

AVAP Conference 2016

Grateful Client Programs: From Human Medicine



Bill Littlejohn, CEO
Sharp HealthCare Foundation
San Diego, California



Remember
the
Mission
@ cultural crossroads

33 Years In Philanthropy – 3 Employers Based in California – Yet in more than 30 states and countries

- American Cancer Society – 9 Years
- The Greenwood Company – 10 Years
 - 40 Projects including Oakland Zoo, San Diego Humane Society
- Sharp HealthCare Foundation – 14 Years
 - CEO and Senior Vice President





**Established Through
Philanthropy**



**3,000 Physicians;
Two Affiliated
Medical Groups**

SHARP



**Largest Healthcare Provider
in San Diego (29% Market Share)**



18,000 Employees



**Four Acute Care,
Three Specialty
Hospitals**



**1,000,000 Individuals
Impacted Each Year**



**CORONADO HOSPITAL
FOUNDATION**

SHARP HealthCare
Foundation

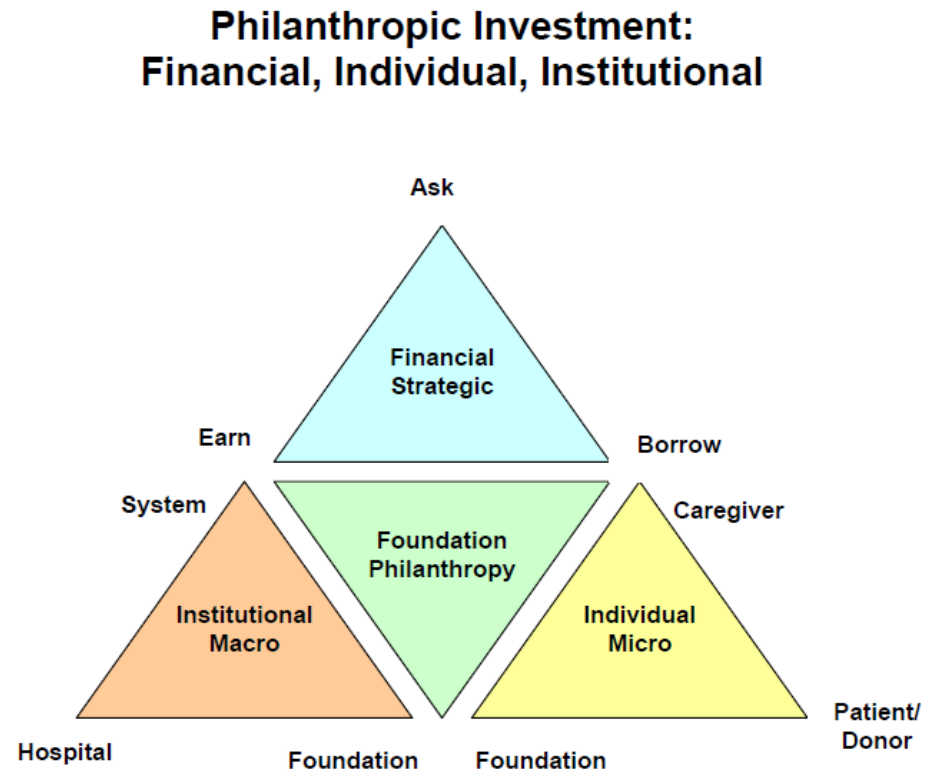
**GROSSMONT HOSPITAL
FOUNDATION**

**Three Philanthropic Foundations -- Generating \$20 million + in
Annual Revenues**



Strategic Health Care Philanthropy – Three Roles

- Philanthropy as a Financial Investment – Combined with Earnings and Borrowing
- Connecting Caregivers with Patients
- Sharing the Organization Vision



Long Term Sustainability the Key to Health Care Philanthropy



PHILANTHROPY LEADERSHIP COUNCIL
THE ADVISORY BOARD COMPANY

The Sustainable Fundraising Enterprise *Introducing the Council's Multimedia Playbook for Promoting More Reliable Returns*

- Laying the Groundwork for Future Growth
- Crafting a Retention Plan for Top Revenue Generators
- Investing in Smart Staff Growth



© 2011 The Advisory Board Company

Elements of A Community Hospital-Based Patient-Focused Program

- A strategic approach
- Ally (physicians/nurses/leadership) engaged in all aspects including Board service, champions and willing to refer
- A detailed process to identify, visit and follow-up with patients in both an inpatient and outpatient setting
- A VIP or Friend of the Foundation program
- Full alignment with IT, Medical Records, Legal, and Compliance
- Direct response including direct mail and e-mail
- A caregiver recognition program
- Managing all data associated with the program and performance reporting; full documentation of the program including policies and procedures
- Patient storytelling in messaging, Board meetings, stewardship activities



Sharp HealthCare's "Model" Program

- Nearly \$250 million raised and more than \$190 million distributed since the launch of *The Sharp Experience*
- 40,000 Guardian Angel recognitions
- More than \$1 million in online gifts
- Nearly 500 physicians engaged in philanthropy as donors, champions, Board and committee members; referring patients, presenting
- More than 500,000 solicitations through both direct mail and e-philanthropy to patients
- Patient storytelling at every Foundation Board meeting and integrated in The Sharp Experience
- Extensive Drs. Day program



