




Engaged
Generosity

BE INTENTIONAL WITH YOUR TIME AND PORTFOLIO


Avoid too many internal meetings that distract you from prospect work. While most staff in the hospital are internally focused, you need to be externally focused. Don't be afraid to explain this to leadership.

Set aside and guard time on your calendar to call/email/text and visit with benefactors and prospects.



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Balance your portfolio with prospects in different stages.



You may have great momentum with five prospects and could be tempted to spend all your time cultivating and closing gifts from them to achieve your goal. However, you won't have a next wave of ready prospects for year two. Keep qualifying new prospects and keep in touch with the ones who tell you, "I would give but now is not the time." Go deep into your portfolio for the prospects you plan to close in the next year but also go wide in qualifying new ones.




Write your strategies down and keep updating them.




You may or may not be required to do this within the CRM or on a form but regardless, develop strategies for the top 25% of your portfolio and revise them as you learn more through visits. For these, answer the “rights.” Who is the right solicitor, right natural partner, right gift amount, right cause, etc. For the next 50%, you may just put “ask X person to make introduction” by X date” and keep them on a list you will share with Physician Allies, Trustees or volunteers to help you get started.

Manage expectations of physicians and administrative leaders.



Our most important allies know very little about what we do every day, so we need to clarify our capabilities. For example, if the hospital president calls you in with Dr. X to discuss raising money for the Dr’s favorite project, you may leave there with them thinking you are on the hunt for donors and believe the goal is possible. Before agreeing to raise \$X for the project, explain you want to put a plan together and develop a qualified prospect list. You can’t conjure up interested donors if they do not exist, but hospital leadership doesn’t know that.

If all money is fungible, you should focus on the areas with the most prospect capacity.



Talk through the fundraising priorities of the hospital with leadership and share data on where the prospects are already engaged/interested. For example, if the hospital wants to raise \$X for something a bit obscure but you have the best prospects in cancer, perhaps they would fund the obscure project with the hospital budget and let you raise the funds for the cancer center's priorities. Aligning fundraising priorities with your prospects' interests is critical to success.

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