



**DELAURO**  
AND ASSOCIATES

# **Strategic Development Assessment and Planning Study**

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# **STRATEGIC DEVELOPMENT ASSESSMENT AND PLANNING STUDY**

## **PROCESS**

Non-profit hospitals rely more than ever on philanthropic support to help fund their charitable missions and to provide resources for capital expansion and renovation.

Outstanding hospital and health system foundations achieve success by implementing a “balanced portfolio” of effective fundraising programs, building and maintaining efficient information systems, and developing a “culture of philanthropy” in which foundation board members, foundation staff members, and hospital and health system leaders and employees work in concert to identify and cultivate important donor relationships.

The purpose of the study is to obtain a thorough, independent, and objective evaluation of the foundation’s current fundraising programs, resources, organization, and effectiveness. The study will also identify opportunities for improvement, suggest appropriate goals, and lay out a strategic fundraising plan.

## **KEY OBJECTIVES**

A successful Strategic Development Assessment and Planning Study must achieve several key objectives:

1. Assess community support for other charities in the area, the competitive position of the foundation in securing charitable support, and project target growth potential for philanthropy in the foundation.
2. Evaluate and improve the foundation’s ability and capacity to help fulfill the objectives of the hospital or health system in ways that are compatible with and in furtherance of the organization’s mission.
3. Assess the capability, effectiveness, and satisfaction of volunteer leaders in guiding the fundraising effort and make appropriate recommendations concerning volunteer training, recruitment, or governing processes.
4. Assess the capability, effectiveness, management processes, and satisfaction of development staff and make appropriate recommendations concerning staff training, recruitment, or functioning.

5. Provide recommendations for improvement in all areas and begin to build consensus with volunteers, staff, and administration around a tactical plan for fundraising improvement and growth.
6. Provide recommendations for staffing and programmatic changes to reach recommended growth targets over a 3 – 5 year period.

## **STUDY PHASES**

DeLauro and Associates conducts Strategic Development Assessment and Planning Studies in three phases:

### ***Phase 1 – Preparing for the Study***

In preparation for the study, DeLauro and Associates focuses on the following activities:

1. Consult with key staff and volunteers to outline the study process, define roles, and establish timelines for the study
2. Conduct a comprehensive review of the foundation's fundraising information, marketing, and communications material, and other relevant documents
3. Conduct a philanthropic potential analysis using IRS charitable gift deduction data in the hospital or health system's service area zip codes to estimate the fundraising capacity of the institution(s) in the markets they serve
4. Provide the following:
  - Guidance on scheduling consultant interviews
  - Interview Appointment Grid
  - Sample 'Interview Appointment Confirmation' letter and 'Thank You' letter
5. Develop questions for individual interviews and surveys.

A Planning Committee consisting of about 6 - 8 board members and administrative leaders is formed to guide the planning process. This Committee may include members of the foundation and hospital boards and administrative leaders.

Responsibilities of the Strategic Development Planning Study Committee:

- Select key individuals to be interviewed
- Review interview and survey questions
- Assist in the scheduling of the selected individuals for a representative of DeLauro and Associates to interview
- Review the Study findings, conclusions, and recommendations and carry these forward to the foundation board.

## ***Phase 2 – Conducting the Interviews and Survey***

DeLauro and Associates will conduct confidential one-on-one interviews with key individuals selected by the leadership of the foundation and the Strategic Development Planning Study Committee.

*It is important to note that these are confidential interviews asking the interviewees' opinions of the hospital or health system, its facilities, and the foundation. At no time will there be any solicitation of interviewees during the interview or as part of the process.*

In addition to the personal interviews, a survey will be constructed of questions similar to those used in the interviews. The survey will be available online to additional individuals to be selected by the Strategic Development Planning Study Committee. The survey can be offered to board members, donors, administrative or community leaders who could not be scheduled for individual interviews.

## ***Phase 3 – Report and Recommendations***

Foundation and hospital or health system leadership will receive a report that objectively summarizes the study findings. A preliminary PowerPoint report presentation will be made to the foundation board summarizing the findings and recommendations. Based on the discussion, the final report will be modified and edited to incorporate any additional ideas or emphasis revealed during the presentation to the board.

The final report will present both a statistical analysis and summary of interviewee and survey respondents' responses to key questions regarding the image, reputation, and opportunities for the foundation including anonymous quotes and anecdotal representations meant to accurately characterize key findings. The report will also include DeLauro and Associates':

- **Executive Summary** - Presenting a condensed version of the entire study suitable to be mailed to all participants who provide input
- **Analysis** - Including benchmarking with organizations of similar size in similar communities
- **Recommendations** - A proposed plan of action and appropriate goals in the areas of *Image & Appeal, Volunteer Leadership, Fundraising Programs, Staffing, Infrastructure & Management Systems, and Donor Base & Growth Potential*. Recommendations for growth targets in the fundraising program will also be included. Other issues may be added after meeting with staff and the volunteers.

Conducting a Strategic Development Assessment and Planning Study is an important process designed to assess the fundraising potential of the institution

and to recommend a plan of action to maximize a foundation's ability to reach that potential. As a result of this process, detailed recommendations are developed to ensure that the organization and its foundation have all fundamental processes, communication systems, and programs in place to maximize its likelihood of growth and success in the immediate and long-term future.

Every element of our studies is a collaborative effort between DeLauro and Associates and foundation staff. The primary sources of data for the study include existing organization reports and records, program analysis templates developed by DeLauro and Associates, individual interviews with key constituents, and an online survey of key constituents not able to be interviewed.

