
Index

- Abelson, R., 14
Abington Memorial Hospital Obligated Group, 24
Accountability: for charity care, 140; for financial performance, 64–68
Accounting, 131
Active outreach, 92–93
Advertisements, 92
Advisory Board, 14, 127
AHP. *See* Association for Healthcare Philanthropy (AHP)
The Altruist personality, 36
American Hospital Association, 14, 138, 142
American Institute of Certified Public Accountants, 61
American Institute of Philanthropy, 62
American Medical Association, 58–59
Annual Information Return (IRS Form 990), 61, 62
Annual reports, 62
Application management, 93
Association for Healthcare Philanthropy (AHP), 5, 46, 59, 92, 135

Barr, A., 32
Benchmarking: and conflicts in philanthropy, 133; definition of, 110; indicators sample for, 111–114; national collaboration for, 109–117; overview of, 109; and philanthropy conflicts, 124–125
Benefice Information Center, 62
Benko, L. B., 141, 143
Bequests, 117, 119
Bernd, D., 141, 142
Better Business Bureau, 62
Billing policies, 139. *See also* Hospital pricing
Blendon, R. J., 141
Blue Cross/Blue Shield, 141

Board members: and decreased donor attrition, 34; and donor recruitment, 37, 38–39; and philanthropy conflicts, 123
Bonuses, 107
Borrowing funds, 24, 43–44, 45, 122
Bradford, J. R., 24
Briefing packets, 9
Brochures, 25
Brotman, M., 51
Budgets: competition in, 67–68; and FASB requirements, 20; integration of fundraising into, 20–23; and leadership recruitment definition, 91; and philanthropy conflicts, 129, 130–131; and physician fundraising, 56–57; and public relations, 79, 80*t*. *See also* Fundraising expenses
Burke, P., 30–31

California Health Care Association, 142
Canada, 44
Candidate management, 94
Capacity, 100
Career development, 104
Center on Nonprofit and Philanthropy, 76
Center on Philanthropy, 76
Centers for Medicare and Medicaid Services, 141
Charitable Choices, 62
Charitable gifts. *See* Gifts
Charities Aid Foundation, 62
Charities USA, 63
Charity Canada, 63
Charity Guide, 63
Charity Navigator, 63
Charity Registration Offices, 63
Charity watchdogs, 62–64
Chern, M. A., 135

- Chief executive officers: changes in, 45; creation of position of, 44; donors' relationship with, 49; fundraisers' obligations to, 50; and philanthropic culture, 46–50; views of philanthropy, 3
- Chronicle on Philanthropy*, 63
- Ciconte, B. L., 76
- Clarke, R., 143
- Collins, S. R., 140
- Commitment, 11–12
- Commonwealth Fund, 140
- Communication: and corporate environment, 9; and donor recruitment, 36, 37; and financial reporting, 11; and fundraiser recruitment, 100; and hospital billing process, 145; and leadership recruitment definition, 90; and philanthropy conflicts, 129–133; of public relations department, 39
- The Communitarian personality, 36
- Community: hospital's value to, 144; needs assessment of, 144; and philanthropy conflicts, 125–130; relationships with, 48
- Competition, 16, 67
- Conflicts, in philanthropy: and benchmarking, 124–125; and board members, 123; and budgets, 129, 130–131; and communication, 129–133; and community, 125–130; and HIPAA, 131–132; overview of, 121–122; philanthropy's role as, 125–129; and return on investment, 122–124; and salaries, 123–125; and technology, 132–133; underappreciation as, 122–125
- Consolidated annual budget plan, 80
- Consumer advocates, 139
- Conversations, 36
- Copilevitz & Canter, LLC, 63
- Corporate environment: and communication, 9; and customers, 9–10; and employee commitment, 11–12; and financial reporting, 10–11; and friendliness, 9–10; and GANTT charts, 9; and punctuality, 8; and strategic plans, 7–8
- Cosgrove, D., 144
- Cost analysis, 61–62
- Costa, N. G., 13, 22
- Cost-benefit analysis, 72–78
- Credibility, 38
- Criticisms, 55
- Culture: change in, 46–50; and fundraiser recruitment, 100–101; and leadership recruitment definition, 90
- Customer service, 145
- Customers, 9–10. *See also* Patients
- Davis, K., 136–137
- Demand-side philanthropy, 25
- Development programs: and FASB requirements, 18–20; integration of, into budget, 20–23; making the case for, 16–18; performance evaluation of, 64; pressures on, 15–16; ratings of, 62–64. *See also* Fundraisers
- The Devout personality, 36
- DeWolfe, J., 20–21
- Direct expenses, 69–72, 80
- Direct mail, 32
- Donor attrition: statistics on, 30; strategies to decrease, 31, 32–35; study of, 32–35
- Donors: attitudes of, 47; CEO's relationship with, 49; changes in, 45; confidence of, 15; as customers, 9–10; education of, 25; ethnicity of, 105; lack of financial reporting understanding of, 15–16; membership society of, 25; motivations of, 4, 40, 82; personalities of, 35–36; preferences of, 82, 83; recognition of, 25, 31, 37–38; recruitment of, 36–40; and supply-side philanthropy, 25–26; surveys of, 22–23; top third of, 30, 35–40. *See also* Patients
- The Dynasty personality, 36
- Education programs, 25, 52–58
- Effectiveness, 65
- Elected officials, 144
- Employees: commitment of, 11–12; as customers, 9–10
- Endowments: restrictions of, 18–19; use of, 24–25

