

Hospital Foundation Fundraising

“Best Practices” Checklist

A collaborative audit of three major hospitals¹ revealed the following ‘best practices’ for successful foundation/fundraising programs. Whether you have an established fundraising program or are interested in launching one, you will find these “best practices” useful.

On a scale of 1 to 5, with 5 being the highest rating, rate your fundraising efforts using the following ‘best practices’:

1 Managing Relations with Hospital Administration

- ☐ Fundraising priorities emerge from hospital strategic planning.
- ☐ The hospital CEO and leadership team are supportive of the foundation.
- ☐ Communication efforts are coordinated between the hospital and foundation.
- ☐ Investment policies of hospital and foundation work together.

2 Developing the Case for Support

- ☐ A written case statement is prepared for each fundraising project.
- ☐ Both volunteer and staff input is utilized in formulating the case.
- ☐ A solid case exists for unrestricted gifts to the Foundation.

3 Prospect Research

- ☐ One person is assigned primary responsibility for prospect research.
- ☐ Summaries of donor contacts are inputted into donor records as they occur.
- ☐ Rating sessions are conducted with volunteers to obtain prospect information.
- ☐ The resources provided by the Internet for prospect research are understood and utilized.
- ☐ Data screening services are explored to provide demographic and wealth screening information on prospects.
- ☐ Other research sources are utilized.

4 Identification and Solicitation of Grateful Patients/Families

- ☐ Grateful patient/family solicitation complies with HIPAA requirements.
- ☐ There is a systemized approach to the identification of prospects that includes the following:
 - ☐ Visits of Patients/donors in the hospital
 - ☐ Direct mail
 - ☐ Physician referral
 - ☐ Nurse referral
- ☐ There is a systemized approach to cultivation activities for prospects that includes the following:
 - ☐ Tours

¹ These “Best Practices” for hospital fundraising are the result of a collaborative fundraising study conducted by the development programs for three hospitals in Kansas City, Missouri (August through November 2001). The three hospitals participating in the study were Children's Mercy Hospital, Saint Luke's Hospital of Kansas City, and Truman Medical Center. William J. Moran served as facilitator.

- ☐ Social and informative gatherings
- ☐ Educational events on health topics
- ☐ Solicitations include giving opportunities to “honor” favorite physicians and nurses
- ☐ Solicitations include giving opportunities to “memorialize” loved ones (both deceased and living)

5 Solicitation of Physicians

- ☐ Fundraising is directed to specific areas that appeal to physician self-interests (ex., individual departmental needs, medical education and research, etc.)
- ☐ Qualifying physicians as prospects include the following groups:
 - ☐ Physicians as they come on staff
 - ☐ Existing primary staff physicians
 - ☐ Retired physicians with a history with the hospital
- ☐ There are ongoing cultivation activities for physician prospects.
- ☐ Physicians are involved on the Board, in committees and other volunteer activities.
- ☐ Life insurance is considered as a giving tool.

6 Solicitation of Hospital Employees

- ☐ An employee giving drive is conducted annually.
- ☐ An employee giving committee is formed from different departments.
- ☐ Payroll deduction is used as the primary avenue for giving.
- ☐ Different giving options are provided that appeal to employee interests.
- ☐ Employee giving uses premiums such as T-shirts etc. to encourage participation.
- ☐ Solicitation makes use of employee events to highlight giving opportunities.
- ☐ New employees are educated about the foundation at employee orientation.
- ☐ Employees are recognized by listing annual donors on a board in the hospital and through other recognition efforts.
- ☐ Other systemized cultivation activities exist for employees.

7 Annual Campaigns

- ☐ A strong mail program for new donor acquisition is in place.
 - ☐ Grateful patients are solicited regularly.
 - ☐ Segmented mailings are sent out regularly to qualified prospects.
- ☐ An annual calendar and timeline is used to coordinate solicitation activity.
- ☐ A “top forty” prospect list is used for moves management and solicitation purposes.

8 Corporate/Foundation

- ☐ A systemized approach is used to research corporate/foundation prospects.
- ☐ Sponsorships of events are used to garner corporate support.
- ☐ CEO's are involved on the Board and other leadership roles.
- ☐ “Behind-the-scenes” and “shadow-the-doctor” are used to cultivate CEO's and funder representatives.
- ☐ Reports back to funders on use of funding are regular and timely.
- ☐ Volunteer linkages are used when appropriate to support grant requests.

9 Planned Giving

- ☐ A systemized approach is in place to identify and solicit planned giving prospects.

- ☐ A planned gift committee is in place and active.
- ☐ Planned giving brochures and other materials are being used effectively.
- ☐ A variety of planned gift vehicles are marketed with an emphasis on bequests.
- ☐ Marketing efforts include the following:
 - ☐ One on one visits
 - ☐ Targeted mailings with follow up
 - ☐ Regular articles and messages in ongoing organizational publications and on reply envelopes etc.
 - ☐ Seminars
 - ☐ Referrals from allied professionals
 - ☐ Website planned giving resources
- ☐ Goals for planned gifts are set and reviewed annually.

10 Capital Campaign

- ☐ Capital campaigns are conducted at least every five years.
- ☐ The case for the campaign is built from hospital strategic planning.
- ☐ The case for the campaign is also based upon donor interests.
- ☐ Board and other volunteer involvement is sought early in the campaign planning process.
- ☐ Strong campaign leadership is enlisted.
- ☐ The campaign goal is a “stretch” but doable.

11 Donor Recognition & Acknowledgment

- ☐ There are written procedures for acknowledging all gifts.
- ☐ Plans/procedures call for appreciation to be expressed in a manner appropriate to the size of the gift.
- ☐ Gifts are acknowledged within 48 hours of receipt.
- ☐ Appreciation for gifts is expressed in the most personalized manner possible.
- ☐ Recognition includes the following:
 - ☐ Letters from Board members and other volunteers
 - ☐ Letters from donor physicians
 - ☐ Articles and listings in written publications
 - ☐ Telephone calls for gifts over a certain amount (ex., \$500)
 - ☐ Small group appreciation lunches
 - ☐ Follow up reports on use of contributions
 - ☐ Tours to show the results of generosity
 - ☐ Plaques
 - ☐ Other

12 Database Management

- ☐ Dedicated fundraising database software has been installed.
- ☐ A data management policy is in place to establish consistent policies for entering/managing data.
- ☐ An employee is in place who is a competent specialist in data management.
- ☐ Training opportunities exist for updating database skills as new software is introduced.

13 Endowment Investments

- ☐ Investment policies are in place.

- ☐ An appropriate Board committee oversees investments.
- ☐ Periodic reports are made by investment managers.
- ☐ A written disbursement policy is in place.

SUMMARY

This checklist provide a starting point for hospitals seeking to improve their foundation/fundraising programs. For those hospitals interested in further information, a good place to start is the website for the Association of Healthcare Philanthropy (ahp.org).

Bill Moran
The Moran Company
“We find Great Hospital Fundraising Staff”