



CASE STUDY

BWF and Massachusetts General Hospital

A VALUED PARTNERSHIP FORGED OVER TIME

Massachusetts General Hospital (Mass General) is constantly optimizing their fundraising team and resources so the organization can continue to do amazing things. The key questions they ask to inform direction have evolved over time, as have their data-related needs. Today, the team takes a data-first approach in all decision making. Since 2010, their strategic counsel has been provided by BWF, who has served as Mass General's analytics team and trusted partner.

BWF's partnership with Mass General is built around managed services in data analytics, allowing Mass General to utilize industry expertise at a lower total investment than onboarding new staff members. This also gives them the ability to focus on their most critical analytics projects on an as-needed basis. By utilizing BWF's managed services, Mass General receives direct access to BWF's agile data experts (as well as to the firm's deep bench of experts, as needed). With BWF's robust organizational knowledge, every project Mass General and BWF identify is used to maximize potential and increase capacity.

When Katie Macrina joined the team in August 2017 as senior director, prospect management and research, BWF



"I highly
recommend
BWF because
they are an
industry
leader that

provides customized
solutions to meet our
business needs."

—**KATIE MACRINA,
MANAGING DIRECTOR,
PROSPECT
MANAGEMENT AND
RESEARCH,
MASSACHUSETTS
GENERAL HOSPITAL**



Massachusetts General Hospital, the third-oldest general hospital in the United States, is the original and largest teaching hospital of Harvard Medical School. Now the largest hospital-based research program in the United States—with over \$1 billion in research operations, including approximately 1,200 clinical trials occurring, on average—Mass General is an industry leader in medical research and delivers committed, world-class quality care to each and every one of its patients.

Mass General is consistently ranked as a top hospital in the nation, providing healthcare across multiple disciplines including cancer, neurosciences, heart disease, primary care, orthopedics, transplantation, trauma care, and more. Though widely acclaimed in the healthcare field, Mass General is constantly looking to push new edges of possibility and further its impact both locally and globally.

had been working on annual custom predictive modeling, program assessments, and fundraiser performance analytics.

In addition, the counting period for the campaign began shortly after Macrina came on board. Given that existing relationships were strong between Mass General and BWF, coupled with how warmly she was welcomed as a new team member, she knew the partnership with BWF would continue.

Identifying Emerging Needs

Over the years-long relationship, the questions Mass General has asked of its data have evolved, from one-off custom analyses using data to answer specific questions to deploying long-range forecasts and pipeline reviews to inform goal setting and programmatic growth plans. Areas of inquiry today are broader and more strategic, designed to use data to inform decision making and achieve goals.

Macrina quickly identified an opportunity to further expand the relationship to help address additional needs. In particular, Macrina wanted to dig deeper into the annual fund and overall share of philanthropic wallet and examine if money was being left on the table through adherence to current policies around gift acceptance. Managed services proved to be the right solution to tackle these and other emerging needs identified by her colleagues. For instance, frontline fundraisers expressed a need for analyzing clinical volume to provide a data-driven guideline for staffing per clinical “beat” to maximize potential, along with variability in the quality of leads from certain sources.

In December 2017, BWF reviewed several projects recently completed for Mass General, which covered predictive models (principal and major giving, planned giving, the MGH Fund, restricted giving, etc.), insight analysis, performance activity and metrics analysis, grateful patient engagement scores, prospect assignment and portfolio management, benchmarking, and lead source analysis, to name a few.

During this review, key accomplishments of the models were highlighted, such as a \$156M increase in total giving since the predictive models’ creation as well as increased

efficiency in principal and major gift identification. While these results were promising, additional growth opportunities were identified. BWF provided a seven-year projection analysis and supporting production scenarios (i.e., campaign forecasting) to provide Mass General with the information necessary to make informed, strategic decisions.

According to Macrina, "I cannot overstate the importance of the foundation of data we've built and enhanced through our partnership with BWF. We are currently holding portfolio reviews, and a key component to these meetings is the actionable data we are able to provide through the modeling scores, development connection score, and the patient connection score. The multifaceted views we can now provide to gift officers is invaluable."

Assessing the Impact of the Pandemic on Campaign Fundraising

Barely halfway through a multi-billion-dollar campaign, the pandemic's onset caused Mass General to consider the potential impact on its development program and its position within the ever-evolving COVID-19 landscape. Mass General once again turned to BWF to examine production, highlight unrealized bright spots in the constituent pool, and run "worst case" fundraising impact and growth potential scenarios.

Robust forecasting models and simulations were run to examine the impact of various business models. Extensive macroeconomic research into the prior campaign during the 2009 recession provided context and perspectives on medical and economic recovery. "Because this effort applied industry data and our historical performance," noted Macrina, now managing director, prospect management and research, "we received the information to make data-driven decisions."

The in-depth assessment of the current and future state of philanthropic production identified both bright and blind

"For me, it was appealing to partner with BWF because of the brain trust they provide. The firm's range of services is comprehensive, and anytime we ask a question, they have a colleague who is an expert."

**—KATIE MACRINA,
MANAGING DIRECTOR,
PROSPECT MANAGEMENT
AND RESEARCH,
MASSACHUSETTS GENERAL
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Data-Driven Insights, Real Change

- Identified three key pathways to doubling a fundraising goal
- Isolated the top 1% to 2.5% pipeline prospects annually for key strategic fundraising priorities
- Assisted in right-sizing gift officer fundraising metrics by unit and role
- Simulated potential outcomes for expanding direct marketing base population



spots and options for consideration. The head of development used the analysis to inform the fundraising committee and the board about the pandemic's impact on the campaign. Moreover, the case was made for hiring additional staff in targeted areas, reviewing the business model, and enhancing major gift operations.

Helping Mass General See the Big Picture

Working with one firm over several years has provided Mass General with an important level of consistency. Not only is it a time saver (negating the time and resources it takes to get another firm up to speed), but the close collaboration between the organizations expedites the transfer of data.

Throughout their years-long partnership, Mass General and BWF have grown together, drawing from the learnings of past projects to identify future goals and inform decision making. Mass General enjoys tremendous success today because of its dedication to data-informed strategy. As Macrina explains, "The ability to make data-driven decisions is so important. Having the data but also being able to overlay the human component and the anecdotal allows us to make the most effective business decisions. BWF continues to provide that, and we are thrilled with the outcome. They are thoughtful, creative partners who we now view more as colleagues who are equally invested in our mission and success." ■

ABOUT BWF

BWF is an international fundraising consulting and services company headquartered in North America. As both experts in complex philanthropy and the leading innovator in the field, we bring both a global perspective and local know-how, providing deep cross-sector strategic and tactical solutions to advance our clients fundraising abilities. It's why clients turn to us as their trusted partner, expanding their knowledge and abilities through our panoramic view of philanthropy. Not only do we stimulate the industry through thought leadership, but we are an incubator of multidisciplinary "next practices," always testing new ideas and exploring innovative ways of doing things.

For over 40 years, nonprofits throughout the United States and across the globe have turned to BWF to empower philanthropy for their organizations. We're ready to do the same for you. **Contact us today at info@bwf.com or visit bwf.com.**