



PHILANTHROPY MASTER CLASS

FEBRUARY 28, 2023

A promotional graphic for a "Philanthropy Leadership Master Class". It features four circular portraits of speakers at the top: Bill Littlejohn, David Flood, Randy Varju, and Susan Doliner. Below them, the text "PHILANTHROPY LEADERSHIP MASTER CLASS" is prominently displayed in white. To the right, it says "HOSTED BY EDDIE THOMPSON" in red and white. At the bottom left, the date and time "TUES, FEB 28 // 10:30 AM CENTRAL" are listed in red. A fifth circular portrait of Eddie Thompson, the host, is located at the bottom right.

Bill Littlejohn

David Flood

Randy Varju

Susan Doliner

**PHILANTHROPY
LEADERSHIP
MASTER CLASS**

HOSTED BY
EDDIE THOMPSON

TUES, FEB 28 //
10:30 AM CENTRAL

MASTERS IN PHILANTHROPY LONGEVITY



Eddie Thompson, Ed.D., FCEP
Thompson & Associates



Bill Littlejohn
Senior VP and CEO //
The Foundations of Sharp
HealthCare



David Flood
Senior VP & Chief
Development Officer
President //
Intermountain Foundation



Randy Varju
Foundation President and
Chief Development
Officer //
AdvocateAurora Health



Susan Doliner
Vice President of
Philanthropy // Maine
Medical Center



Our Philanthropy Master Class Discussion

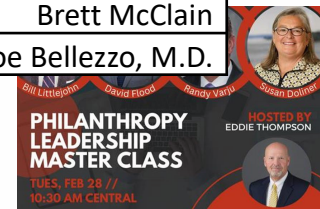
The economic, social and philanthropy landscape has changed dramatically in the last decade. Philanthropy strategy, donor acquisition and retention, multiple engagement platforms and the dramatic need for talent and professional development are priorities across the industry.

- The challenges and opportunities of philanthropy leadership in 2023
- The characteristics of high-performing professionals
- The importance of tenure
- Being the driver of an institutional culture of philanthropy – and leading a high performing fundraising team and program
- Creating a professional pathway and journey - Collaboration, mentoring and sharing with others



FOUNDATION BOARD AGENDA

12:00	Call to Order/Chair's Remarks	Joe Bellezzo, M.D., <i>Chair</i>
12:05	Story of Inspired Giving <ul style="list-style-type: none"> Alice Sosa Bonner & Fadi Nicolas, M.D. 	Bill Littlejohn, Senior VP & CEO
12:15	Report of the Foundation CEO: <ul style="list-style-type: none"> First Quarter FY 2022 Two Year Perspective Updates 	Bill Littlejohn
12:25	ENVISION Report	Bill Littlejohn & Beth Morgante, VP
12:35	Life Estate Gift Update	Linda Spuck
12:45	Report of the Sharp Philanthropy Teams: <ul style="list-style-type: none"> Annual Giving 	Ben Moraga, VP & Brianna Lee
12:55	Consent Agenda (APPROVAL REQUIRED): <ul style="list-style-type: none"> Minutes of the regular meeting of November 2021 (<i>enclosed</i>) Chair's Report (<i>enclosed</i>) Standing/Advisory Committee Reports: <ul style="list-style-type: none"> Finance Committee (<i>Financial report enclosed</i>) Sharp Rees-Stealy Philanthropy Sharp Chula Vista Foundation Advisory Board Stewardship Committee Unrestricted Distribution FY22 Recommendations (<i>enclosed</i>) <i>Board Resolution Transfer (new item)</i> 	Joe Bellezzo, M.D. Paulette Roberts, <i>Treasurer</i> Mike Martin, M.D. Cheryl Cox Lisa Arnold, <i>Vice Chair</i> Bill Littlejohn Bill Littlejohn
1:10	Report of the Sharp HealthCare President and CEO	Chris Howard
1:20	Report of the Sharp HealthCare Executive Vice President and COO	Brett McClain
1:30	Adjournment	Joe Bellezzo, M.D.



STORY OF INSPIRED GIVING

Bonnie Adams

- Bonnie Adams – who turned 90 in 2021 -- established a \$50,000 Charitable Gift Annuity for ENVISION – Prebys Innovation & Education Center. Bonnie described her experience in making the gift as "fun!" and said she is so happy to be in a situation where she can support Sharp at this level
- Bonnie was deeply touched with tears in her eyes when she learned that the PIEC 2nd Floor Staff Lounge would be named in honor of her and her late husband Steve Adams, who worked at General Dynamics – the site of the PIEC. A true legacy gift and a special day to ring the bell.