JANUARY/FEBRUARY 2012 Vol. 9// Issue 1

experience

A MAGAZINE FOR THE STAFF, PHYSICIANS AND VOLUNTEERS OF SHARP HEALTHCARE

SHARP

the healing
power of
philanthropy



MAMA BEAR OF THE ER PAGE 8

"PAVE THE WAY" CAMPAIGN PAGE 9

SHARP LENDS A HAND PAGE 12

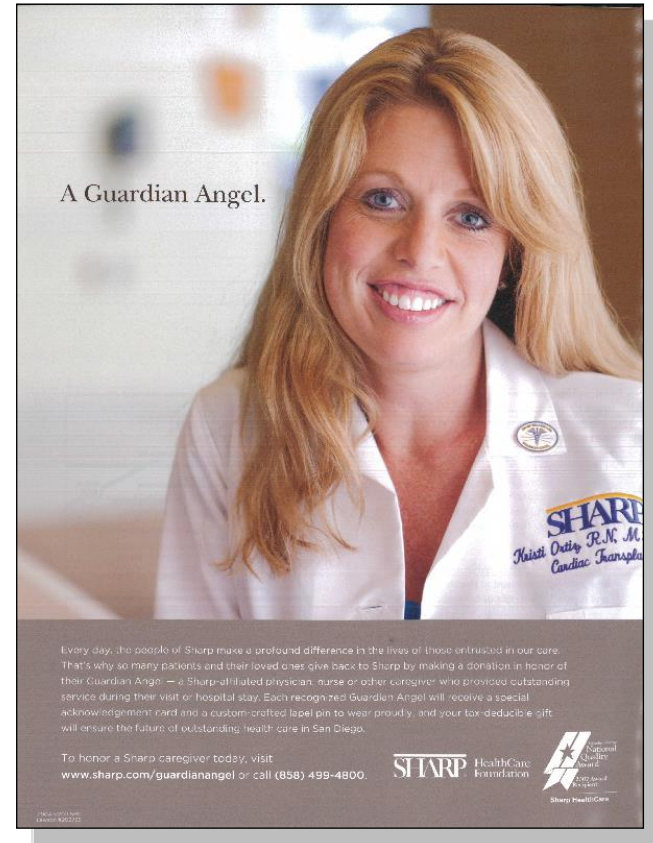
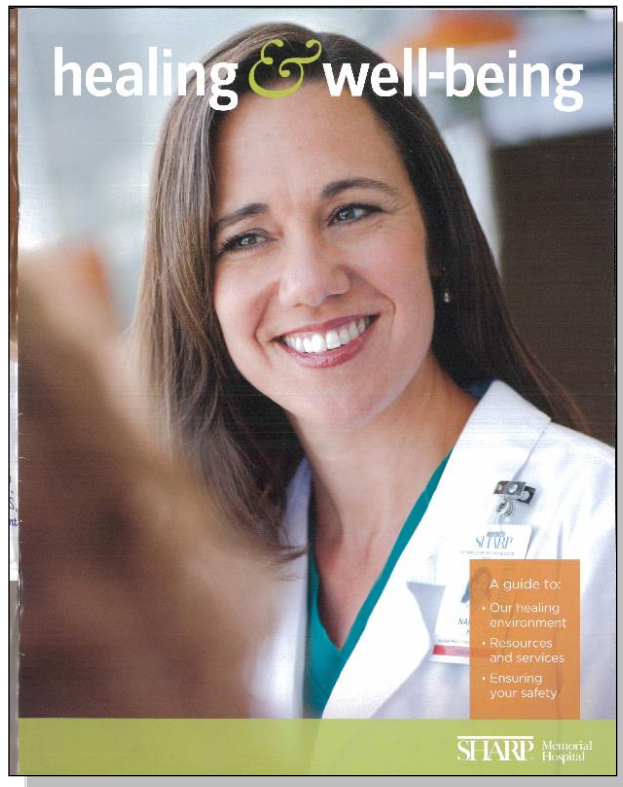
PLUS: PHYSICIANS AND PATIENTS SUPPORT
SHARP HOSPITALS, SATURDAY WITH SANTA,
SHARP'S FELLOWSHIP PROGRAM AND MORE

SHARP

An Institutional Culture of Philanthropy



A Culture of Collaboration – Caring and Giving

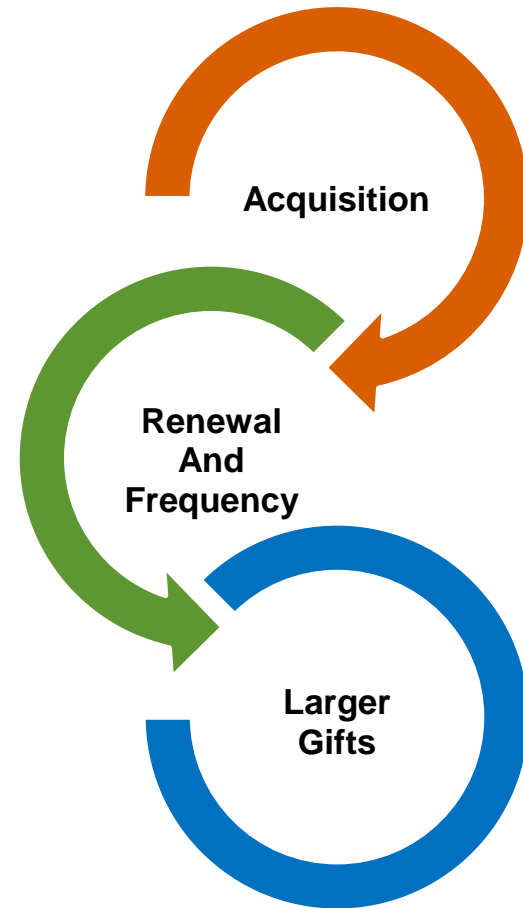


The Sharp Patient Guide in Every Room: The Back Cover Promoting An Opportunity to Give in Honor of a Caregiver – The Guardian Angel Program