- Enthusiasm, 90
 Ethical behavior, 104
 Ethnicity, 105
 Evans, M., 139
 Executive searches, 101
 Expenses, 131. *See also* Fundraising expenses
- Face-to-face interviews, 94
 Face-to-face solicitations, 55
 Failures, 105
 Falk, S. C., 3
 Farrey, C., 145
 FASB. *See* Financial Accounting Standards Board (FASB)
 File, K. M., 36
 Finance: and the case for development programs, 16–18; and FASB requirements, 18–20; overview of, 13–14; partnerships in, 26–27; and pressures of development programs, 15–16; pressures on, 14–15; and underwriting of operating and capital needs, 23–26
 Financial Accounting Standards Board (FASB), 15–16, 18–20
 Financial reporting, 10–11, 15–16
 Financial statements, 62
 Fleishman, J. L., 66–67
 Fong, T., 139
 Fraud, 67
 Freeman, G. L., 87
 Friendliness, 9–10
 Fundraiser recruitment: and communication, 100; and culture, 100–101; and mission statements, 100; overview of, 99–100; search process in, 101–102; and succession planning, 102–103. *See also* Leadership recruitment
 Fundraisers: commitment of, 11–12; competition among, 16; misconceptions of, 4; obligations of, to CEO, 50; performance evaluation of, 64; perspectives of, 5; professional titles of, 46; ratings of, 62–64; retention of, 103–107; role of, before World War II, 43–44; and supply-side philanthropy, 25–26. *See also* Development programs
- Fundraising expenses: analysis of, 67–68; and budget allocation, 69–72; and cost-benefit analysis, 72–78; definition of, 61; and donor relationships, 82–83; and program budgeting, 79–83; reporting of, 61–62. *See also* Budgets; Expenses
 Fundraising paradigm, 89
- GANTT charts, 9
 Generally Accepted Accounting Principles (GAAP), 10–11
 Gifts: benchmarking of, 109–117; and cost-benefit analysis, 72–78, 114–117; and FASB requirements, 18–20; financial reporting of, 11; multiple uses of, 15; physicians' solicitation of, 54–56; uses of, concerns about, 15
 Gilbert, C. J., 103
 Give Spot, 63
 Goals: and leadership recruitment, 88–89; short-term versus long-term, 13
 Graduate schools, 44
 Gray, B. H., 67
 Gray, N., 21–22
 Greenfield, J. M., 61
 Greenwich Hospital, 145
 Greenwood, R. H., 20–21
 Group interviews, 94
 Growth-in-giving analysis, 77, 78*t*
 Guide to Cruelty Free Giving, 63
 GuideStar, 63
- Hager, M. A., 62, 77
 Hall, F. R., 43
 Hansen, J. F., 20–21
 Hay Group Hospital Compensation Survey, 124
 Health Capital Group, 138
 Health Care Financial Management Association, 142–143
 Health care management, 44
 Health Insurance Portability and Accountability Act (HIPAA), 58–59, 131–132
 Hill-Burton grants, 43
 Hock, D., 99
 Hook, M., 51

