DELIGHTING DONORS WITH
POWERFUL IMPACT REPORTS

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Donor Relations Mission

To make donors glad they gave and eager to give more.
Rationale for Impact Reports

- Satisfy donor that his gift is being put to work
- Assure donor that her gift is being used in accordance with designation
- Demonstrate that their gift is changing the human condition for the better
Reporting Methods

- Print
- Electronic
- Embedded in institutional publications
- Featured in fund-raising publications
- Stand alone
- Internal audiences
- External audiences
The 3 most important messages to communicate:

- IMPACT
- IMPACT
- IMPACT
How do I Communicate Impact?

- FACTS
  - Demonstrate that the gift was spent and spent per donor intent and any gift restrictions
  - Include heartfelt testimony from actual beneficiary
  - Provide a financial snapshot as appropriate
Why is Impact Important?

- EMOTION
  - Remember to account for emotional impact
  - Why donors choose to give—and what they receive back from giving
  - What a difference giving makes to the beneficiaries
  - How giving furthers the mission and sustains the recipient institution
Philanthropy Update

Patients and Staff Benefit from Park Family Donation

The Park Cancer Education and Research Center was dedicated recently. The renovation of the suite of administrative, research and educational meeting spaces was made possible through the generous support of Dr. B.J. and Chunghi Park, Lahey patients and benefactors. An intimate group of friends and staff joined the Department of Hematology and Oncology in celebrating the Parks at the dedication and reception.

Lahey President and Chief Executive Officer David Barrett, MD, offered these words of appreciation: “This is a special opportunity to thank two people whose ongoing generosity has done so much for Lahey and its patients. B.J. and Chunghi were our Philanthropists of the Year in 2001 when they made their first great gift to endow a fund in our Endocrinology Department in honor of their lifelong caregiver and friend, Dr. Artie Pazianos. Today, we recognize B.J. and Chunghi for yet another terrific gift in support of Lahey’s vision for enhanced cancer care through expanded education and research.”

Keith Stuart, MD, chair, Hematology and Oncology, added, “One of the first meetings I had at Lahey was with Dr. and Mrs. Park. They sat in my office in 2006 and listened to my hopes and plans to advance cancer care at Lahey. Today, thanks to Dr. and Mrs. Park, we are providing better care to our patients. One of the key spaces in the Park Cancer Education and Research Center is the conference room. There we hold our frequent Tumor Conferences in which doctors from many disciplines come together to discuss individual cases, bringing collective knowledge to bear on how best to address an illness and improve outcomes and results for the patients. Thank you, Dr. and Mrs. Park, for making it possible for our staff to deliver enhanced care for patients and families facing cancer.”

Pictured: (from left to right) David Barrett, MD; Chunghi Park; B.J. Park, PhD; and Keith Stuart, MD.
Fighting Parkinson’s Disease

The Sydney Family of Brookline, Massachusetts, believes that supporting medical research is the best hope for finding the cure for Parkinson’s disease. Through their family foundation’s support of Lahey Clinic, Stanley and Sheila Sydney, and their five adult children, are contributing to medicine’s advance against this daunting foe.

Parkinson’s disease is a degenerative neurologic condition that causes a gradual loss of control over movement. Over 1.5 million Americans live with the disease and its onset usually occurs in people around age 60. For successful businessman Stanley H. Sydney, his health took a turn for the worse in 2007, when he was in his...
Dear Mrs. Butler,

Lahey Cardiology continues to excel! Just a few months ago, a Lahey Clinic cardiologist's innovative approach saved a naturalist's life through an unconventional use of a high tech cardiac device.