SENIOR OFFICER FOR PHILANTHROPY

I am the senior officer for philanthropy:

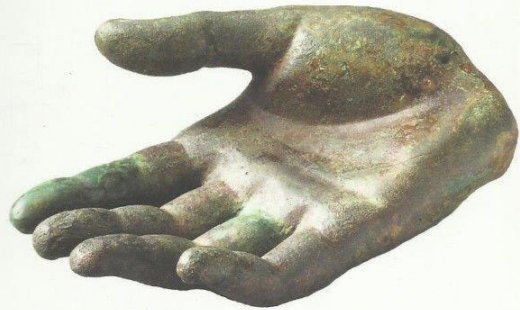
- For the largest health care provider in San Diego.
- That touches the lives of more than one million San Diegan's a year.
- That is San Diego's largest private employer with more than 19,000 team members.
- Whose national reputation for excellence is due, in large measure, to the skill, compassion and expertise of our dedicated caregivers, and the generous support of the San Diego community.
- **Sharp's Resident Historian**



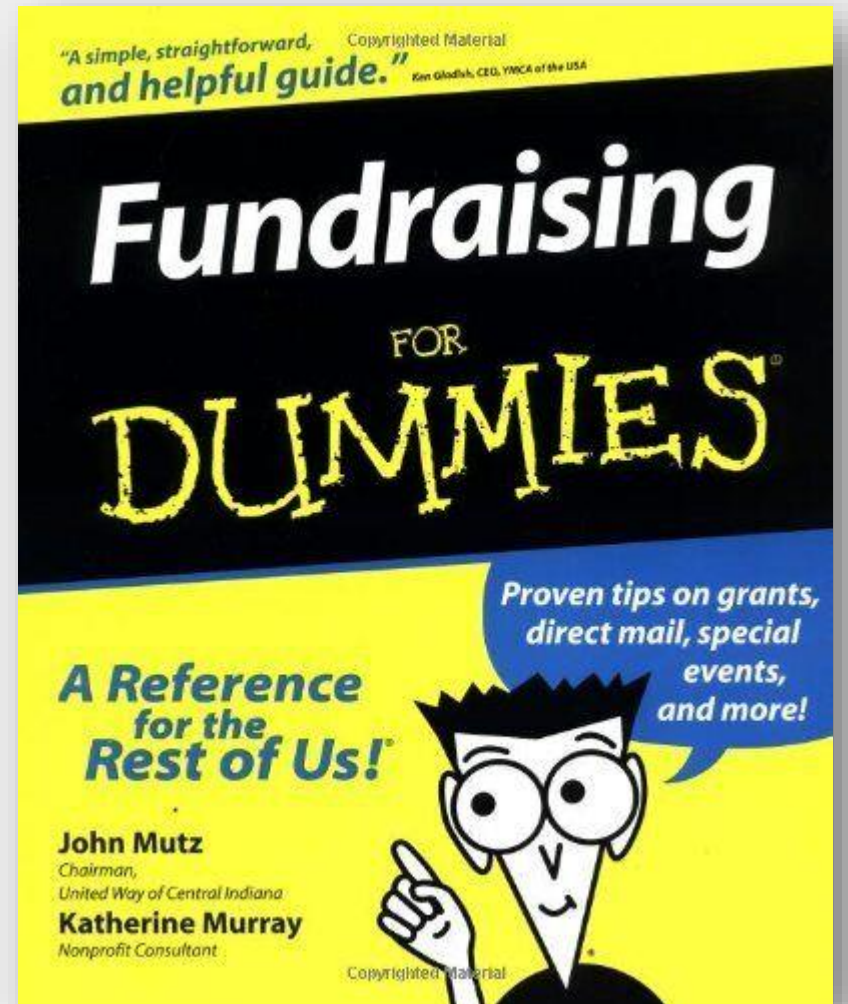
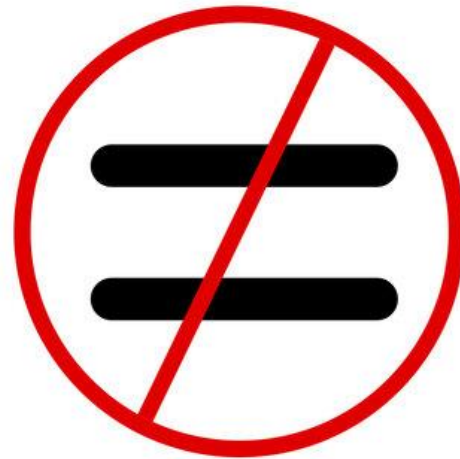
LAPHAM'S QUARTERLY

VOLUME VIII, NUMBER 3

SUMMER 2015



PHILANTHROPY



'Collapse' in Small Gifts Poses Threat for Nonprofits as Recession Looms, Report Says

A CHALLENGING ENVIRONMENT



THE CHANGING DYNAMICS OF GIVING ARE YEARS IN THE MAKING

Fewer millennials own homes, get married or go to church. Will they still give to charity?

