



LESSONS LEARNED

20 Years of Donor Stewardship

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Executive Director, Benefactor Program

Lyddy Lewis
Vice President, Major Gifts

Daniella Gorman, MSN, RN
Manager, Benefactor Program





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Agenda

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Hoag Benefactor Program Overview



Key Concepts

for building a successful non-medical concierge program



Identifying & Mitigating Organizational Risks



Importance of Policies & Procedures



Partnership with Development

hoag[®] Benefactor Program Overview

hoag[®] Hospital
Foundation

Benefactor Program

20

YEAR

ANNIVERSARY



- ✓ 10 Registered Nurses, 1 non-RN
- ✓ 100+ years of experience at Hoag
- ✓ Navigate Benefactors through the health care system within Hoag policies & procedures
- ✓ HIPAA Compliant
- ✓ No expedited care for donors
- ✓ Hotline answered 24/7/365
- ✓ 1,400+ Benefactors

Benefactor Experience

Personal Care Items
Referrals & Medical Records
Complimentary Valet Parking



COMFORTABLE CARE

Liaisons answer the hotline 24/7/365



Appointment Scheduling

For Hoag appointments, specialists, and HMG providers.



Emergency Department Assists

Liaisons communicate with ED clinicians, Benefactor, and family



Surgery Assists

Benefactors and families are liaised through the day of surgery



“No one has to be a Benefactor to receive excellent care at Hoag.”

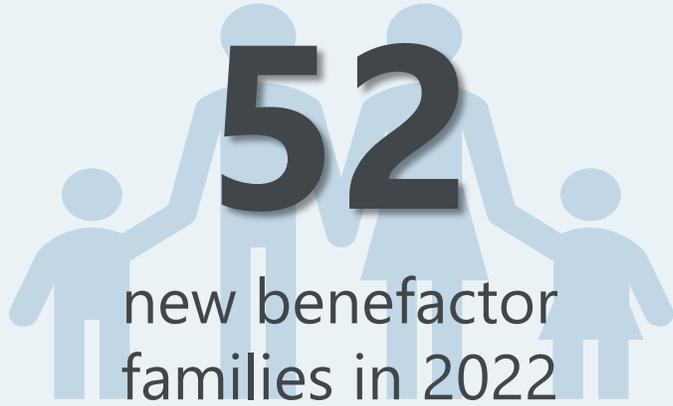
– Hoag Benefactor Liaison, RN

Benefactor Levels of Giving

Cultivation of Hoag Benefactors towards their next gift commitment

ADVOCATE \$250K Donor & Spouse, Children until age 24, Parents of donors	PHILANTHROPIST \$500K +4 adult children/spouse	VISIONARY \$1M+ +8 adult children/spouse	ANGEL \$2.5M +8 adult children/spouse + Limited Courtesy Assists	HUMANITARIAN \$5M+ +8 adult children/spouse + Unlimited Courtesy Assists
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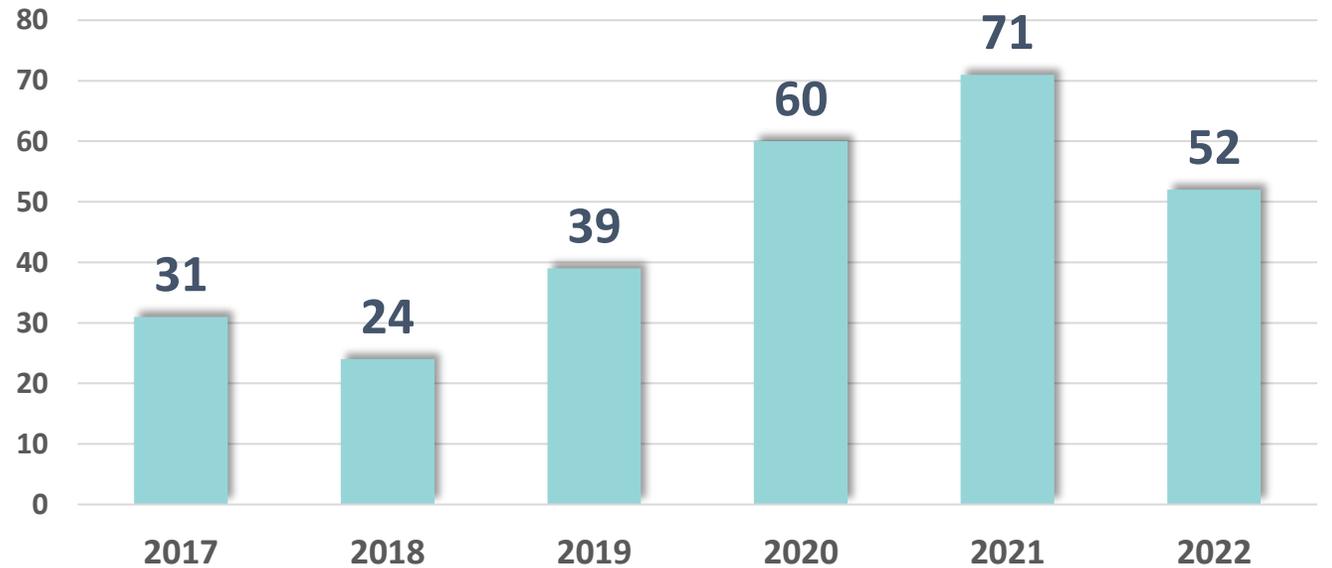
\$1M qualifying estate gifts are Advocate Level Benefactors