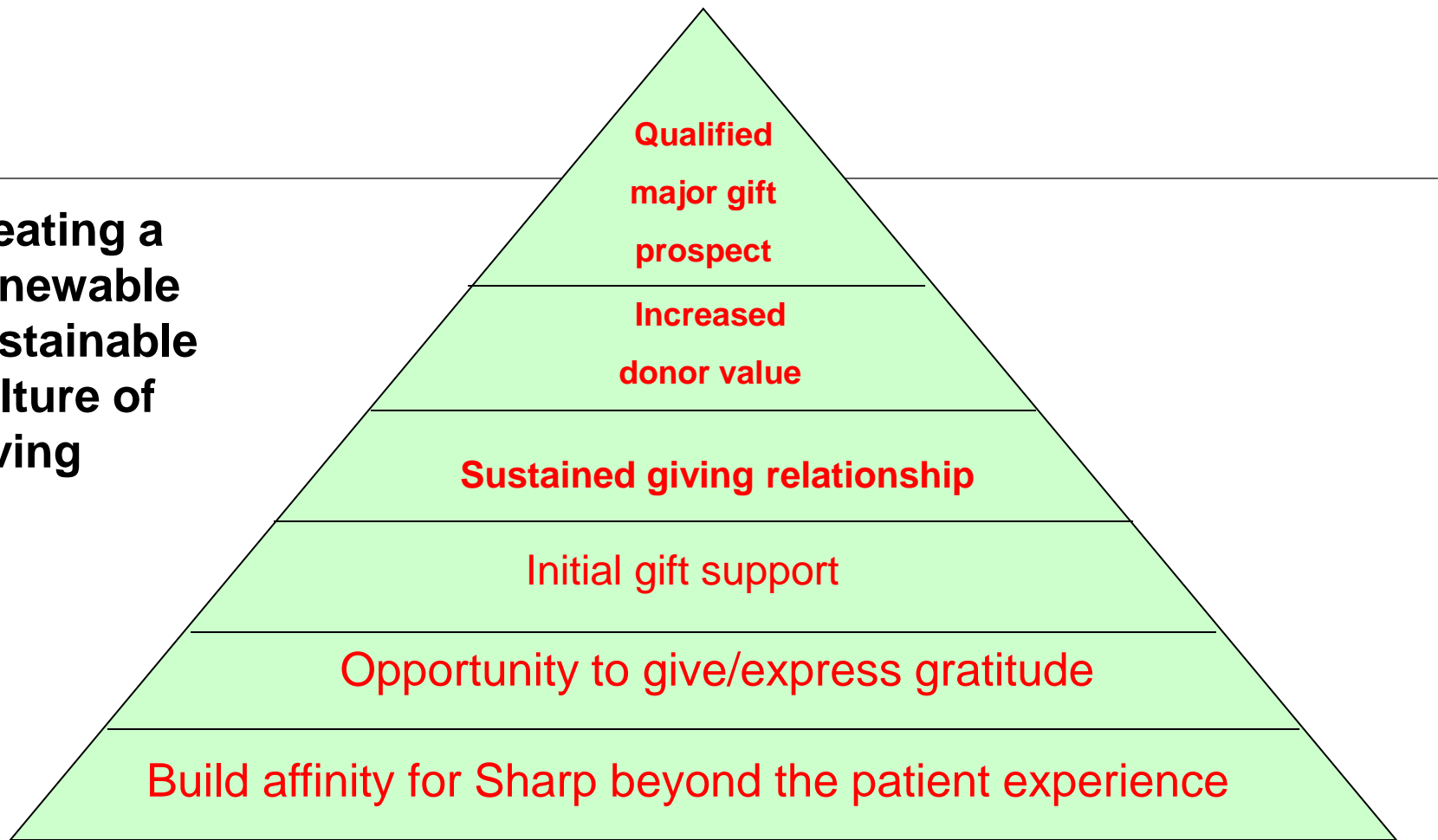


The Three Fundamental Forces of Fundraising

- Acquire new donors
- Have existing donors make additional and/or more frequent gifts
- Have both new or existing donors make larger gifts (give more than previous new donors or their own previous gift)



**Creating a
Renewable
Sustainable
Culture of
Giving**



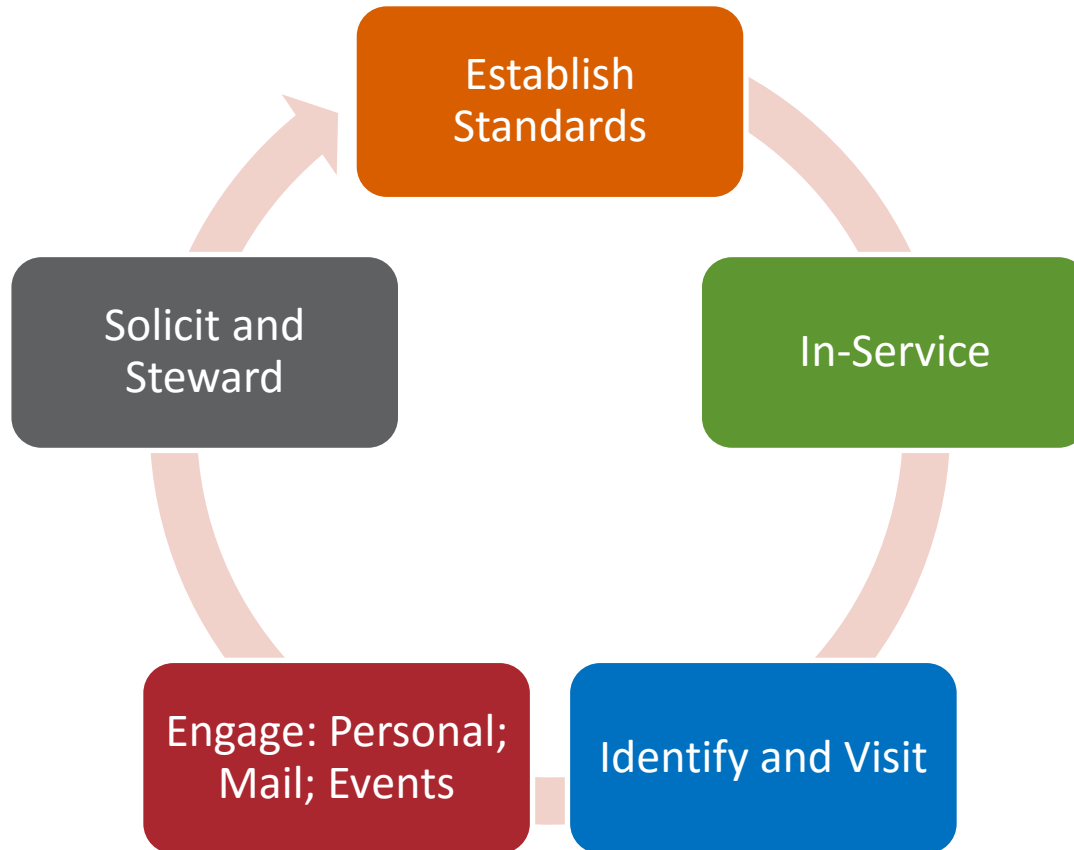
Sharp HealthCare foundations should inspire feelings of affinity in its patients/friends, foster a philanthropic culture and instill a progressively loyal and generous giving habit