For the first time in nearly two decades, only half of U.S. households donated to charity in 2018, [according to a 2021 study](#) by Indiana University's Lilly Family School of Philanthropy.

20 Million People Stopped Giving to Charity

America's Coming Charity Deficit

Young people aren't attached to religion, which could augur ill for their future giving.

LEADERSHIP
MASTER CLASS

TUES, FEB 28 //
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Stock market losses wipe out \$9 trillion from Americans' wealth

PUBLISHED TUE, SEP 27 2022 • 12:57 PM EDT | UPDATED TUE, SEP 27 2022 • 7:37 PM EDT



Robert Frank
@ROBTFRANK

SHARE    

2022
Was
Fun...



The Chronicle of Phi...  · 17m :
Fundraisers Band Together to Find
Practical Solutions to the Giving
Crisis




philanthropy.com
Fundraisers Band Together to
Find Practical Solutions to the ...



Quarterly Fundraising Report™

Year-to-Date Nonprofit Sector Trends
Q3 2022 (JAN 1, 2022 - SEP 30, 2022)

 Key Definitions

Key Insights

- Total dollars fundraised are up 4.7%
- Smaller donors are contributing fewer dollars in 2022 than they did in 2021
- Donors are down -7.1% from 2022 compared to 2021.
- Donors being down in the third quarter is a pattern that continues from 2021.
- There are large decreases in overall donor counts
- Decreases in overall donor counts are driven by weaker acquisition rates as well as lower retention of new donors.



DONORS

-7.1%
(+/- 2.0%)
YOY change



DOLLARS

4.7%
(+/- 2.0%)
YOY change



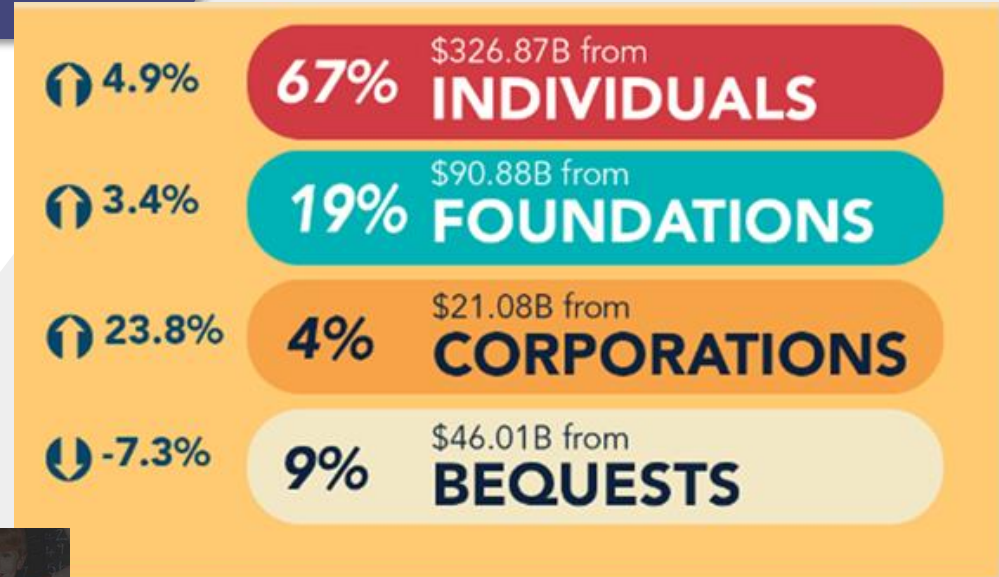
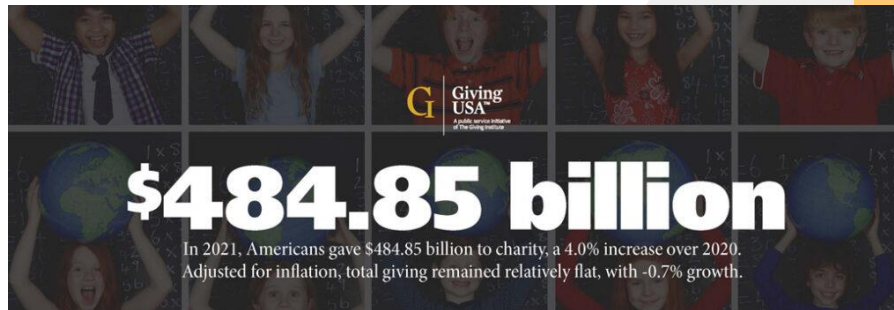
RETENTION

-3.1%
(+/- 1.0%)
YOY change

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10

WHAT DO WE MAKE OF THIS?