Like the baby whale in her well known children's book, *Crystal, The Story of A Real Baby Whale*, naturalist Karen Smyth is beginning a new life. Thanks to a doctor at Lahey Clinic Medical Center, she is the first person in New England to survive a near fatal heart attack through the unconventional use of a well-known device, the left ventricular assist device, or LVAD. (A left ventricular assist device (LVAD) is a battery-operated, mechanical pump-type device that's surgically implanted. It helps maintain the pumping ability of a heart that can't effectively work on its own.)
Dear Doreen,

Lahey Clinic remembers your parents, William and Doris Brown, with fondness and appreciates their enduring generosity. I am writing to update you on the activity of the perpetual endowment fund they established at the Clinic to support nursing education.

Nursing at Lahey is making news. The first class of students in the Lahey Clinic-Middlesex Community College Educational Partnership graduated on May 22...
Dear Mr. Sand,

Thank you for your kind letters to me and Dr. Barrett. Lahey is delighted that our effort to start yearly reporting to the "shareholders" of each endowment fund is being noticed and appreciated.

Here is the financial snapshot that you mentioned you would find interesting. Figures are the most recent available, as of 12/31/08.

<table>
<thead>
<tr>
<th>FUND</th>
<th>Principal</th>
<th>Market Value</th>
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<tr>
<td>Beach Cardiology Endowment</td>
<td>$610,798.44</td>
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<tr>
<td>Beach Gastroenterology Endowment</td>
<td>$516,400.00</td>
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Dear Ami,

Thanks to your generous support, the partnership between Lahey Clinic and the Canadian medical community continues to grow. The big news this year is the “graduation” of a resident and a fellow who will return to practice in Canada with new expertise in specialties that are in short supply.

This summer, Cindy Gao, M.D., completed a three-year residency in Internal Medicine and Anne Gonzalez, M.D., completed a fellowship in Interventional Pulmonology…
New Wave Impact Reports

- Not one size fits all
- Re-imagined
- Re-designed
- Re-directed to more donors than ever before
Multiple Reports: Multiple Audiences

- Annual Report
- Major Donor Impact Report
- Service Line Impact Report
- Major Milestones Report
Annual Report

- All donors and friends receive an annual report highlighting impact of philanthropy on the organization.
- May include Honor Roll so donors can see and be seen in the listing of valued supporters.
Major Donor Impact Report

- Major donors receive personalized reports with specific details about how their gifts were used and how their giving moved our non-profit mission forward.
Service Line Impact Report

- Group of donors each receive a copy of the same report on the impact of their collective giving to each of the most popular and/or strategic departments or programs.
- Includes specific details about how the combined gifts were used and how they moved our non-profit mission forward.
Major Milestone Report

- Philanthropy communicates to major donors and potential donors on the specific advances achieved as a result of charitable gifts
- Communicates SUCCESS
- Recruits reader to become part of this achievement and excitement
Lahey’s Decision to Change

- Ratio of staff to donors
- Maximum efficiency and effectiveness
- Membership in Philanthropy Leadership Council, The Advisory Board Company
  - Stewardship Best Practices (case study model)
Are YOU Ready to Evolve?

- Pull together a focus group, including active trustees and leading volunteers, educate them on the pros and cons of hand-crafted custom letters vs. template reports that achieve economy of scale and reach more donors than ever before
- Capture their comments, suggestions
- Green or red light?
Measuring Report Effectiveness

- Split your audience into random halves. Treat $\frac{1}{2}$ one way with the traditional report; $\frac{1}{2}$ with the 1-pager.
- Measure number, frequency, size of giving within following year.
- What patterns emerge?
Ask the Donors!

- Mail out new style reports to a segment of your top donors and follow up 4 weeks later with a survey - did the reports work for them, what was good, what was bad, what different items would they like to see...

- Adjust reporting program based on this feedback
Operationalizing Reports

- Plan the work, work the plan
- Set up content collection system
- Develop timelines
- Establish tracking log
- Develop task checklists
- Design templates
Recipe for Effective Content

- Say thank you
- Account for fund expenditures
  - Numbers: How much was spent on what
  - Narrative: Purpose/significance of this expenditure
- Stories about how constituents/staff have benefited from gift - become a story teller
- Metrics: statistics of progress underwritten by gift
Where Does Content Come From?