We All Have the Same Jobs: It's How We Allocate our Time



The Cycle of Patient Focus



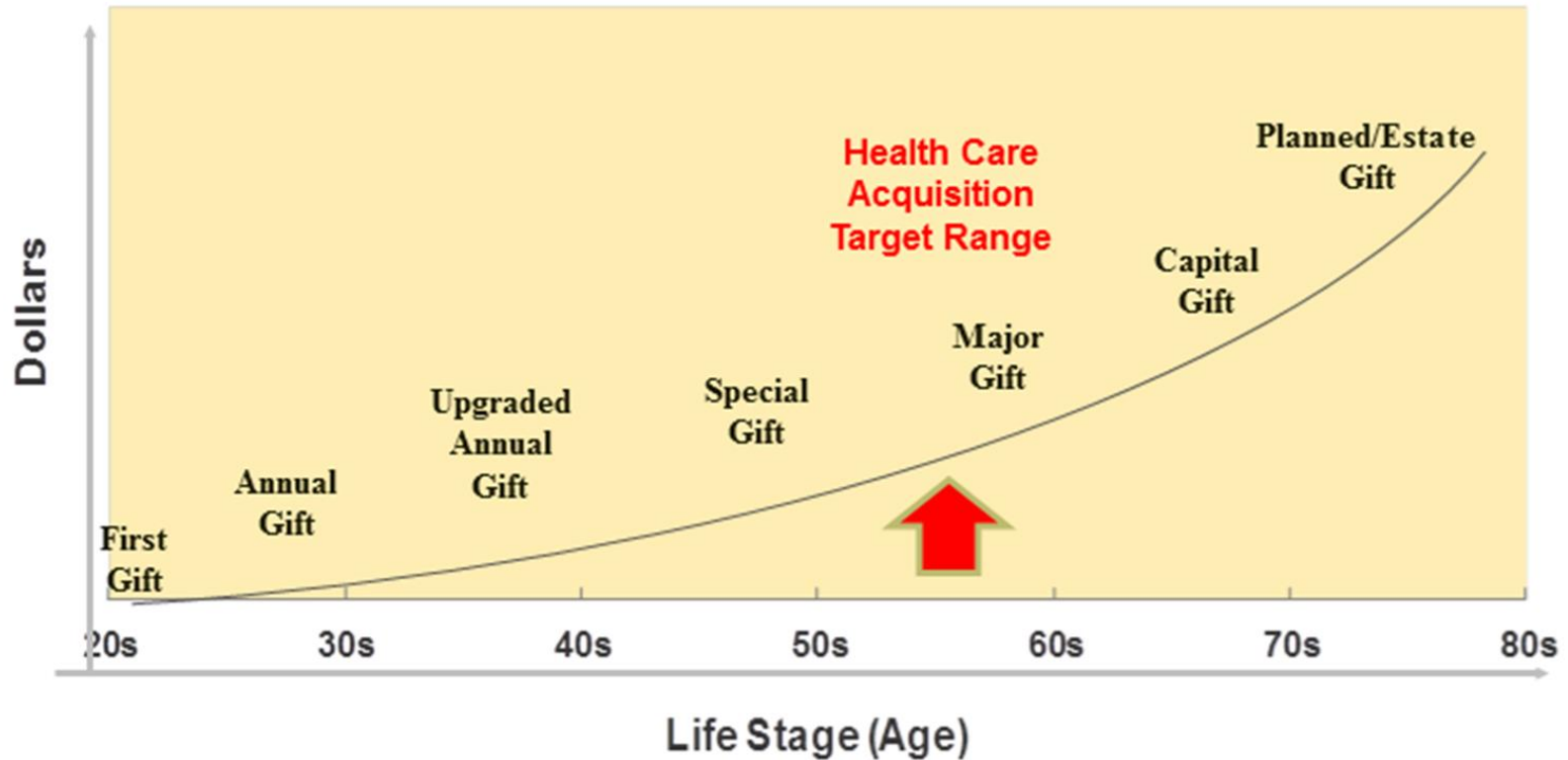
The Sharp Standards of Practice in Philanthropy

- Process and procedure to identify donors and prospects in the hospital
- Process to visit, note and follow-up with patients
- Process to convert patients to donors within a given period of time
- Communication standards for the number of touch points for donors and or prospects during a given period of time
- Database standards for recording fundraising activity
- **Performance standards for the major gift process**
- Standards for research
- Reporting standards
- *Standards for Achievement*



The Continuous Giving Model Challenge

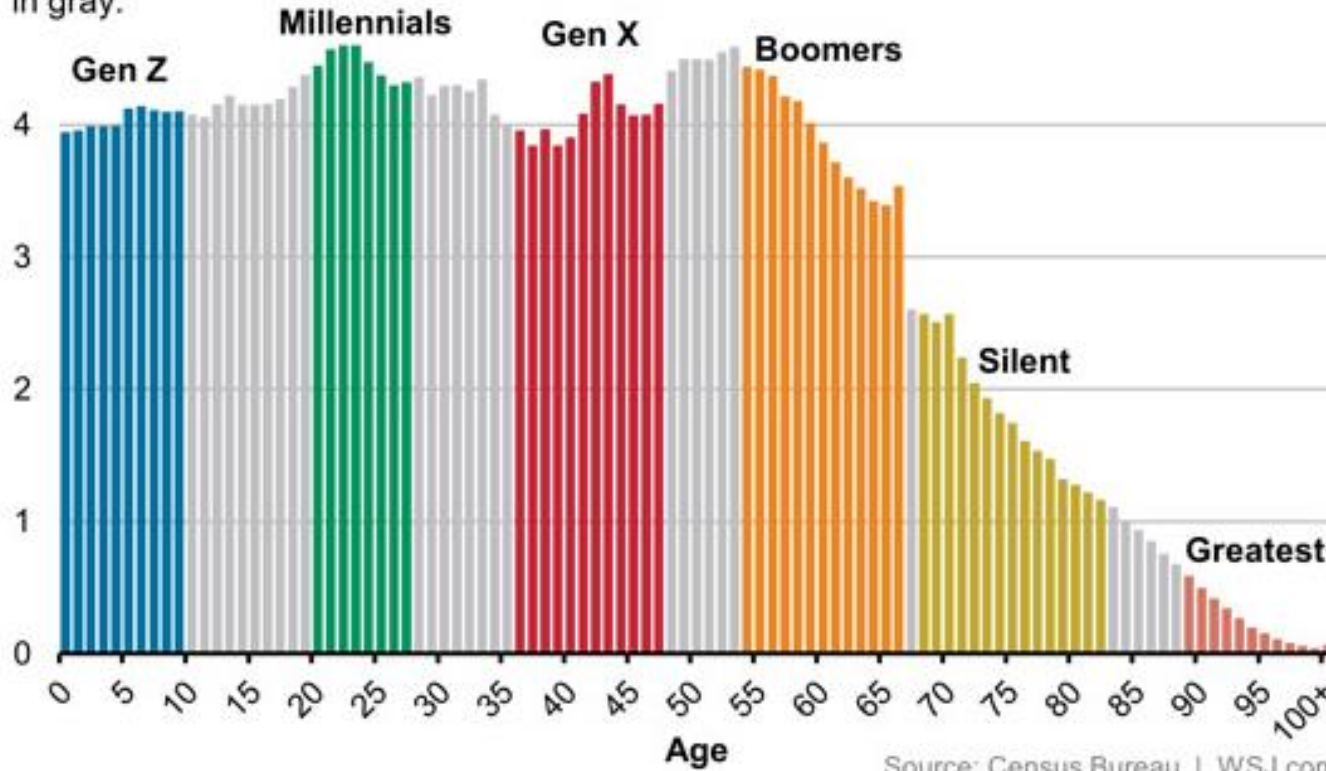
Acquisition Begins Later in the Health Care Dynamic