- Religion is always #1 – 27% of Giving (was 46% 40 years ago)
- In 1982, there were 300,000 registered charities in the report, today there are more than 1.8 million, a 6x increase.
- Total giving in 1982 represented 2.9% of GDP, in 2022 it is 2.1% of GDP, actually a decline
- Growth in philanthropy is at the top

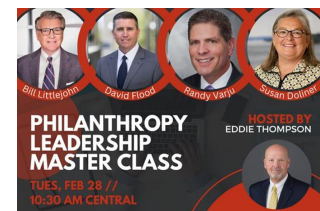


ENVISION
The Campaign for Sharp HealthCare

\$88,000,000



PHILANTHROPY AS STRATEGY



STRATEGIC PHILANTHROPY IS NOT JUST FUNDRAISING...IT IS PHILANTHROPY AS TRANSFORMATION



When Philanthropy is Strategic, It is Built Around the Concept of the Ability to Help Transform the Institution or Achieve a Vision, Not Just Fill a Need



GIVE
PARTICIPATE
ENGAGE
CHAMPION
COLLABORATE
STEWARD

BOARD AND LEADERSHIP
ENGAGEMENT IN
PHILANTHROPY

Elevating Philanthropy at Sharp

As a not-for-profit health care system, philanthropy touches every aspect of Sharp HealthCare. Our three foundations support the programs and services of our esteemed medical centers and specialty hospitals, enabling Sharp to provide the highest quality care for our patients.

As board directors, you serve as community advocates for our foundations and for Sharp HealthCare. Here are ways you can help elevate philanthropy for Sharp programs and services.



For more information, visit give.sharp.com.



PHILANTHROPY AS A DRIVER OF INVESTMENT IN HEALTH CARE

SHARP Five-Year Operating, Cash, and Capital Plan
For Each of the Five Years Ending September 30, 2027
Sharp HealthCare | Finance Committee | March 21, 2022

Philanthropy as Investment

Five-Year Financial Roadmap to One Sharp

Investments in the community allow for growth and financial stability with a continued focus on operating improvements

- Income from Operations target of 2.5% 2023; 3.0% 2024-2027
 - Requires annual operating improvements of \$63.5 million in 2023, \$37.8 million in 2024, and \$13.3 million in 2025, **totaling \$114.6 million through the three-year period**
- Capital expenditures of \$1.6 billion during the five-year period
 - Epic implementation
 - Virtual, ambulatory, and hospital capacity initiatives
 - \$300.0 million tax-exempt financing forecasted in 2023
 - \$126.1 million projected in philanthropic support
- Balance sheet measures continue to strengthen
 - By 2027, days cash on hand at 439.5 with modest debt to cap of 13.4%

The Three Legs of the Stool

The five-year plan is contingent upon several imperatives

- Stabilized operations in fiscal 2023
- Continued emphasis on cost management and efficiency
- On time and on budget Epic implementation
- Identifying and implementing financial improvements
- Returns on investment from strategic initiatives
- Strong philanthropic support

Institutional Priority



Philanthropy as Institutional Strategy and Investment

The San Diego Union-Tribune

Sharp Healthcare to launch \$2 billion, 10-year building program



A rendering of a new emergency and trauma expansion at Sharp Memorial Hospital in the San Diego neighborhood of Serra Mesa. (Sharp Healthcare)

Effort begins with Memorial hospital expansion and additions to emergency and trauma units

BECKER'S HOSPITAL REVIEW [Subscribe](#)

Sharp HealthCare launches \$2B construction project

Marissa Plescia (Twitter) - 2 days ago

Save Post Tweet Share Listen Text Size Print Email

San Diego, Calif.-based Sharp HealthCare kicked off its \$2 billion capital improvement plan with its May 26 groundbreaking for Sharp Memorial Hospital's Cushman Emergency and Trauma Center.

The emergency and trauma center is the first phase of the capital projects, according to a Sharp HealthCare news release. The groundbreaking also signals the start of a \$250 million fundraising campaign for advancements at its corporate headquarters, regional medical centers and specialty hospitals. So far, \$86 million has been raised for the campaign, called "Envision: The Campaign for Sharp HealthCare."

The expansion of the emergency and trauma center will add 31 treatment rooms, a new CT room and two specialized rooms for patients with contagious diseases.

Later phases include a new 152-bed patient tower at Sharp Memorial Hospital and 15-bed expansion at Sharp Mary Birch Hospital for Women & Newborns.

HEALTHCARE: EXPANSION AT SERRA MESA HOSPITAL PART OF 'ENVISION'

Sharp Launches Funding Campaign at Groundbreaking

By Jeff Clemetson

Friday, May 27, 2022

Like 0 Share LinkedIn Share Tweet



Rendering of the Cushman Emergency and Trauma Center expansion at Sharp Memorial Hospital in Serra Mesa. Image courtesy of Sharp HealthCare.