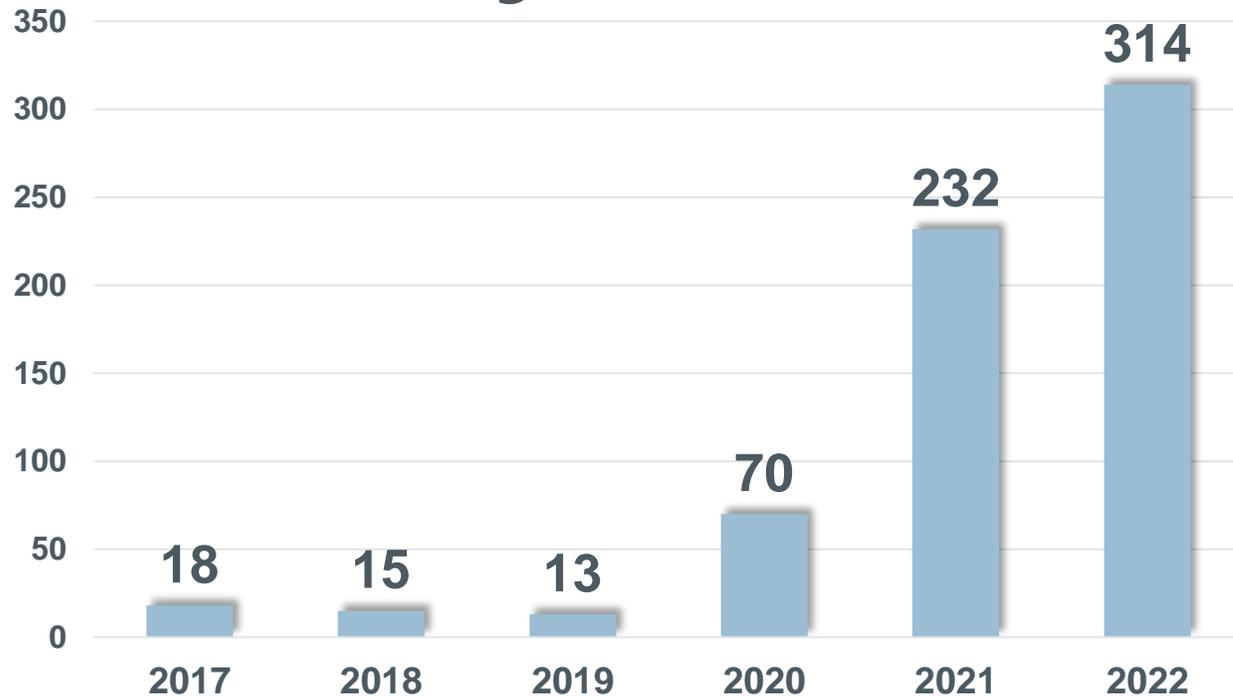
52
new benefactor
families in 2022

\$47,187,104

New Benefactor Families



Additional Gifts from Existing Benefactors



314

additional gifts from
existing benefactors in 2022

\$16,604,992



hoag.

Advocate Level Families (\$250,000-\$499,999):	345
Philanthropist Level Families (\$500,000-\$999,999):	67
Visionary Level Families (\$1,000,000-\$2,499,999):	39
Angel Level Families (\$2,500,000-\$4,999,999):	24
Humanitarian Families (\$5,000,000+):	25

Total Benefactor Families: 500
Total Individuals: 1,300



“Hoag Benefactor Liaisons do not provide clinical care. They help Hoag’s most generous donors navigate the health care system as a thank you.”

Key Concepts

FOR BUILDING A SUCCESSFUL
NON-MEDICAL CONCIERGE PROGRAM

Key Concepts

Who?

Who will be included?

What?

What will be offered?

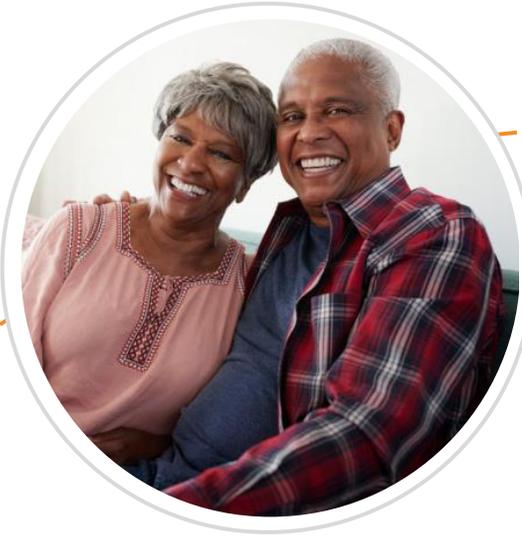
When?

**What hours of the day or night
will you offer your assistance?**

Where?

Where will donors be assisted?

Who will be included?



Donor Parents

Consider including parents at higher levels



Children

Until Age 24



Donors

Married or long-term commitment



Adult Children & In-Laws

Consider at higher levels

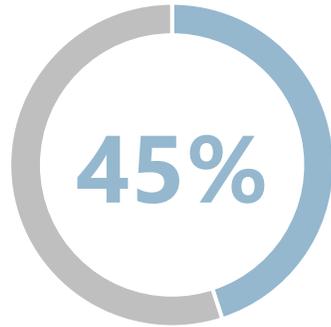
What will be offered?