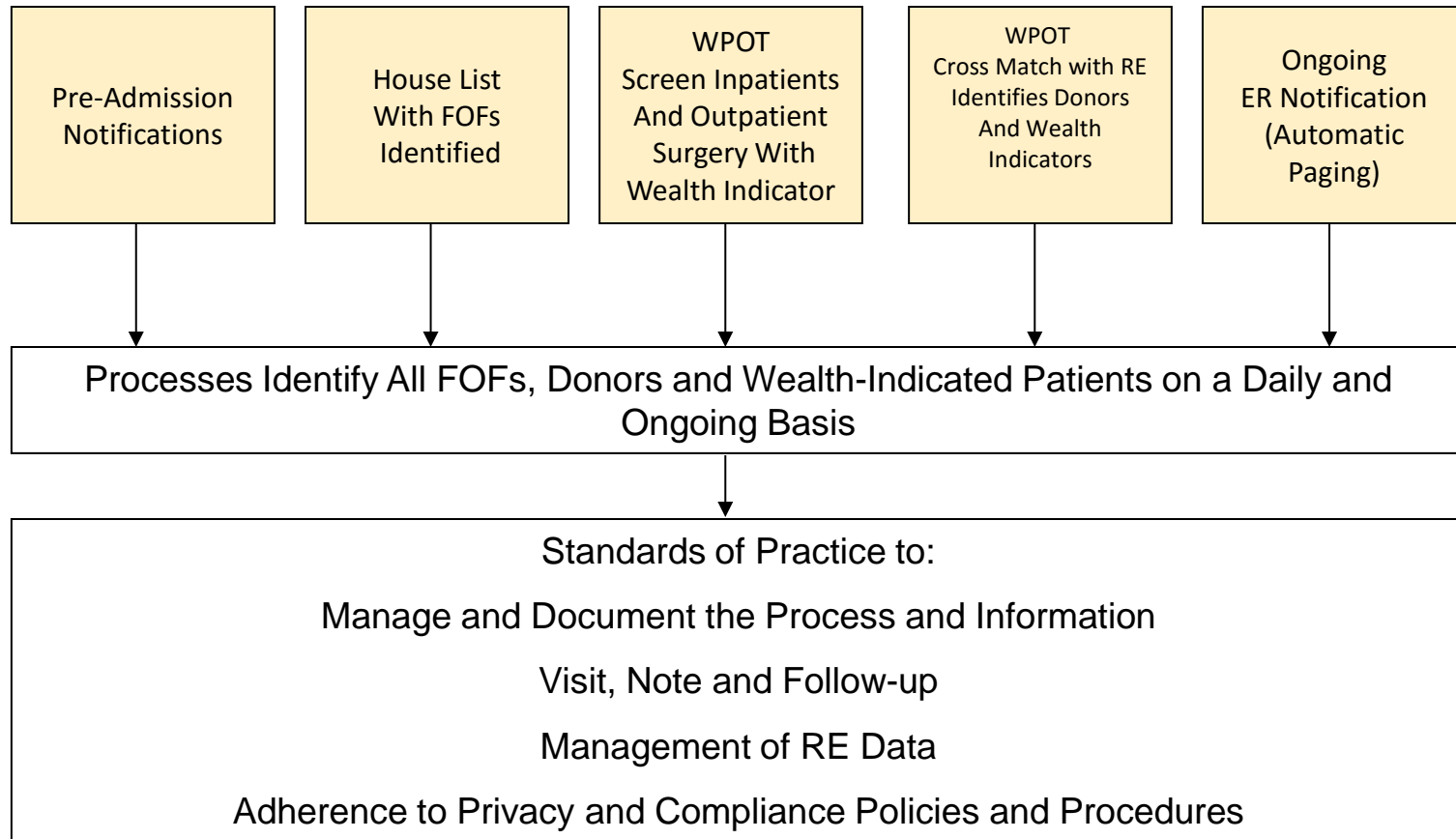
Understanding Who We Are – and The Generational Influences

