

## **SOUTHERN OREGON FRIENDS OF HOSPICE CASE STUDY**

*Capital Campaign Consultant Engagement with Casey Woodard Consulting.*

### **SITUATION:**

In 2015, the *Southern Oregon Friends of Hospice* embarked on a capital funding campaign to raise \$4 million to build a 12-bed residential hospice facility in Southern Oregon known as Hospice Holmes Parks House. With a \$5,000 Technical Assistance Grant they received through *The Ford Family Foundation*, the organization hired Casey Woodard as a Capital Campaign Consultant to assist with their fundraising efforts.

### **ENGAGEMENT:**

According to Susan Hearn, Executive Director, Casey Woodard played a pivotal role in helping the organization achieve optimal outcomes in their pursuit of creating capital campaign to raise the necessary funds and laying foundation for sustainable future for the proposed hospice.

These activities included:

- Developing a clear, concise, and well-supported Case for Support statement for donors to back the hospice, specifying a compelling need, timeline, budget, project description, letters of support, business plan and support-to-date information.
- Identifying key personnel and roles for project furtherance. Casey provided assistance with recruiting an FTE Development Coordinator, Capital Campaign Chair, and Campaign Consultant. For volunteers, Woodward helped identify and recruit representatives from stakeholder groups to participate in the fundraising effort and outreach.
- Providing training for all board and campaign cabinet members to learn how to cultivate donors based on their specific motivators and create asking opportunities based on proper research and interest of donors.
- Offering written examples of effective campaign materials, as well as a policy and procedure manual for managing a capital campaign rollout and launch. Ongoing in-person and over-the-phone mentoring and training throughout the campaign development phase for key individuals and groups.
- Assisting the Southern Oregon Friends of Hospice to create a more accurate and clear pro-forma budget, while also providing insights and valuable feedback on operational budgeting.

## **RESULTS:**

As of November 30, 2016, the Southern Oregon Friends of Hospice has raised \$1,603,786 in donations, grants and pledges, which represents more 40 percent of their \$4 million goal.

Moreover, the organization has receive grants and funding from the Oregon Community Foundation, Carpenter Foundation, Carrico Family Foundation, West Family Foundation, Autzen Foundation, Naumes Foundation, Jerry & Jeanne Taylor Family Foundation and Asante Health System.

Construction began in March 2017. The Holmes Park House for Hospice is scheduled to open in early 2018.

*“Our success with this project began with Casey Woodard's professional advice and confidence building and support...Casey gave us the tools, confidence and determination to proceed with this worthy project. The opportunity to purchase and create this hospice residence from the iconic Holmes Park House would not have been possible without the campaign guidance and know-how imparted by Casey Woodard and the funding that the Ford Family Foundation provided with his technical assistance grant in July, 2015.”*

Susan Hearn, Executive Director

**For more information on Casey Woodard Consulting, visit [www.cwc-llc.com](http://www.cwc-llc.com) or call 541-941-3573.**