Dependent on program staffing & when program is offered



Hospital Visits

Development or program staff to visit when inpatient



Appointments

Scheduling appointments for tests, labs, physician appointments; meeting donors for appointments



Surgery Assists

Personal assistance for surgery, private waiting area, hosted food & beverages



Emergency Department

Program staff or Emergency Charge Nurse

When will you offer assistance?

Consider the options and staffing prior to starting a program

24/7/365	Daytime	Evenings	Weekends
<p>Requires more staff</p> <p>Extensive scheduling & planning</p> <p>May not start out busy</p> <p>Will staff come in to assist from 10pm–7am?</p>	<p>Requires overlap of staff</p> <p>Day starts early, 5am or 6 am</p> <p>Day ends 6 pm</p> <p>Busiest time is mid-morning to evening</p>	<p>Evening staffing may be on call</p> <p>Evening calls are for Emergency Department Assist</p>	<p>Weekend staffing may be on call</p> <p>Inpatient Visits</p> <p>Weekend calls are for Emergency Department Assist</p>

Where will you assist donors?

Hospital/s

Meet donors for inpatient procedures, surgery or Emergency Department.



Outpatient Centers

Meet donors for outpatient testing, radiology or laboratory appointments.



Urgent Care

Meet donors at Urgent Care or offer to schedule appointments.



Physician Appointments

Meet donors at physician appointments or only case-by-case



Surgery Centers

Assist at surgery centers or notify leadership



Personalization to Donor Needs

Consider increased personalized assistance at higher levels of giving



How much is a qualifying gift?



Start with a high enough amount to make it a stretch for most donors



Think of the future; what amount will still be enough many years later?



How many donors have currently given the number you are considering and would be "Founders?"

Program Staffing

Will you begin with development staff? Administrative staff?
What benchmark will you set to hire clinical staff?



Registered Nurses

Registered Nurses are uniquely qualified to assist donors in navigating the medical system.

Hourly rates can seem expensive, but it is worth it for the knowledge and experience.



Hire from Within the Organization

Internal candidates are well-known. Choose employees with professional experience, good problem-solving, leadership, and excellent people skills.



Marketing/Communications Are Not the Same as Clinical Experience

People from many areas will apply to positions, but this is more clinical than marketing.

Who are your Leadership Champions?



