

## MEDICAL SOLUTIONS

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### **Medical Solutions**

Charitable hospitals and surgical programs that deliver life-changing medical care and the good news of God's love to children and families with treatable conditions.

#### **Situation:**

The organization had a strong existing major donor model but was in need of an acquisition and upgrade model.

#### **Response:**

Several members of the leadership team were familiar with the success of the Westfall model and so contacted us in 2009. We rolled out our signature major gift event model the very next year. Since then, we have hosted five major donor events and one mid-level donor weekend.

#### **Outcome:**

At the most recent event 45% of the attendees were new to the organization. Over the past five years, through the event model alone, Medical Solutions has received \$16 million in income with an overall expenditure of approximately \$2.5 million.

## BIBLE FOCUS

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### **Bible Focus**

A multi-national, faith based organization focused on faith based translation projects for minority language groups worldwide. The organization utilizes entrepreneurial approaches to the task and to fundraising.

#### **Situation:**

Bible Focus realized \$7.7 million in contribution income in 2007, over 75% of which was derived from major donors. The development department was fully staffed but, due to increased engagement goals and a limited donor file, wanted to deepen and broaden donor relationships while significantly increasing income to meet the opportunities at hand.

#### **Response:**

We implemented the Major Donor Event strategy in order to engage key stakeholders, build a sense of ambassadorship among donors, and expand the major donor base.

#### **Outcome:**

The first event was conducted in spring of 2008, realizing \$3 million in new income within the first three months. The strategy was implemented annually with the eighth event just completed in spring of 2014 yielding \$20.5 million in commitments. Again, over 75% of organizational income is attributed to major donor participation. From the 3rd event onward, 30-50% of the major donors were new to the organization. Additionally, 35-40% of total giving is connected to the events with a total \$50 million in contribution commitments attributed to the event strategy influence over the course of eight events in seven years.

## AID ORGANIZATION

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### **Heartfelt**

Holistic international aid focused in Honduras, Costa Rica and Nicaragua working with sustainable housing, clean water, food and clothing programs, micro-finance, community development, sports camps and faith-based programs for youth.

### **Situation:**

This \$800,000 per year organization had a very small major donor program and lacked an adequate acquisition model. It had a compelling service component, but the case for support needed significant work in order to be presented successfully as a group ask.

### **Response:**

We implemented the signature Westfall Group major donor event model with the first event in spring 2013 and the second in spring 2014.

### **Outcome:**

The organization realized \$2 million between the two events, representing a 3:1 ROI and significantly propelling organizational capacity beyond previous levels. The major donor program gained momentum with over 10 new major donors participating in each event. Numerous donors are engaged in asset-based giving discussions as a result, with one donor wanting to contribute several hundred thousand dollars from the sale of his golf course this year.

## MICRO-FINANCE

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### **Micro-Finance**

Microfinance loans, insurance and training empower 5+ million people working their way out of global poverty.

### **Situation:**

The organization had a fairly strong existing major donor program but lacked an acquisition model. In addition, the case for support needed some work in order to be presented successfully as a group ask.

### **Response:**

We rolled out the signature Westfall Group major donor event model with the first event in spring 2004. Over the next several years, Micro-Finance hosted seven major donor event weekends.

### **Outcome:**

By their third event in 2006, half of the attendees were brand new to Micro-Finance. Calculating only new funding (upgrade of current donor relationships, and brand new major donor prospects), Micro-Finance raised nearly \$34 million of new funding. This client's total expenditure over the course of seven events was approximately \$4 million.

Their CEO at the time commented that the donor weekend proved to be the best source of new donors Micro-Finance had ever seen.

## SOUTHWEST SEMINARY

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### **Southwest Seminary**

A small (less than 100 students) inter/multi-denominational seminary, located in the Southwest, seeking to raise its profile and level of outreach.

#### **Situation:**

The school previously hosted an annual banquet for key donors, the centerpiece of its major giving strategy, which raised only \$300,000-\$400,000 a year.

The seminary had a heavy debt load on its building, thus keeping it from a cherished goal: providing significant scholarship opportunities that would expand its base by recruiting more international students.

#### **Response:**

Westfall implemented its significant major donor weekend event model in March 2012, with 36 out of 43 attendees making a financial commitment.

#### **Outcome:**

The seminary raised \$6.7 million, a substantial sum that enabled it to significantly reduce its debt and create a scholarship fund for international students.

## CHRISTIAN COLLEGE

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### **Christian College**

An interdenominational Christian college in California offering 26 majors and instruction in everything from arts and science to religious studies and communications.

#### **Situation:**

The college had raised \$100 million toward its \$110 million capital campaign goal and sought a special, substantive way to provide capstone funding for the institution.

#### **Response:**

The college implemented The Westfall Group's signature weekend event in the spring of 2011, with a specific threefold emphasis on building improvements: for campus athletic facilities, an arts building and a new structure for its science department.

#### **Outcome:**

The institution raised \$3.6 million from just 24 donor families and has since successfully completed the campaign.

# STUDENT OUTREACH

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## Student Outreach

A faith-based ministry focused on proclamation of the Gospel for high-school and college aged youth. The organization has reached millions of youth in the U.S. and abroad in less than eight years' operation.

### Situation:

Student Outreach has a vision for reaching students worldwide. The message to students is compelling. However, the case for support was starting from the ground floor and needed significant help.

Student Outreach has a new development department serving a small core of major donors and needs to implement a strong case for support with a strong major donor strategy. The annual budget is approximately \$4,000,000. The implementation of their vision requires fast-paced contribution growth to meet their exponential growth on the ground.

### Response:

With a lead-time of only six months, we rolled out the Westfall Group major donor event model. This first event occurred at the Four Seasons, Troon, in Scottsdale AZ in the spring of 2014.

### Outcome:

Student Outreach realized nearly \$4,200,000 from the event with an ROI that exceeded 10:1. Further, a strong request was made to meet needs occurring only 2 weeks after the event and \$1.86 million were committed to that time frame – exceeding the unstated need of \$1.8 million the leadership hoped for by that date.

These results provide other insights:

Small Event – Large Results: 33 giving units attended with 27 responding. These were well-qualified donors and prospects. There was a significant spirit of generosity from many helping achieve a large goal from a relatively small group of individuals.

First Time Donor Conversion: The organization was surprised by the large number of first-time gifts, at levels of \$10,000; \$30,000; \$50,000; and \$100,000.

Significant “lifts” in giving: The organization realized well over 300% lifts for many existing donors described in some of the actual examples in the chart below.

| Prior Largest Gift by Donor | Increased Donor Levels at the Event |
|-----------------------------|-------------------------------------|
| \$2,000 →                   | \$30,000                            |
| \$5,000 →                   | \$40,000 - \$250,000                |
| \$10,000 →                  | \$50,000 - \$100,000                |
| \$15,000 →                  | \$50,000 - \$75,000                 |
| \$25,000 →                  | \$200,000                           |
| \$50,000 →                  | \$100,000                           |
| \$100,000 →                 | \$1,140,000                         |
| \$250,000 →                 | \$1,000,000                         |

### Notes on Planned Giving

Some organizations do not have a strong Planned Giving strategy, but it should be noted that we have several clients who can attribute several million dollars of planned/estate gift revenue to their major donor events. One higher education client considers \$40 million in planned gifts as resulting from their six events. Another multi-national faith-based client attributes \$26 million in planned/estate gifts to a single major donor event.