Sharp HealthCare is already bringing its "ENVISION" to life.

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SO, WHAT ACTUALLY DO WE DO AS PROFESSIONALS?



WE ALL HAVE THE SAME JOBS: IT'S HOW WE ALLOCATE OUR TIME – AND WHERE – IN-PERSON OR VIRTUAL



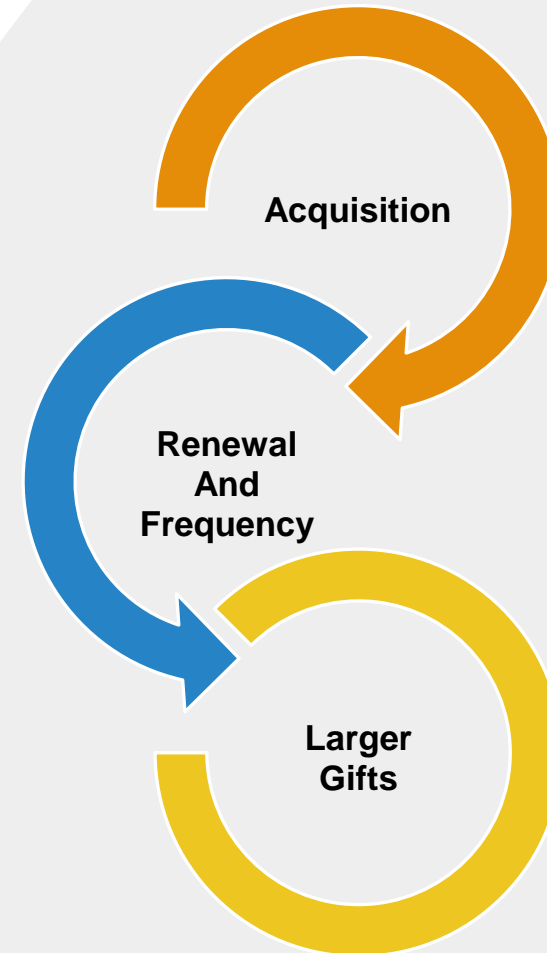
THE CYCLE OF HIGH PERFORMANCE AND A PROFESSIONAL PATHWAY

Build Upon the Characteristics of High Performance



THE THREE FUNDAMENTAL FORCES OF FUNDRAISING

- Acquire new donors
- Have existing donors make additional and/or more frequent gifts
- Have both new or existing donors make larger gifts (give more than previous new donors or their own previous gift)