Robert Braithwaite
President & Chief Executive Officer



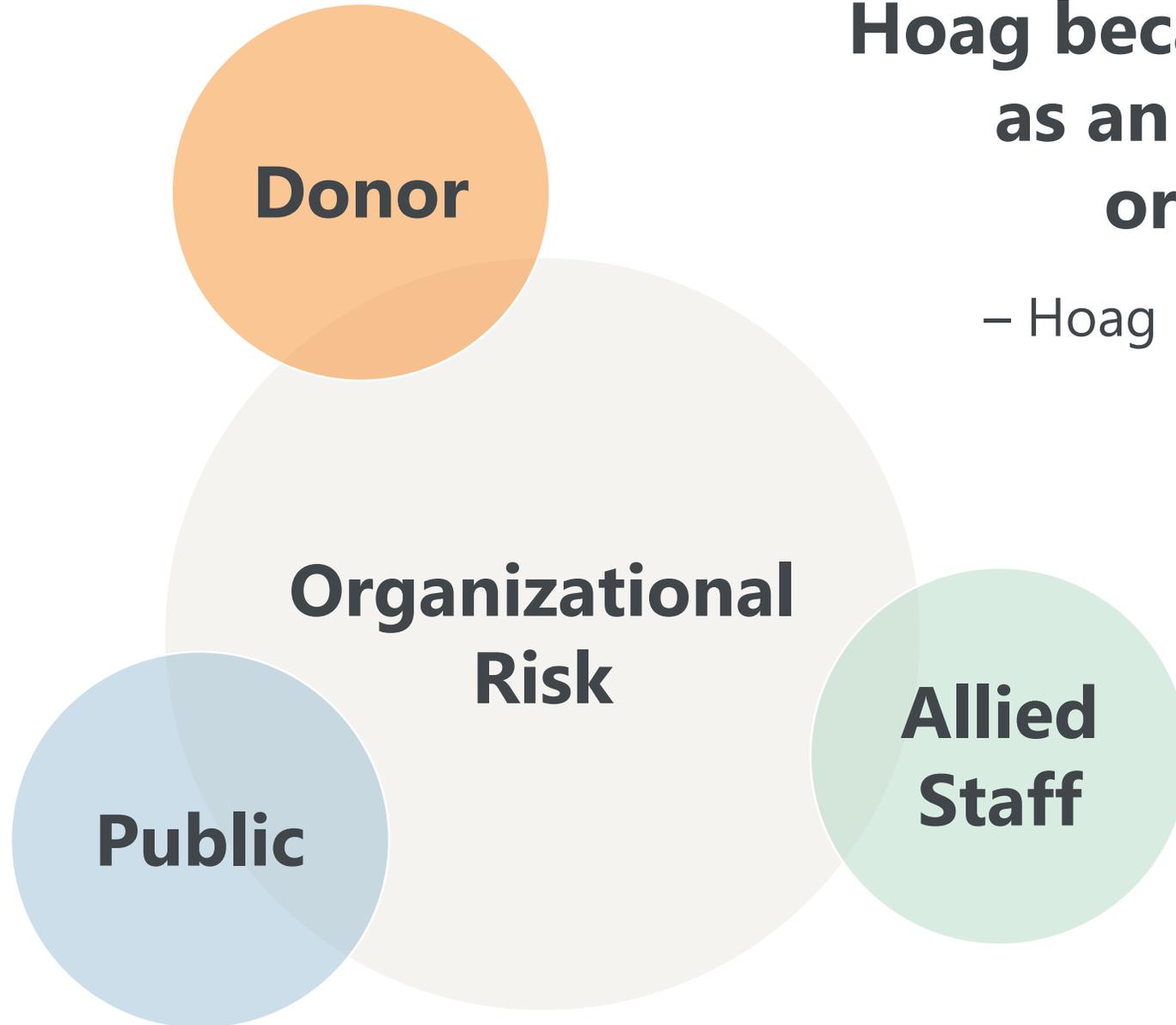
Andrew Guarni
Chief Financial Officer



Marcy Brown
Senior Vice President and
Chief Operations Officer

Organizational Risks

IDENTIFYING & MITIGATING



“I know you choose to support Hoag because Hoag operates as an ethical and fair organization.”

– Hoag Benefactor Liaison, RN

Organizational Risks



HIPAA



CONFLICT OF INTEREST



UNREALISTIC EXPECTATIONS



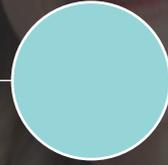
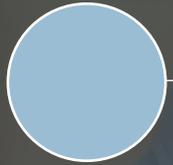
BEHAVIOR



COURTESY REQUESTS



POLICY



Compliance

**Patient
Privacy**

**Internal Donor
Communication**

**Sending Protected
Patient Information**

HIPAA Donor Health Care

Conflict of Interest