Muddled Generations

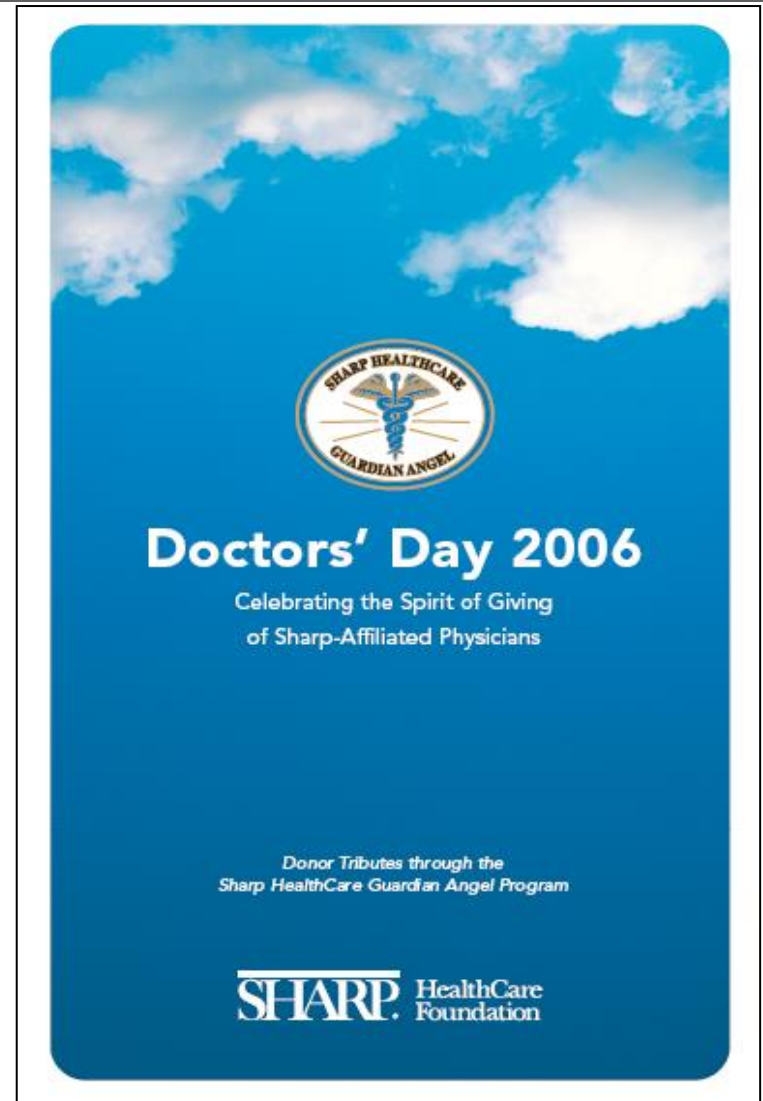
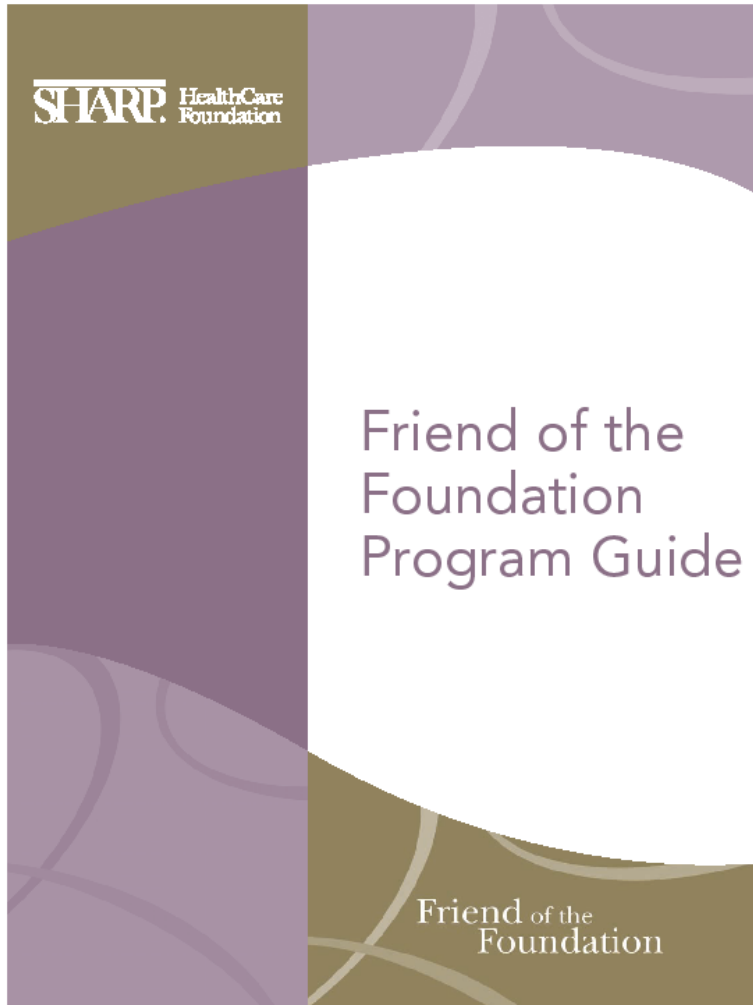
Number of people (in millions) by age in 2013. Ages with unclear generational definitions in gray.