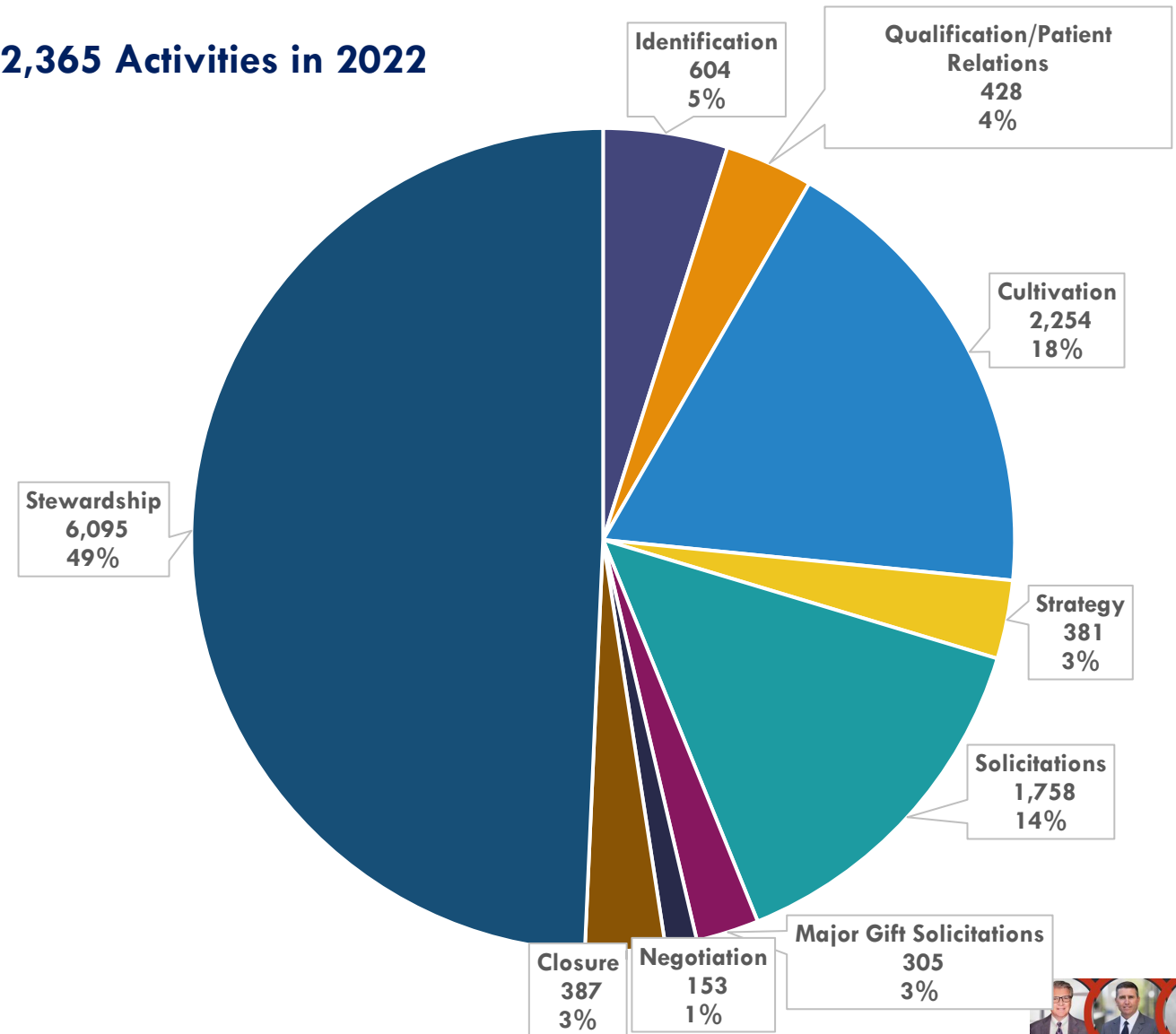


WHAT DO WE DO?

Donor Development and Management

- Most of our time and work is a rigorous, disciplined focus on **“MOVES” Management** – moving the donor or prospect along a path of moves to achieving the maximum solicitation dynamic.
- Major gift solicitations are only 3 percent of the moves, yet represent 80 percent of the funds raised – think we need to do them well?

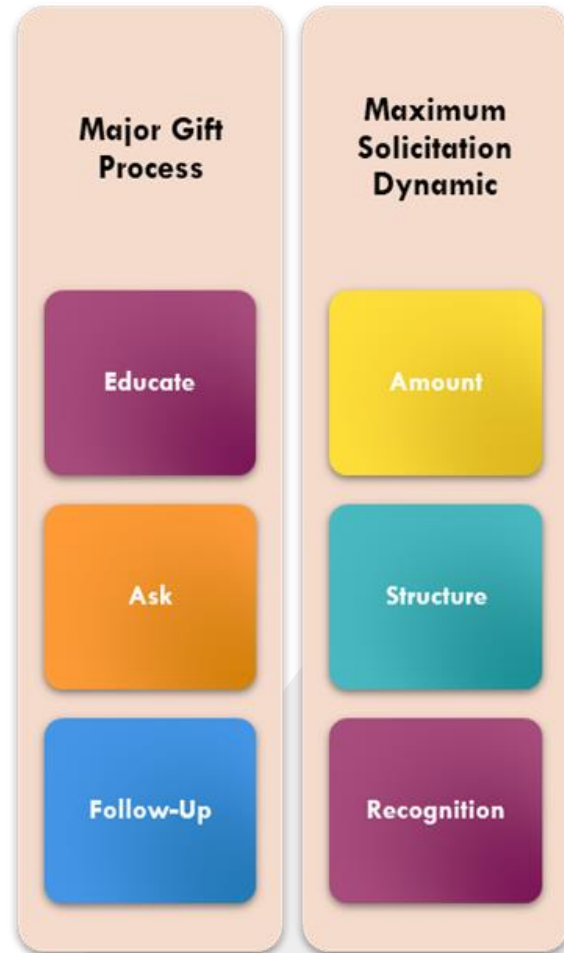
12,365 Activities in 2022



ATTENTION TO DETAIL

It's not just MOVES
Management and tracking the total, it's the effectiveness and attention to detail of the major gift process.

High performance major gift work is not the number of solicitations or even closed gifts but achieving the maximum solicitation dynamic.