- Hospital Association, 124
- Hospital pricing: AHA's response to, 142–143; history of, 140–143; hospital-level management of, 143–146; management of, 143–146; recent scrutiny of, 135–140. *See also* Billing policies
- Hospitals: competition among, 67; financial stress of, 14–15; history of, 43–44; increased dependence on philanthropy by, 43–45; lawsuits against, 138; nonprofit versus for-profit, 137–138; quality indicators of, 12; sources of capital of, 45; tours of, 48; value of, 144
- Hubbell, G., 146
- Human resources department, 101
- Idealist, 63
- Independent Charities of America, 63
- INDEPENDENT SECTOR, 15
- Indigent care, 129, 136, 138, 139–140, 143
- Indirect expenses, 69–72, 79
- Information packets, 9
- Insurance programs: and hospital pricing, 141; payment struggles of, 14–15
- Integrity, 100
- Interest surveys, 22–23
- Internal promotions, 101–102
- Internet advertising, 92
- Internet ratings, 62–64
- Internships, 105
- Interpersonal skills, 101
- Interviews, 94–96
- The Investor personality, 36
- Invoices, 145
- Jaklevic, M. C., 138, 140
- Jaschik, S., 84
- Jay, E., 82
- Job sites, 92
- Johns Hopkins University, 144
- Joint Commission on Accreditation of Healthcare Organizations, 64
- Just Give, 63
- Kansas Charity Check, 63
- Kelly, W., 121
- Labor unions, 139
- Lagnado, L., 136, 137
- Lawsuits, 138–139
- Leadership giving group, 22–23
- Leadership recruitment: and candidate identification, 93–94; and candidate selection, 94, 96–97; and definition of search dimensions, 89–91; institutional factors affecting, 87–91; and institutional goals, 88–89; interviews in, 94–96; overview of, 87, 97; strategic design for, 91–93; and talent evaluation, 95. *See also* Fundraiser recruitment
- Learning circles, 133
- Legacies, 35
- Letters, thank-you, 32–33, 56
- Listening, 55
- Loma Linda University Medical Center, 136
- Long-term goals, 13
- Looney, C. A., 99, 103
- Looney, J. K., 99
- Lucas, C., 125
- Major gift service line managers, 110–117
- Major gifts interest survey, 22–23
- Malaise, 129–130
- Managed care, 44
- Mapp, J. W., 51
- McGinly, B., 5
- Measurements. *See* Benchmarking
- Media, 136–140
- Medicaid, 129
- Medical journals, 39
- Medical technology, 43
- Medicare, 44, 45, 129
- Meetings: and GANTT charts, 9; and punctuality, 8
- Mentors, 97
- Metrick, A., 29
- Mission statements: acceptance of, 7; and budget process, 21; and donor recruitment, 37; example of, 7; and fundraiser recruitment, 100; and fundraiser retention, 104, 105; of nonprofit hospitals, 137–138
- Mitchell, S., 67
- Money Magazine*, 63
- Monster.com, 92

