

HONORHEALTH®

Foundation

2022 Strategic Plan

Executive Summary

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2022 Strategic Plan

For a third consecutive year, HonorHealth Foundation exceeded its goals and posted a new fundraising record of \$60,406,550 in cash and commitments, achieving 195 percent of goal.

This is particularly notable as it occurred during the second year of COVID-19 restrictions—another year that required fortitude and creativity to connect with donors, secure their commitment and deliver meaningful stewardship, often from a distance.

Even as we celebrate this remarkable milestone, the Foundation team is already fine-tuning our 2022 strategies to generate new revenue to meet the strategic priorities of HonorHealth and support our programs that rely on philanthropy to meet the needs of our patients and community.

As in prior years, fundraising priorities are guided by the strategic priorities of the HonorHealth system as follows:

Strategic Priority	Production Goal
Cardiovascular Centers of Excellence	\$15,000,000
Greatest Needs Fund	\$6,000,000
Desert Mission Endowment	\$5,000,000
Research & Innovation Institute	\$4,000,000
Integrative Medicine—primary care	\$1,000,000
Behavioral Health Patient Assistance Endowment	\$1,500,000
Donor designated gifts (other)	\$7,500,000
TOTAL	\$40,000,000

Top Department Initiatives in 2022

Office of the President & CEO

- Raise \$40M through 6,000 donors
- Implement the approved enterprise-wide naming rights and standards
- Formalize an operating agreement between HonorHealth and the Foundation relating
- Formalize a fundraising agreement between Desert Mission and HonorHealth Foundation
- Continue developing strategies for trustee recruitment, engagement and referrals
- Transition financial talent from outsourcing solution to staff positions; fill open positions
- Develop scope for a campaign feasibility study; engage outside consultant to assess Foundation readiness and scale of a comprehensive, multi-year fundraising campaign to raise \$100M+

Development

- Expand CVCOE campaign to the West Valley to achieve \$15M fundraising goal
- Execute new Desert Mission fundraising breakfast, leveraging DM Board and committee members to raise at least \$500,000
- Activate \$1.2 million in new corporate and donor partnerships that align with system-wide funding priorities, event sponsorship and affinity partnerships
- Develop the federal grants portfolio, increasing revenue from federal grants for the HonorHealth system and community benefits programs
- Refine and integrate a comprehensive grateful patient program with targeted Foundation and system departments

Fundraising Revenue Goals

TEAM	STRATEGIES	REVENUE GOAL
Corporate & Events Fundraising	<ol style="list-style-type: none"> 1. Execute new Desert Mission Fundraising Breakfast utilizing DM Board and committee members to raise \$500,000 for its many programs and services. 2. Activate \$1.2 million in new corporate and donor partnerships that align with system-wide funding priorities, event sponsorship and affinity partnerships. 3. Engage Board of Trustees to support, attend and promote HonorHealth Foundation Events, third party fundraising strategies and bring new donors to HonorHealth Foundation. 	\$5,000,000
Grants	<ol style="list-style-type: none"> 1. Develop the federal grants portfolio, increasing revenue from federal grants for the HonorHealth system and community benefits programs 2. Rebuild the Grants program by hiring two new team members and expanding the breadth of grant opportunities pursued to have a greater focus on hospital and research-based grants. 	\$5,000,000
Annual Giving	<ol style="list-style-type: none"> 1. Develop our pipeline through prospect identification 2. Enhance stewardship activities to build loyalty and retention 3. Generate new revenue to support Cardiovascular Center of Excellence and Greatest Needs. 4. New donor acquisition, retention, reactivation, and upgrades 	\$4,500,000
Major Giving	<ol style="list-style-type: none"> 1. This is the year of stewardship. Provide outstanding donor experiences and deeper involvement - what sets us apart 2. Refine a comprehensive grateful patient program for Major Gifts 	\$17,500,000

	<ol style="list-style-type: none"> 3. Grow the team - hire one Vice President of Major Gifts – highly skilled, seasoned professional 4. Hire additional Major Gift Officers by the end of 2022 5. Refine processes and efficiencies to further grow our revenue and donor service 	
Planned Giving	<ol style="list-style-type: none"> 1. Hire an Associate Vice President of Planned Giving 2. Grow the pipeline through engagement of donors and key constituencies: <ul style="list-style-type: none"> • Galentine’s Day event • Lunch & Learns • Palliative Care team • Financial Health Advisor Council • Real Estate Committee 	\$8,000,000
Total Revenue Goal		\$40,000,000

Communications & Donor Relations

- Develop marketing strategies, materials to support strategic priority fundraising
- Make continuous website improvements based on user metrics and fundraising program support needed; transition to new e-marketing software
- Launch system-wide Grateful Patient communications campaign including patient- and physician-facing materials
- Develop digital marketing campaigns that align with fundraising appeals, drive new prospects and increase donor count
- Revisit a Champions Plus expansion in gratitude for higher levels of giving
- Engage Trustees in stewardship through a donor “thank you” call program

Technology & Data Analytics

- Actively searching for leader of this new division
- Prospect Research team will transition to this division, focusing on:
 - Best practice for moves management and engagement strategies for all fundraising departments
 - Automate patient prospect referral capability within the hospital system's EPIC software that will enable any system employee trained to listen for "cues of gratitude" to make a referral to the Foundation quickly and easily
 - Complete migration of Raiser's Edge and Financial Edge to the Cloud and ensure a full integration between both products for improved data security and performance
 - Maximize ResearchPoint software to increase donor count and screen prospective donors for affinity, capacity, and propensity to give AND build pipeline strategies for upcoming campaigns and new funding initiatives

Finance

- Improve efficiency, accuracy, trust by attracting a highly qualified Controller; the selected candidate will be responsible for building the new finance team
- Complete the transition of Financial Statement reporting for HHF to Financial Edge G/L system
- Integrate Raiser's Edge and Financial Edge software packages
- Complete signed operating agreement between HonorHealth and HonorHealth Foundation
- Formalize Foundation operations budget in accordance with tenets of a master services agreement between HonorHealth and HonorHealth Foundation
- Enhance funds distribution process to increase efficiency, transparency
- Deploy dashboards for gift officers and organization performance within new database
- Activate Grants module in Financial Edge software
- Continue implementation of process and procedure changes to streamline and increase accuracy and efficiency