TRANSFORMING HEALTHCARE IN SAN DIEGO GIFT APPROACH PROCESS CHECKLIST

- Make your own **pledge first!**
- Select** your prospects to approach
- Make sure you have attended a **training** session
- Contact** your prospect with either a phone call or letter
- Invite** prospect to attend a **briefing**
- Schedule** the briefing with the prospect. Contact Marsha Lubick at the Foundation office (818) 902-3914 to inform her when the briefing is scheduled.
 - Arrange for **transportation** if necessary
 - Distribute** campaign **brochure** at briefing
- Before** the gift solicitation:
 - Choose a partner** (other cabinet member, volunteer or staff) to go with you on the gift approach call.
 - Meet or discuss** over the telephone with campaign staff the gift approach process
 - Who will take the **lead**
 - What **range of gift** to ask prospect to consider
 - Specific **talking points**
 - Naming** opportunity
 - Written proposal** if necessary
- Contact** prospect to arrange gift approach meeting
- Conduct gift approach** (use your notes!)
 - Ask** for a specific amount or range for prospect to consider
 - Offer** Naming Opportunity
 - Provide** Tax Advantages
 - Offer** written proposal (if appropriate)
 - Set** specific time for follow-up
- Conduct **follow-up**
 - Get pledge decision**
 - Complete** Pledge Card and **Return** pledge card to Foundation office
 - Gift approach **debriefing** with campaign staff and follow-up as necessary
- Congratulations! You've done your job!**

PEOPLE SKILLS -- WE MUST BE BOTH DONOR AND ALLY CENTRIC

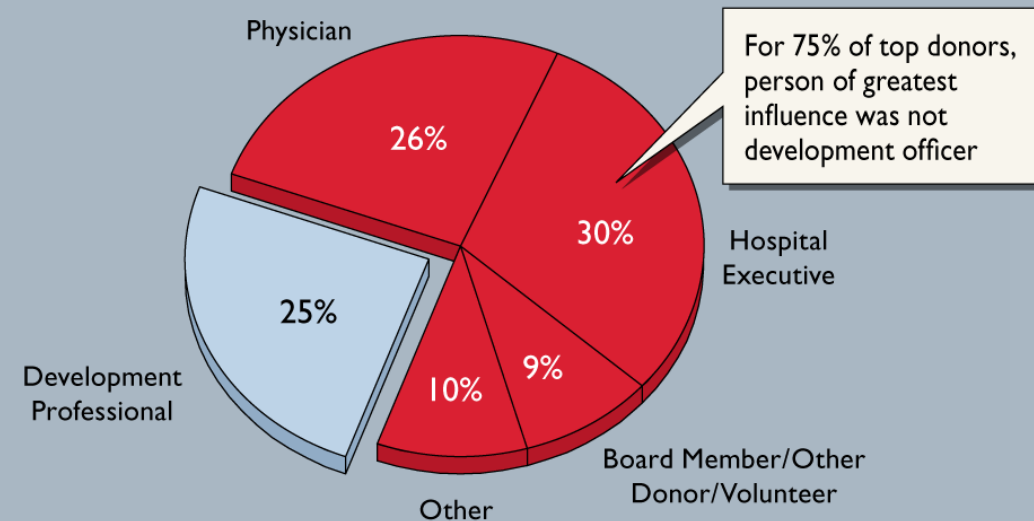
In health care philanthropy, studies have shown that hospital executives, physicians and Board members have the greatest influence on major gifts. Important to facilitate those allied relationships.