- Moody's Investor Services, 14
Morgan, T. U., 121
Motivation: of donors, 4, 40, 82; of fundraiser candidates, 100
- National Association of State Charity Officials, 63
National Commission on Philanthropy and Civic Renewal, 63
National Health Plan, 44
National Resources Defense Council, 63
Net assets, 18–20
Net revenue, 73
Networking, 102
Newsletters, 32, 39
Newspapers, 39
Nonprofit corporate environment, 7
Nonprofit Fundraising and Administrative Cost Project, 76
Nonprofit Times, 63
Nurses, 14
- Oakwood Healthcare System Foundation, 21–22
O'Malley, C., 21–22
Operating margins, 14
Operating standards, 77
Organizational charts, 91
Outpatients, 145
Overhead expenses, 69–72, 79
- Panas, J., 30
Partnerships, in finance, 26–27
Patient finance office, 145–146
Patient Friendly Billing Project, 143
Patient satisfaction studies, 66
Patients: attitudes of, 47; and physician solicitations, 54–56, 57–58; protection of physicians' relationship with, 58–59. *See also* Customers; Donors
Performance benchmarking. *See* Benchmarking
Permanent restricted funds, 18–19
Personality profiles, 36
Philanthropic culture, 46–50
Philanthropic personalities, 36
Philanthropology, 4
Philanthropy: chief executive officers' views of, 3; misconceptions of, 4; and problems of strategic plans, 6; and relationships, 4
Philanthropy conflicts. *See* Conflicts, in philanthropy
Phone interviews, 93–94
Phone recognition, 32–34, 35, 56
Physician champions, 57–58
Physician fundraising: education for, 52–58; first step in, 51–52; need for, 51; and physician-patient relationships, 58–59
Physicians: and donor recruitment, 38–39; protection of patients' relationship with, 58–59; role of, in fundraising development, 48; role of, in relationships, 45–46
Planned giving, 15, 24–25
Pollak, T., 77
Position profiles, 91
Praise, 104
Pride, 103
Primary purpose guideline, 61
Prince, R. A., 36
Privacy, 59
Productivity, 129
Program budgeting, 79–83
Prospect research, 55
Public appearances, 48
Public confidence, 66
Public relations: and budgets, 79, 80; for donor recruitment, 39–40; and hospital pricing management, 143–144; importance of, 40; and leadership recruitment strategies, 92
Punctuality, 8
- Recognition membership society, 25
Recognition, of donors, 25, 31, 37–38
Recruitment. *See* Fundraiser recruitment; Leadership recruitment
Reference checks, 94–95
Reimbursement, reduced, 140–142
Relationships: with community, 48; and fundraising budgets, 82–83; and fundraising expenses, 82–83; and leadership recruitment definition, 91; and philanthropy, 4; physicians'

- role in, 46; with top-third donors, 36, 38–39, 40
- The Repayer personality, 36
- Reputation, 101
- Research: benefits of, 40; of prospects, 55
- Respect, 103–104
- Résumés, 93
- Return on investment: accountability for, 64–67; and cost-benefit analysis, 72–78; and philanthropy conflicts, 122–124
- Rooney, P. M., 77

- Salaries, 14, 106–107, 123–125
- Sandford, J. R., 65
- Sargeant, A., 82
- Schlesinger, M., 67
- Scruggs, R., 138
- Search committee interviews, 94
- Search firms, 101
- Selden, S. C., 65
- September 11, 2001, terrorist attacks, 15
- Service Employees International Union, 139
- Short-term goals, 13
- Sloane, T., 142
- Slutsky, A., 31
- Smart Money*, 63
- Smith, S. R., 109
- The Socialite personality, 36
- Society Guardian, 63
- Sowa, J. E., 65
- Special-purpose funds, 23–24
- St. Michaels Hospital Foundation, 30, 31–35
- Stakeholders, 88
- Stewardship: benefits of, 29–30; importance of, 40
- Strategic goals, 5
- Strategic plans: balance of, 6–7; and corporate environment, 7–8; overview of, 5; problems of, 6
- Success, 37, 39
- Succession planning, 102–103
- Supply-side philanthropy, 25–26

- Tax-exempt status, 137
- Taylor, M., 137, 138
- Technology, 43, 132–133, 141
- Tempel, G., 25
- Temporary restricted funds, 18, 23–24
- Tenure bonuses, 107
- Thank-you model, 32–35
- Tieman, J., 139, 141
- Time analysis surveys, 69, 72
- Time management, 35
- Training videos, 52–53
- Trust, 66
- Turnover, 107

- Universities, 44
- University of California-San Francisco, 136
- University of Toronto, 31
- Unpaid expenses, 131
- Unrestricted funds, 20
- U.S. Department of Treasury, 61
- U.S. House Ways and Means Committee, 137

- Value-add components, 6
- Vendors, 131
- Videos, training, 52–53

- Wall Street Journal*, 136
- Watson Wyatt Hospital and Health Care Compensation Report, 124
- Weyl, S., 138
- White Memorial Medical Center, 143–144
- Williams, K., 46–50
- Wise Giving to Charities, 63
- Work environment, 104
- World War II, 43
- Worth*, 63
- Written educational materials, 54–56