- *Donor conversations*
- *Partnering with your clinicians and caregivers*; Proven practices in building relationships, trust, confidence and engagement with the philanthropy team.
- *Toolkits for your Board*:
 - Defining your “Signature Language”
 - Telling your story and opening doors
 - Cultivation and “CEO Conversations”
- Small group breakouts and role-playing.

Personalized One-on-One Coaching



VPG consultants also work one-on-one with your team to optimize your results and build stronger partnerships. With our clients, we develop a customized plan with specific benchmarks and outcomes for coaching. VPG has extensive experience providing one-on-one coaching for hospital presidents and board members in consultation with philanthropy leaders.

We also provide one-on-one structured coaching for individual philanthropy staff whose performance will benefit from additional coaching. Structured coaching augments our workshops and small group training and helps ensure that optimum results are consistently achieved.

Contact us to learn more about personalized coaching!

"I cannot imagine embarking on this project without the guidance of Vision Philanthropy Group...We now have the tools and the language we need to craft successful conversations with our prospects and donors and I have the confidence I need to be a comfortable in helping to build relationships and support for our historic campaign." -Starling C. Evins, M.D., FACS, Chief Medical Officer, Williamson Medical Center

Health Care Organizations the VPG Team Has Served As Development Leaders or Consultants

American Cancer Society,
Mid-South Division, Nashville, TN

National Jewish Health
Denver, CO

Beth Israel Deaconess Hospital-Milton
Boston, MA

New England Baptist Hospital
Boston, MA

Burke Rehabilitation Hospital and
Research Institute, White Plains, NY

Ohio University Heritage College of
Osteopathic Medicine
Athens, OH

Case Western Reserve University
School of Medicine, Cleveland, OH

Progressive Health Center and
Swedish Hospital
Denver, CO

Centerstone Research Institute
Nashville, TN

St. Lo France Etats-Unis Memorial
St. Lo, France

Chilton Medical Center Foundation
Pompton Plains, NJ

The Ohio State University Medical Center
Columbus, OH

Craig Memorial Hospital
Craig, CO

University at Buffalo Jacobs School of Medicine
Buffalo, NY

Massachusetts Eye and Ear Infirmary
Teaching affiliate of Harvard Medical School
Boston, MA

Vanderbilt University School of Nursing
Vanderbilt-Ingram Cancer Center
Vanderbilt University Medical Center
Nashville, TN

McAlester Regional Health Center
McAlester, OK

Weill Cornell Medical College
NYC, NY

Memorial Sloan Kettering Cancer Center
NYC, NY

Williamson Medical Center Foundation
Franklin, TN

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