- Recruit/find institutional champions
- Make reporting part of your gift & endow policies
- Educate fund managers that reporting is obligation of receiving donated funds
- Set up an annual collection process
- Sign up “secret agent” facilitators in each dept.
- Call upon influencers for help (dept. liaisons)
- Polite persistence is essential
Sample Info Request: Fund Based

Dear Dr. Anderson,

- As the fiscal year closes, Philanthropy works in partnership with each fund manager within the Clinic to gather information to report to our donors on how the income from every endowment fund was spent during that fiscal year.
- In accepting an endowment gift, the Clinic agrees to supply the donor with an annual report demonstrating that the gift was used to further our mission, in accordance with the donor’s designation.
- May I please have one or two paragraphs in your own words on how the Special Purpose Funds (SPF) for the following endowment(s) were utilized in FY08?

- The following funds are non-specific and may be used to support any or all of Lahey’s tripartite mission goals of research, education, and patient care:
  - X, Y, Z
- The following funds are restricted to Education and Research:
  - A, B, C
- When Lahey’s donors see that their previous gifts are being put to good use here at the Clinic, they are most likely to give again.
Dear Dr. Alpha and Dr. Omega,

Philanthropy proposes to send the attached report to donors and friends of the Heart & Vascular Center to show them that gifts have an important impact on the Clinic’s work to help advance medicine and deliver the best care to our patients.

We believe that reporting back to our donors in this way is an important step in readying them to make further gifts.

Good to go?

Please let me know your thoughts.

Sincerely, Robin Good
Set up Fund Managers for Success

- Supply Fund Managers with master control sheets outlining purpose and designation restrictions of each fund under their control
- Maintain a predictable calendar for information requests - for Lahey, requests go out in October/November for previous FY spending that ended on September 30th
- Tracking system is maintained on Excel
- 2 Follow up e-mails sent
- Dept. liaison’s help is requested for 3rd request
Mining for Content

- What if fund manager supplies spending info, but it is sparse?
- What if fund manager does not supply spending info?

- Seek alternative sources of information for impact reports
  - Re-purpose content from individual report to service line report
  - All organizational internal/external publications—mine them!
  - Your organization’s Web pages
  - Internal announcements of department activities
  - PowerPoints from Managers’ Meetings
  - Press Releases
  - Media coverage about your non-profit
  - Solicitor action reports
  - External research publications
**Old Style Tracking Log on Excel**

- **NAME**
- **DEPARTMENT**
- **PURPOSE**
- **DESCRIPTION**
- **FUND MANAGER**
- **Liaison**
- 1st Request to Fund Manager
- 2nd Request to Fund Manager
- 3rd Request to Fund Manager and/or Liaison for follow up
- 4th Request from Dr. Barrett
- Report Received
- Report Created
- Report Distributed
- Donor/NOK
- Solicitor
- Notes

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This is the work of Robin Good. Please share & cite appropriately.
Current Tracking on Raiser’s Edge

- Each fund has own constituent record
- Key stakeholders are recorded as Relationships
- All activity is recorded as Action
- All reports are added to Media Tab
Task Checklist on Outlook

Task Request in Microsoft Outlook, specify 1 week timeline

- Here’s PDF copy of the endowment report to go to M/M Kindonor
- Please add RE action item, on endow record only, that report was sent to PN for review.
- Please proof and let me know if corrections need to be made.
- Please print out B/W (not color) on printer and file in hardcopy Endow File.
- Please print out in color and send to Donor, unless I tell you before due date that MGO is suppressing this report.
- As donor is living, please save e-copy to media tabs both of donor and endowment record in RE
- Please add action item: "RCG created FY08 Endowment Report" to endowment fund record
- Please add action item "Donor Relations sent Name X Endow Report to donor" to both donor record & endowment fund record.
- Anything else needed?
Recipe for an Effective Format

- Easy to scan
- Feature headings and bullet points
- Showcase human interest stories
- Include photos/graphics
- 12th-grade reading level or less
Templates = Efficient Reporting

- Deliver better service with less production time
- Streamline the report to 1 or 2 pages
- Design flexible format that is “on brand”
- Minimize the amount of original text
- Recycle and reuse info from elsewhere
Where do templates come from?