Considerations for Management of Patient Screening and Visiting



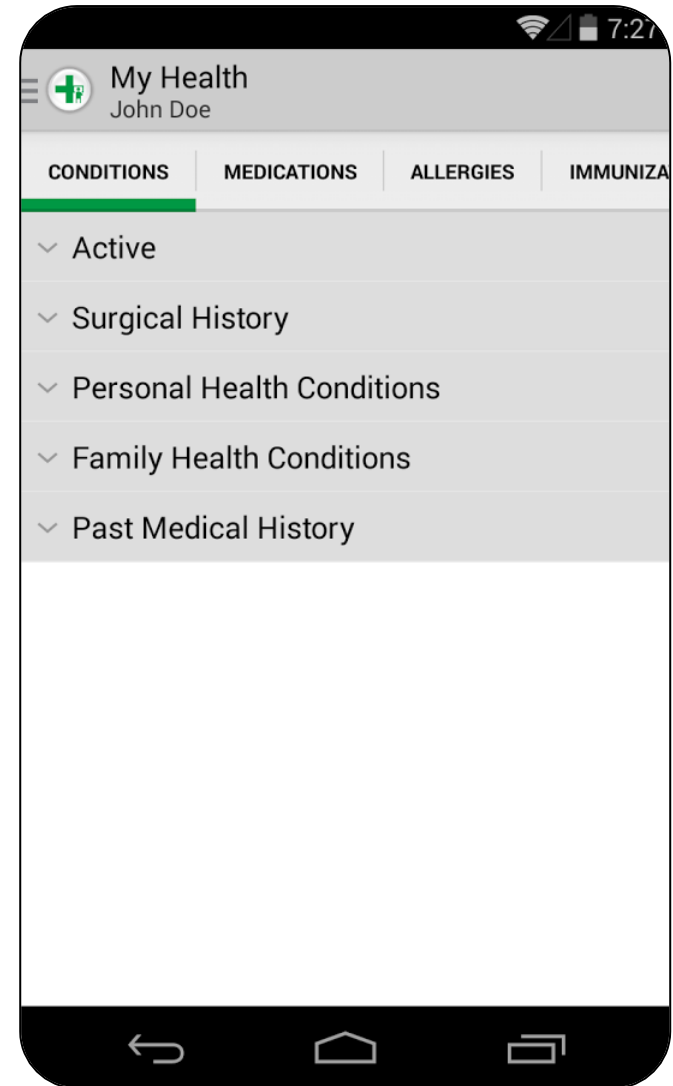
Two Big Winners With Patients



The Average User Picks Up Their Device 1,500 Times a Week

- **Personal**
- **Business**
- **Financial**
- **Social**
- **Health**

- **Philanthropy....**



E-Philanthropy Takes Center Stage in Connecting with Patients

Foundations of Sharp HealthCare

Dear Primary Salutation,

December 23 marks the 70th anniversary of the tragic loss of Lt. Donald N. Sharp in World War II. Five years later, his father would make a \$500,000 gift in his memory to establish the Donald N. Sharp Memorial Hospital. And in 2015, we will recognize the 60th anniversary of this extraordinary institution of caring, skill and dedication made possible by vision and generosity.



Your caring, skill and dedication are writing the new history of Sharp Memorial Hospital. And six decades after our founding, the health care at Sharp has received \$12 million for cross Sharp HealthCare.

have on the philanthropy at Sharp HealthCare. I'm honored to serve as chair of the

There are many ways

to include tax or in a charitable gift

Foundation w

Support Sharp Mary Birch Hospital for Women & Newborns - Windows Internet Explorer

www.counts.causeevolution.com/

Tools Help

Suggested Sites Web Slice Gallery

Support Sharp Mary...

Every breath counts.
Give every baby a chance. Make a gift today.

SHARP

47%

\$23,500
OF \$500,000 RAISED

REMAINING

ALL END ON 11/20/14 AT 12:00AM

Make a Donation



Sharp HealthCare 18 hours ago

Sharp HealthCare appreciates all of our physicians. Help us recognize them by making an honorary gift through our Guardian Angel Program during Doctors' Day, which is celebrated annually on March 30. <http://bit.ly/1drhUQE>

Thank you

Like · Comment · Share

85 people like this.

Write a comment...

Robert Payan De Leon about an hour ago

Judd Brennan Dr. Ehlersthank you for all you do!!!!

Juan Griselda Diego Dr. Song he's one of the great Doctors @ Sharp memorial 1 WEST Oncology....

Write a comment...

Sharp HealthCare @sharphealthcare · Mar 18

Join us for the 24th annual Victories of Spirit celebration on May 30

bit.ly/1mg97tc

Expand

Reply Retweet Favorite More



Major Gift Meeting Review and Discipline

SHF Major Gifts Mtg - Meeting Occurrence

File Meeting Occurrence Insert Format Text Review Developer

Sarah Cantu X : Automatic reply: Thank you for your email. I will be out of the office Thursday, January 29 through Friday, January 30. If you need immediate assistance, please call the Sharp HealthCare Foundation offices at (858) 499-4800. If your If your ne...

Occurs the second Wednesday of every 1 month effective 7/10/2013 from 8:30 AM to 10:00 AM
5 attendees accepted, 1 tentatively accepted, 0 declined.

To... Foundation Tech Way; Lyndsey Richards; Marsha Lubick; Christina Jordan; Pam Barnett; Sarah Cantu; Amanda Oieda; Shawna Fallon; Lisa Andrews; Andrea Landis

Subject: SHF Major Gifts Mtg

Location: Haugh Conf Room

Start time: Wed 1/14/2015 8:30 AM All day event

End time: Wed 1/14/2015 10:00 AM

SHF Major Gifts Meeting
1/14/2015
AGENDA

- Reflection - Shavna
- Major Gifts

Name	Gift Date	Gift Amount	Gift Type	Fund Description	Appeal Description	Solicitor	Gift Reference
Name	12/1/2014	\$10,320.18	Stock/Property (Sold)	Campaign for Sharp Rees-Stealy Technology Fund	S-Personal Contact		262 Shares of Sealed Air Corp (SEE), Angel Dr. T Korn

- MG Proposals

Proposal Purpose	Name	Date Asked	Ask Amount	Proposal Status	Proposal Name	Solicitors	Amount Funded	Date Funded
Major Gift	Name	12/1/2014	\$10,000.00	In Development	Naming opportunity	Nora J. Boswell	\$0.00	

- MG Solicitation Moves

Name	Action Date	Solicitor	Action Type	Action Status	Action Category	Action Description
Name	12/1/2014	Boswell	Solicitation	Move	Mailing	Personalized PIH lapsed letter

- Patient Visits

Name	Action Date	Description	Location	Solicitor	WPDT rating	Last Action Date	Last Action	Last Action Type	Last Action By	Last Action Descrip	Last Action Done?	First Gift Date	First Gift Amount
Name	12/1/2014	POF visit - Lyndsey	OPP	Barnett	D - Wealthy	12/3/2014	Mailing	Patient Relations	Barnett	Get well card	Yes		

- Year-End Activity/E-Philanthropy/Annual Report
- PIQS Update/Timing
- Donor for Spectrum Managers

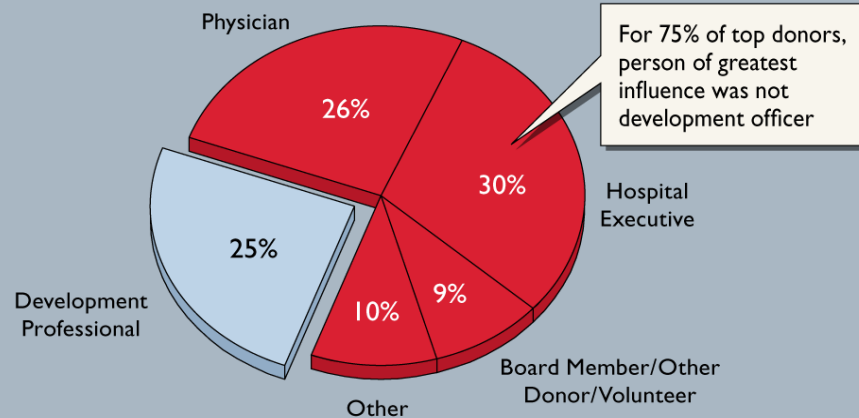


Influence in Health Care Philanthropy

Studies have shown that hospital executives, physicians and Board members have the greatest influence on major gifts. Important to facilitate those allied relationships.