“They constitute a significant issue in that they affect ethics by distorting decision making and generating consequences that can undermine the credibility of the organization.”



Didier Cossin

Unrealistic Expectations



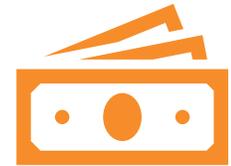
Expedited Care

#1 Misconception among donors:
Become a donor to cut the
line in Emergency.



Immediate Physician Appointments

Expectation for same-day
appointments with specialists



Free Health Care

Insurance fees waived
due to donor status



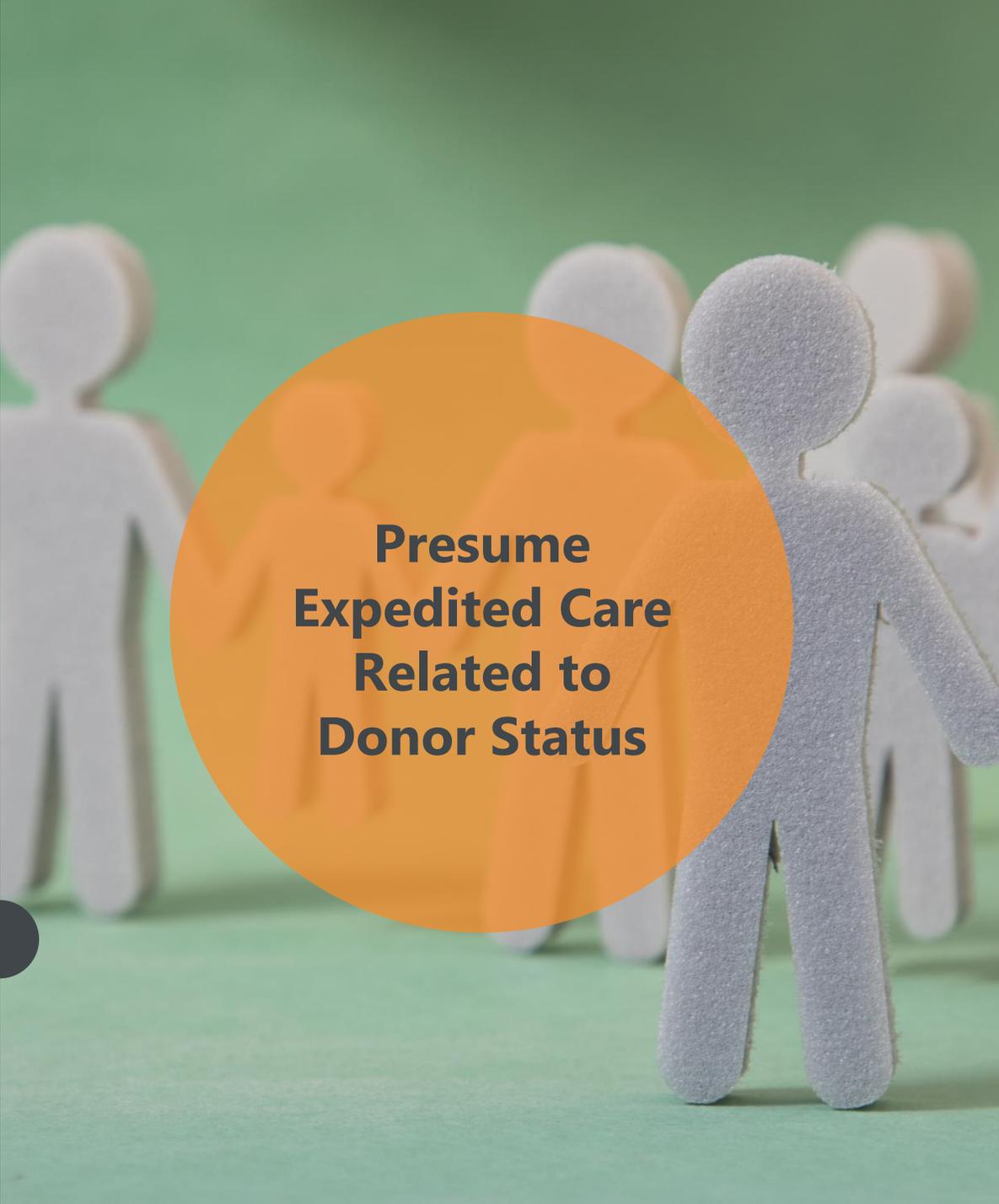
“We cannot expedite donor care in the emergency department. We work within the policies and procedures of Hoag. A person with chest pain is cared for before someone with a broken arm.”

