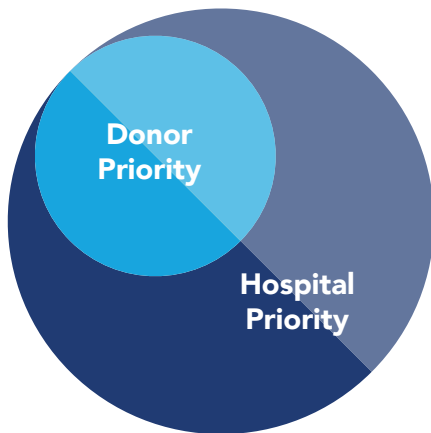


FOSTERING STRATEGIC ALIGNMENT IN PHILANTHROPY

Betsy Chapin Taylor, FAHP
President, Accordant Philanthropy



Alignment between the health care organization's strategic priorities and charitable funding priorities is essential to maximize the impact of donor dollars. However, many organizations fail to secure a shared vision, so philanthropy is used to advance low value priorities or development officers are left to de facto set hospital strategy.

Getting to a new level of collaboration requires health care organization leaders to understand how and why to optimize philanthropy as a key revenue source. Organizations must also commit to building a solid and consistent process to improve project selection, so philanthropy is no longer directed to the "nice to have" but to the most important strategic endeavors of the health care organization.

This brief explores one core concept on the journey toward alignment: just because something is the burning platform of the health care organization doesn't mean it will light the fire of a potential donor.

Hospital Priorities and Donor Priorities Aren't Always the Same

Just because an initiative is important to the health care organization doesn't mean it is a suitable project for which to seek charitable support. Simply, some things the hospital sees as essential are not relatable or meaningful for donors. Some projects are also poorly positioned to go forward as potential donor investment opportunities because of issues with timing, goal size, etc. So, vet the hospital's highest strategic priorities against these filters to see what projects rise to the top.

Core Questions Uncover Donor Appeal & Project Fitness

Would this dramatically **ENHANCE** outcomes or standard of care?
Is this project **RELATABLE** and understandable to the public?
Would this project create **EXCITEMENT** to ignite donor enthusiasm?
Would this project make a positive **IMPACT** on a significant number of people?
Is the project **UNIQUE** relative to our real or perceived competitors?
Will the proposed **OUTCOMES** be clear and measurable?
Is there an emotional patient **STORY** to illustrate the importance?

Is there a **PHYSICIAN CHAMPION** to actively explain the clinical benefits?
Is the project financially **SUSTAINABLE** once fully operational?
Does the **TIMELINE** for acquisition or start allow adequate time to campaign?
Is the **AMOUNT** achievable and meaningful?
Does the project meet **BUSINESS DILIGENCE** standards going forward?

Putting the Questions Into Action

An easy and visual way to complete this exercise with your key decision makers is to place all the projects on the left side of a grid with all criteria across the top; then, award 2 points for "yes", 1 point for "maybe" and zero points for "no". Then, add up points for each project to see what stands out. For example:

PROJECT	DONOR APPEAL REQUIREMENTS								FUNCTIONAL REQUIREMENTS				FUNCTIONAL TOTAL	
	Enhance	Relatable	Excitement	Impact	Unique	Story	Champion	Outcomes	DONOR APPEAL TOTAL	Sustainable	Timeline	Amount		Diligence
Expand Oncology Services	2	2	2	2	1	2	2	2	15	2	1	1	2	6
Build New Burn Unit	2	0	0	0	2	1	1	2	8	0	2	1	0	3
Replace Gurneys in ER	0	1	0	2	0	0	0	1	4	2	2	2	2	8
Fund Care for the Less Fortunate	0	1	0	2	0	1	0	1	5	0	2	1	1	4
Advance Clinical Innovation Initiative	2	2	2	2	2	2	2	2	16	1	2	1	2	6
Implement EMR	2	0	0	2	0	0	0	2	6	2	1	1	2	6

** To select projects to test, start by asking a simple "yes" or "no" question: "Does this initiative help fulfill the strategic vision and priorities of the healthcare organization? – a "yes" answer means you continue to answer the remainder of the question while a "no" means you cross it off the list entirely.*

It should be noted that strength in the "donor appeal" category is critical to go forward, so appeal must remain the primary consideration even if functional requirements are solid. Functional requirements inform both basic fitness of a project or can be used to inform appropriate scale or timing of projects.

However you choose to achieve strategic alignment, the ambition is worth the chase. Achieving alignment increases the financial impact of philanthropy in advancing the organization's mission, enables building a resonant case for support to invite donor investment and is a key to high performance philanthropy.