- Your general public relations office
- Your dedicated development communications office
- Your freelance designer
- You and your desktop software
- Microsoft Office Online:
Review Process

- Dept. Chair(s)
- Administrative staff (business manager)
- Communications and Marketing Editor
- Photo and quote subjects (signed release)
- Legal & Compliance Officers
- SVP Philanthropy
- Staff Officer (assigned to dept. or donor)
- Proofreader
Production Details

- E-mail if possible
- One-offs:- Print on office color printer
- Group mailing: Color copy
  - 100 lb stock if two-sided
  - 80 lb stock if one sided
  - .87 cents or less each
Report to Philanthropic Investors

What happens when you make a gift to Lahey? First of all, 100 percent of it goes directly to medical progress. Each gift touches the life of every patient who will ever come to Lahey. Each gift helps patients elsewhere who will benefit from the medical progress produced here. Such generous giving is certainly philanthropy—selfless giving for the benefit of humanity. In a progressive and efficient place like Lahey, a gift is also an investment. It is our responsibility and privilege to serve as stewards of your gifts and share regular reports to our philanthropic investors on the scope of charitable giving to Lahey. (Lahey Clinic’s fiscal year is October 1 through September 30.)

Annual Report to Philanthropic Investors
- FY 08 Report
- FY 07 Report
- FY 06 Report
- FY 05 Report
- FY 04 Report
- FY 03 Report
- FY 02 Report

Impact Reports for Donors
- Heart & Vascular Center
- Nursing
- Urology
Recycle & Re-purpose: Cultivation of Next Donor

We had a very nice initial meeting.

Mr. C still goes into the office every day.

I gave Mrs. C a copy of the Urology Impact Report and Philanthropy Highlights

I emphasized how those patients who choose to support Urology are also furthering continued advances in the field here at Lahey.
What I use at Lahey

- Microsoft Word
- Microsoft Publisher
- Microsoft Outlook E-mail
- Adobe Acrobat Professional
- Adobe Photoshop
- Raiser’s Edge
Sample Reports

- Annual Report to Philanthropic Investors
- Major Donor Impact Reports
- Service Line Impact Reports
- Major Milestone Reports
Sample Annual Report: I

• **FY-08 Report to Philanthropic Investors**
Philanthropy Update 2008-2009
Sample Major Donor Impact Report: I

- Community Medicine Donor Report
Sample Major Donor Impact Report: II

- Egypt Donor Impact Report
Sample Major Donor Impact Report: III

● Ethics Donor Impact Report
Sample Service Line Report: I

- Sample Nursing Donor Impact Report
Sample Service Line Report: II

● Sample Urology Donor Impact Report
Sample Service Line Report: III

- Sample Heart & Vascular Institute Donor Impact Report
Sample Major Milestone Report: I

- Lahey named top 100 cardiovascular hospital
Sample Major Milestone Report: II

- Lahey releases new "Thanks to you!" video
Lahey surpasses campaign goal
Donor Feedback: Elizabeth

“Thank you.

I am glad Dr. Nesto is finding it useful.”
Donor Feedback: Bob

“Thanks for all the news.

I am proud to have been a physician at Lahey.”
“Thank you for sending me this most impressive report.

I am a living testimonial of Lahey excellence. I had my triple bypass on 9/15/99 and to this date, at age 70, I am still a good tennis player, an active golfer (with an unacceptable handicap), and a very attentive husband, father and grandfather.

Thank Lahey for the above.”
Thank you for your attention and participation!
Discussion

• Compare and contrast your experiences to the Lahey case study
• Ask questions and offer advice
• What are your report crafting and tracking challenges?
• Let’s brainstorm and problem-solve within the group