– Hoag Benefactor Liaison, RN

Behavior

- Donors behaving badly
- Rude, disruptive, or inappropriate behavior
- Code of Conduct
- Steps to address disruptive behavior immediately
- Service recovery for clinical staff

Workplace Violence —●



**Presume
Expedited Care
Related to
Donor Status**



“Hoag can only offer the Benefactor Program with the partnership of the clinical staff. If Hoag Benefactors are disrespectful to clinical staff, it reflects badly on the Foundation and puts the program in danger.”

Courtesy Requests

"My friend is in the hospital and is having trouble with their doctor. Can you help them get a new doctor?"



Rob Smith
Benefactor

"My colleague needs a good Ophthalmologist; can you help them with an appointment?"



Jenelle Brown
Development Officer



Susan Jones
Foundation Board

"My family friend is in the emergency room and has been waiting forever, can you help them."



Cindy Brady
Benefactor

"I'm meeting with this donor soon and I'm SURE they will commit to a Benefactor gift. Can you assist them today?"

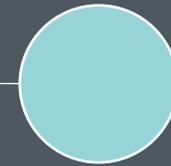
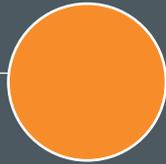
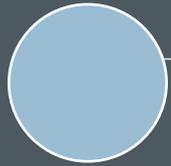


“I am receiving another call on the hotline and need to answer it. I will have my manager call you back to discuss your concerns.”



Patient Story

Policies & Procedures



**Hospital Policies
& Procedures**

**Internal Policies
& Procedures**

**Benefactor
Orientation**



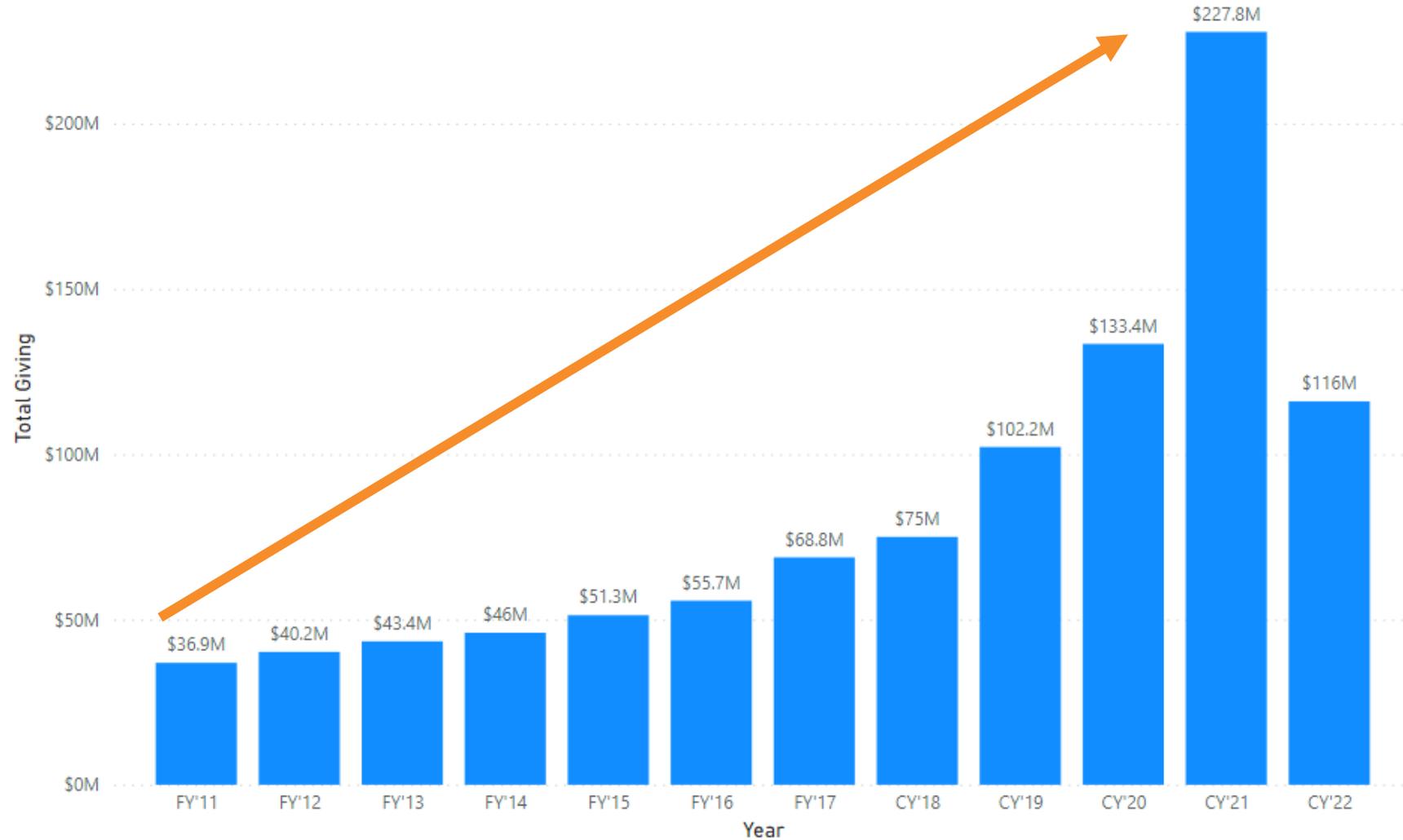
“We have a code of conduct to ensure Hoag Benefactors understand that inclusion in the program is dependent on courteous actions, words, and behavior.”