A Relatively Small Piece

Person with Greatest Influence on Donor Relationship
From the Survey of Top Gifts Completed by Development Officers
n=147 gifts



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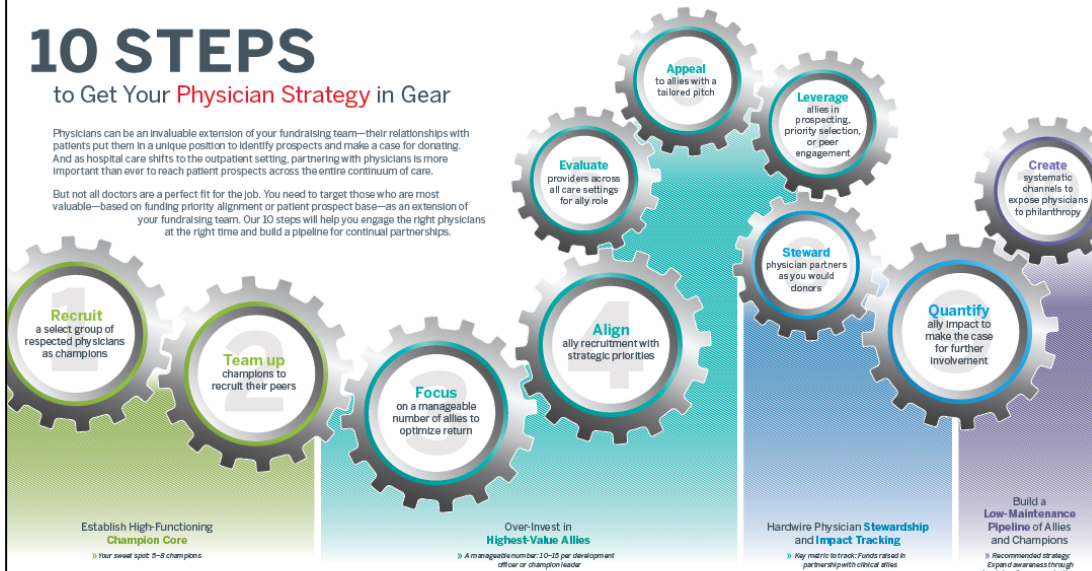


10 STEPS

to Get Your **Physician Strategy** in Gear

Physicians can be an invaluable extension of your fundraising team—their relationships with patients put them in a unique position to identify prospects and make a case for donating. And as hospital care shifts to the outpatient setting, partnering with physicians is more important than ever to reach patient prospects across the entire continuum of care.

But not all doctors are a perfect fit for the job. You need to target those who are most valuable—based on funding priority alignment or patient prospect base—as an extension of your fundraising team. Our 10 steps will help you engage the right physicians at the right time and build a pipeline for continual partnerships.



Case Study: NorthShore University Health System Foundation

Take a look at how one foundation engaged the right physician leaders to recruit peers, cultivate donors, and build an ally pipeline.

175+ allies recruited in five years by an single member, strategically signed champion core

13 new allies from top strategic areas recruited in last year

75% of gifts now attributed to physician involvement

100% of physicians exposed to a dedicated physician philanthropy K/strat site



Source: NorthShore University Health System Foundation, Interview by Ash Stiles, Philanthropy Leadership Council, 2016. [Learn more advisory.com/pk/gettinggear](http://www.advisory.com/pk/gettinggear) ©2016 The Advisory Board Company | Advisory.com - 27666

Allies Vital in Patient-Focused Philanthropy Program

PHILANTHROPY LEADERSHIP COUNCIL
 KEY CONSTITUENCY REPORT



WHAT NO ONE ELSE CAN DO

Trustees' Vital Role in Health Care Philanthropy

- ~ Achieving the Greatest Impact on Institutional Development
- ~ Avoiding Common and Costly Mistakes

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Research and Insights
 Philanthropy Leadership Council

Champion for the Cause

Maximizing the CEO's Effectiveness in Advancing Philanthropy

Topics: Internal Alliance Building, Philanthropy, Leadership, Workforce



Our Relationships Transcend the Entire C-Suite

CEO

- Influence on Major Donors and Prospects
- Leads the alignment of philanthropy in the institution

CFO

- Validates the financial role of philanthropy
- Articulates philanthropy's return on investment

CIO

- Champions integration of philanthropy and health care data and e-philanthropy
- Supports philanthropy integration throughout the IT infrastructure

CNO

- Provides leadership for nursing engagement in philanthropy such as recruitment, retention and training programs and participation in case development

CMO

- Champions philanthropy with MDs and support grateful patient referrals
- Provides leadership in clinical case development

Legal

- Assists philanthropy program in developing gift acceptance policies; HIPAA requirements

Planning

- Integrates philanthropy into the strategic and business plans of the institution
- Provides data and information for case development

Clinical

- Provides leadership for clinical case development
- Supports the foundation in clinical reporting information and outcomes; and grant and proposal development

Marketing

- Collaborates with the philanthropy program to translate case to collateral
- Integrates philanthropy into marketing and communication platforms including web, social, e-philanthropy



We Consider Philanthropy Not as Just Charity but as Investment:



“Never think you need to apologize for asking someone to give to a worthy objective, any more than as though you were giving him an opportunity to participate in high-grade investment. The duty of giving is as much his as the duty of asking yours. Whether or not he should give to that particular enterprise, and if so, how much, it is for him alone to decide.”

*John D. Rockefeller, Jr.
1933*



Questions and Discussion



Thank You and Good Luck!



Bill Littlejohn, CEO, Sharp HealthCare Foundation

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