How the Program Benefits Development



Total Giving

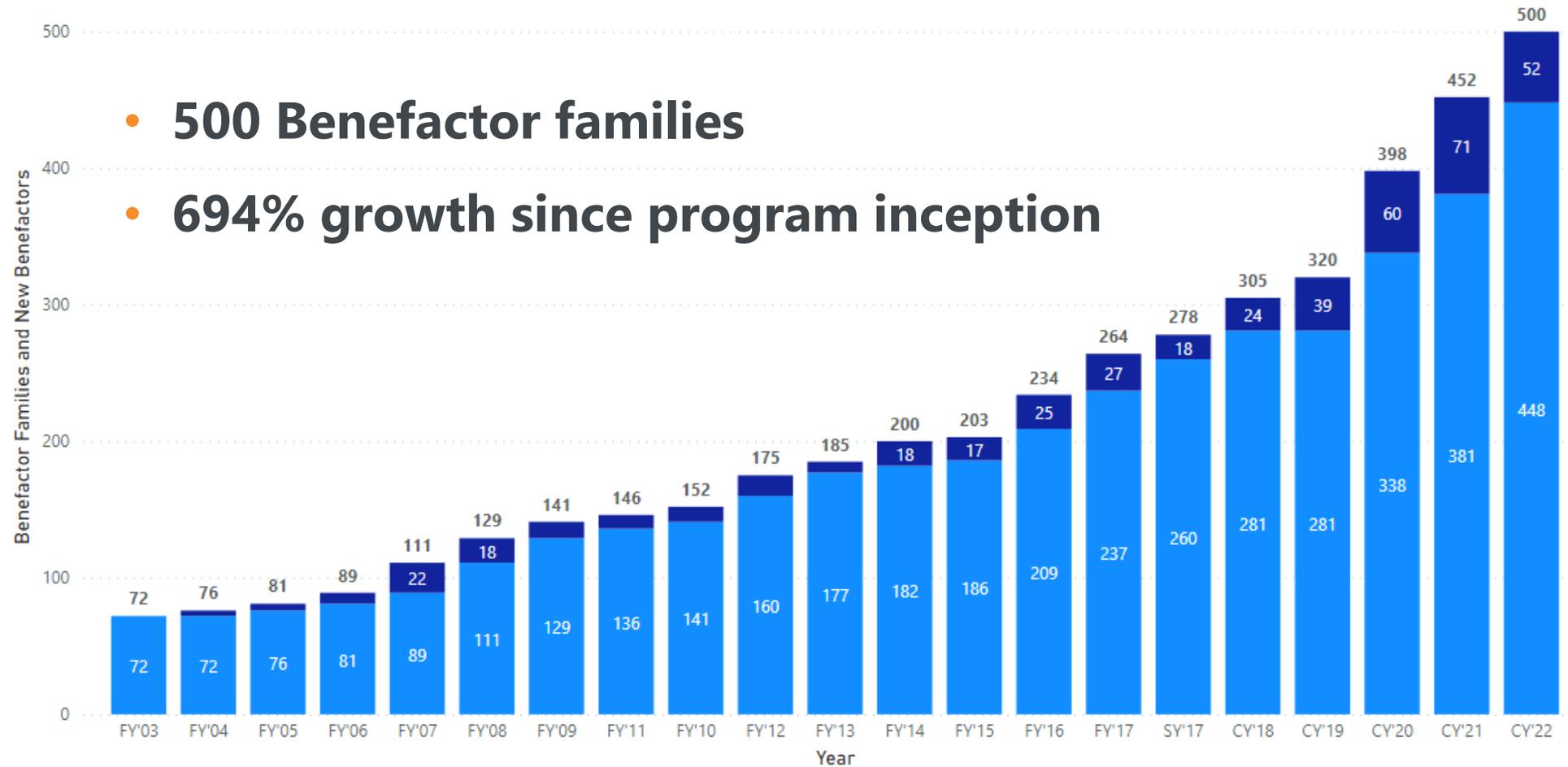
Total Foundation Giving



Benefactor Program Growth

Year Over Year Program Growth

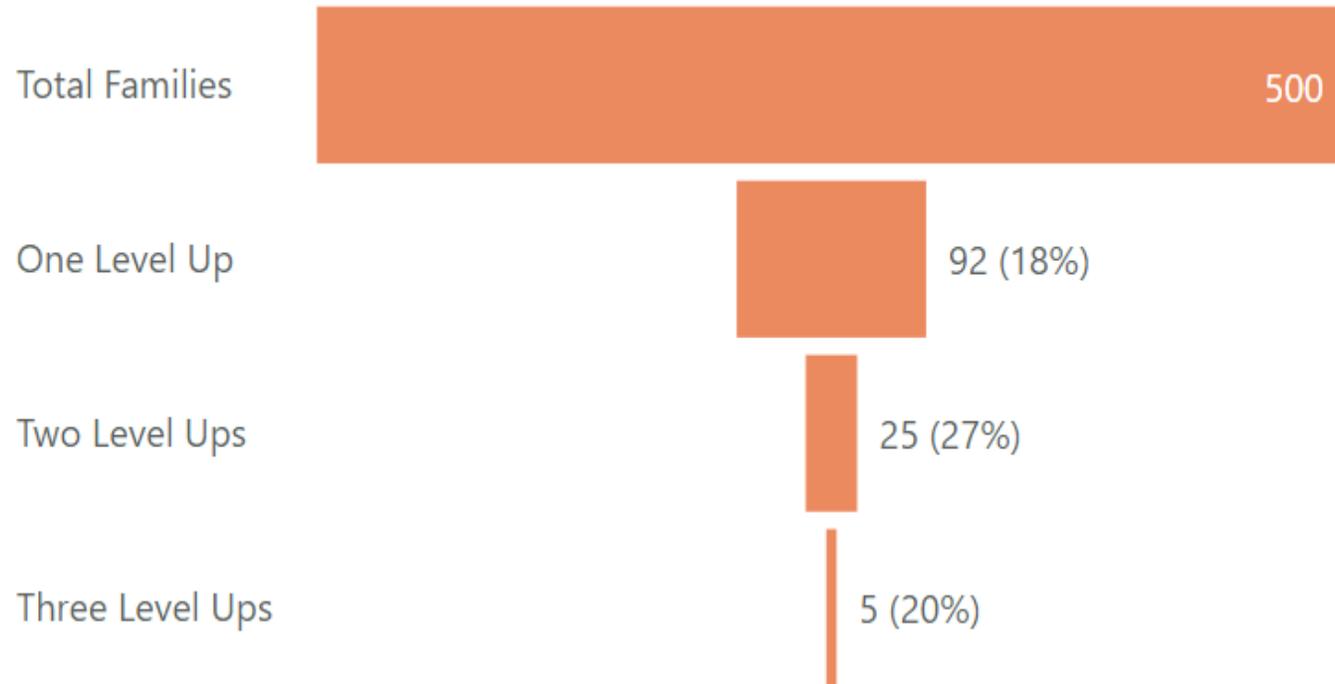
● Benefactor Families ● New Benefactors



- 500 Benefactor families
- 694% growth since program inception

hoag Hospital Foundation
Level-Ups

- ~**12** level-ups per year*
- ~**\$2.7M** of giving per level-up family
- **\$366.4M** total giving from level-up families

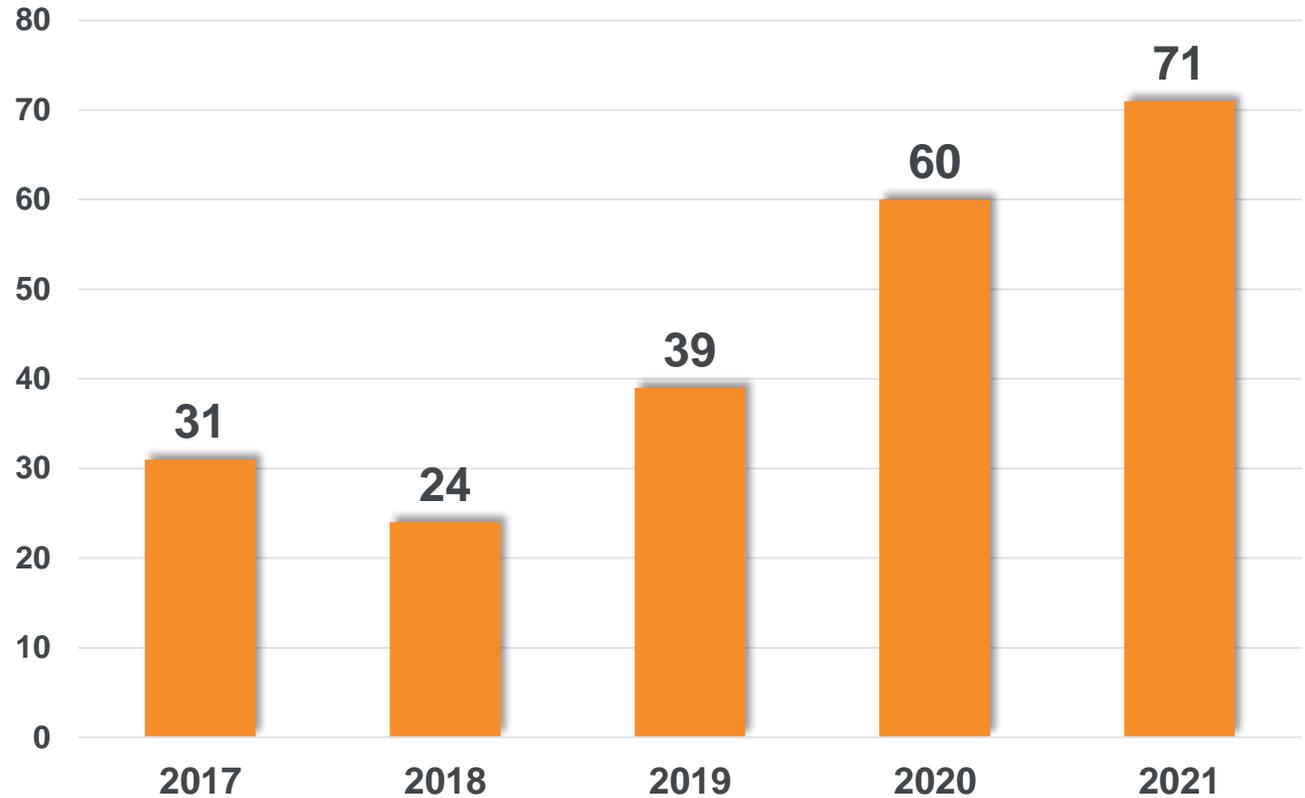


*Last five years



\$31,139,227

New Benefactor Families

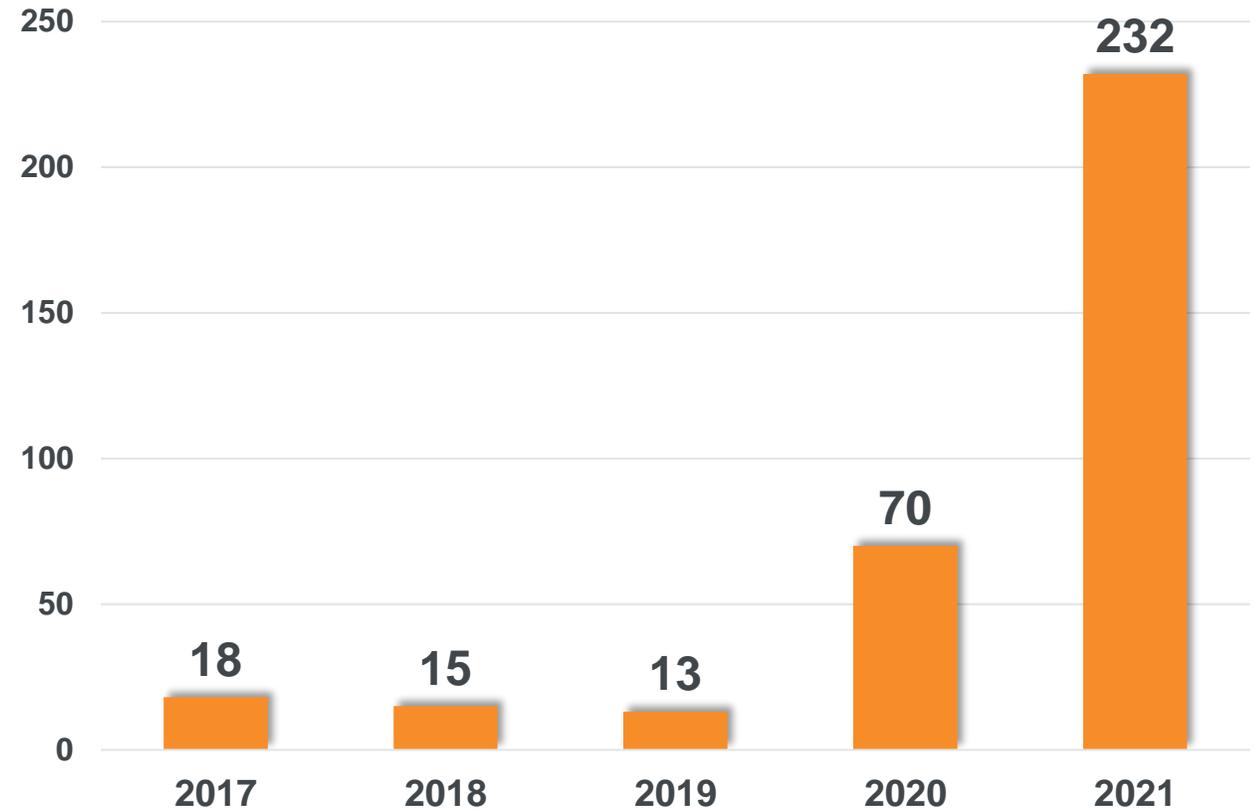


232

additional gifts from
existing benefactors in 2021

\$69,599,218

Additional Gifts from Existing Benefactors



A healthcare professional in a white coat is shown from the chest up, smiling and placing their right hand on the shoulder of a patient. The patient is seen from the back, wearing a grey sweater. The background is softly blurred, suggesting a clinical setting. The text "Compassionate Care" is overlaid in the center in a large, white, sans-serif font.

Compassionate Care

Questions?



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