A Relatively Small Piece

Person with Greatest Influence on Donor Relationship

From the Survey of Top Gifts Completed by Development Officers

n=147 gifts



© 2006 • The Advisory Board Company



San Diego Stronger Together

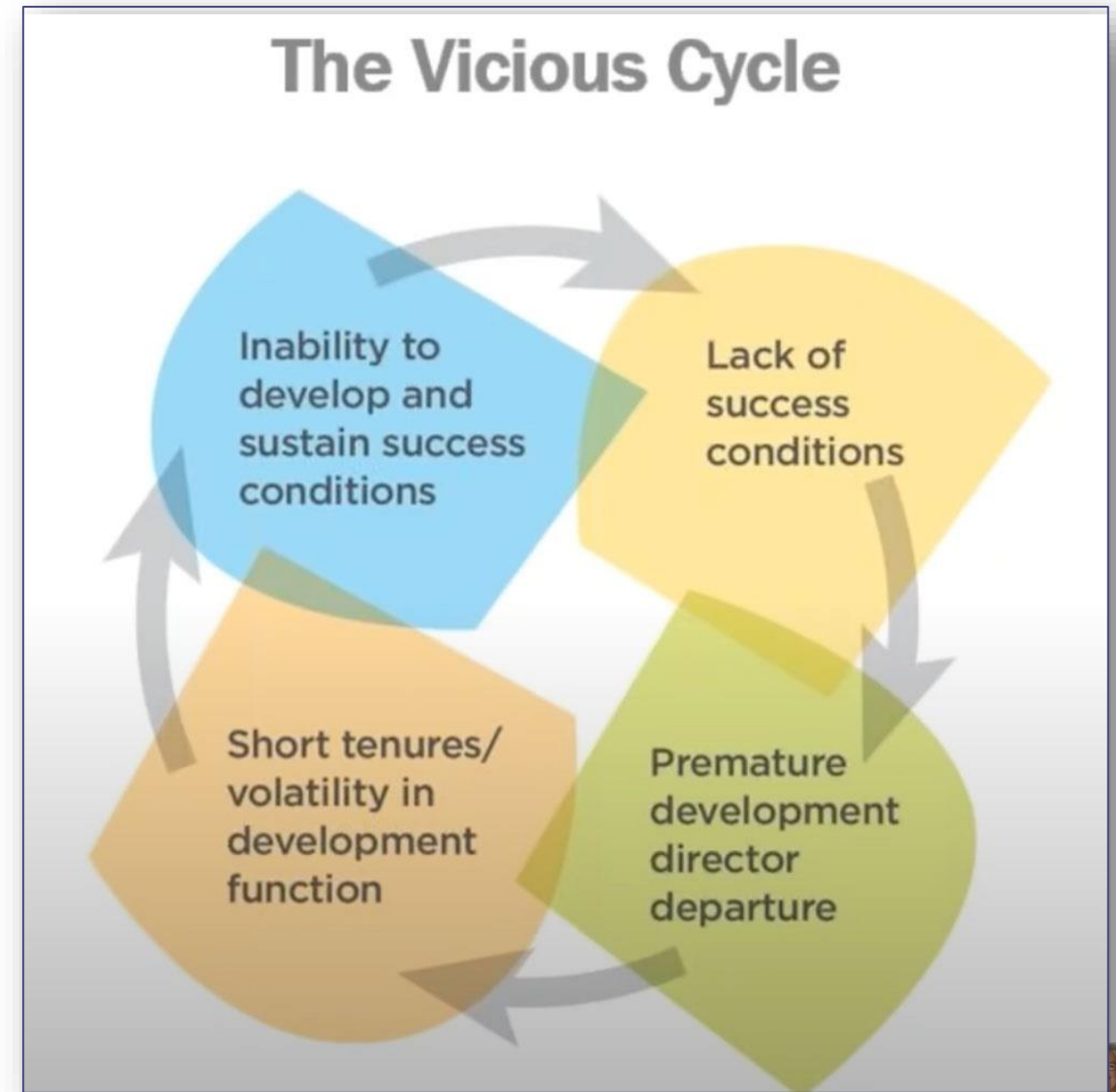
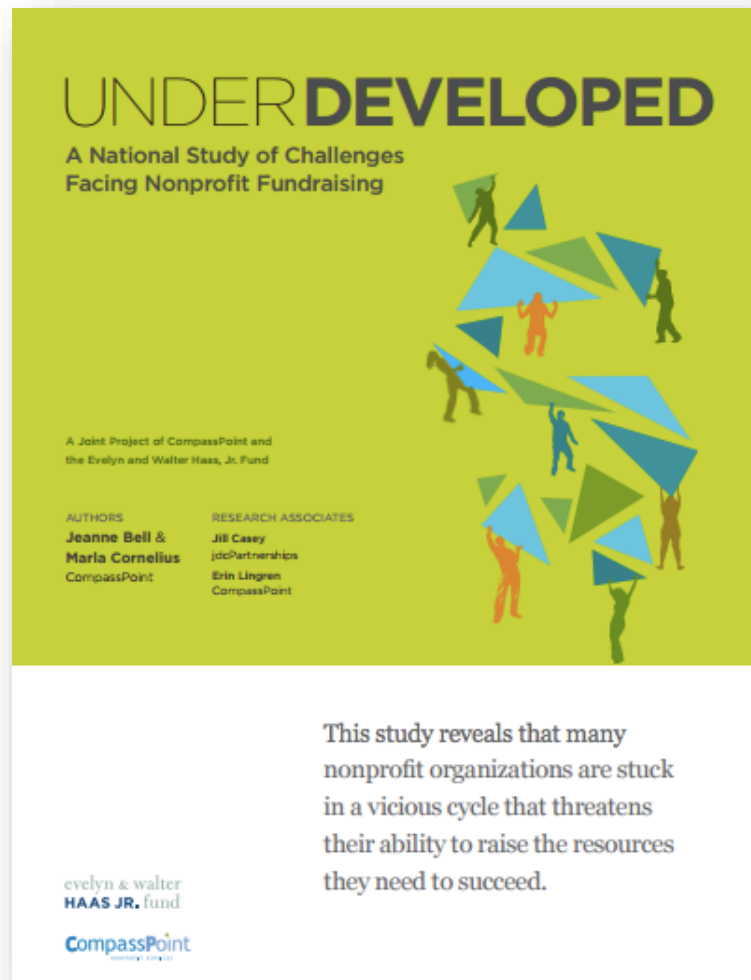
THE VALUE OF TENURE AND COLLEGIAL RELATIONSHIPS



Coronado Hospital Foundation
Grossmont Hospital Foundation
Sharp HealthCare Foundation

TURNOVER

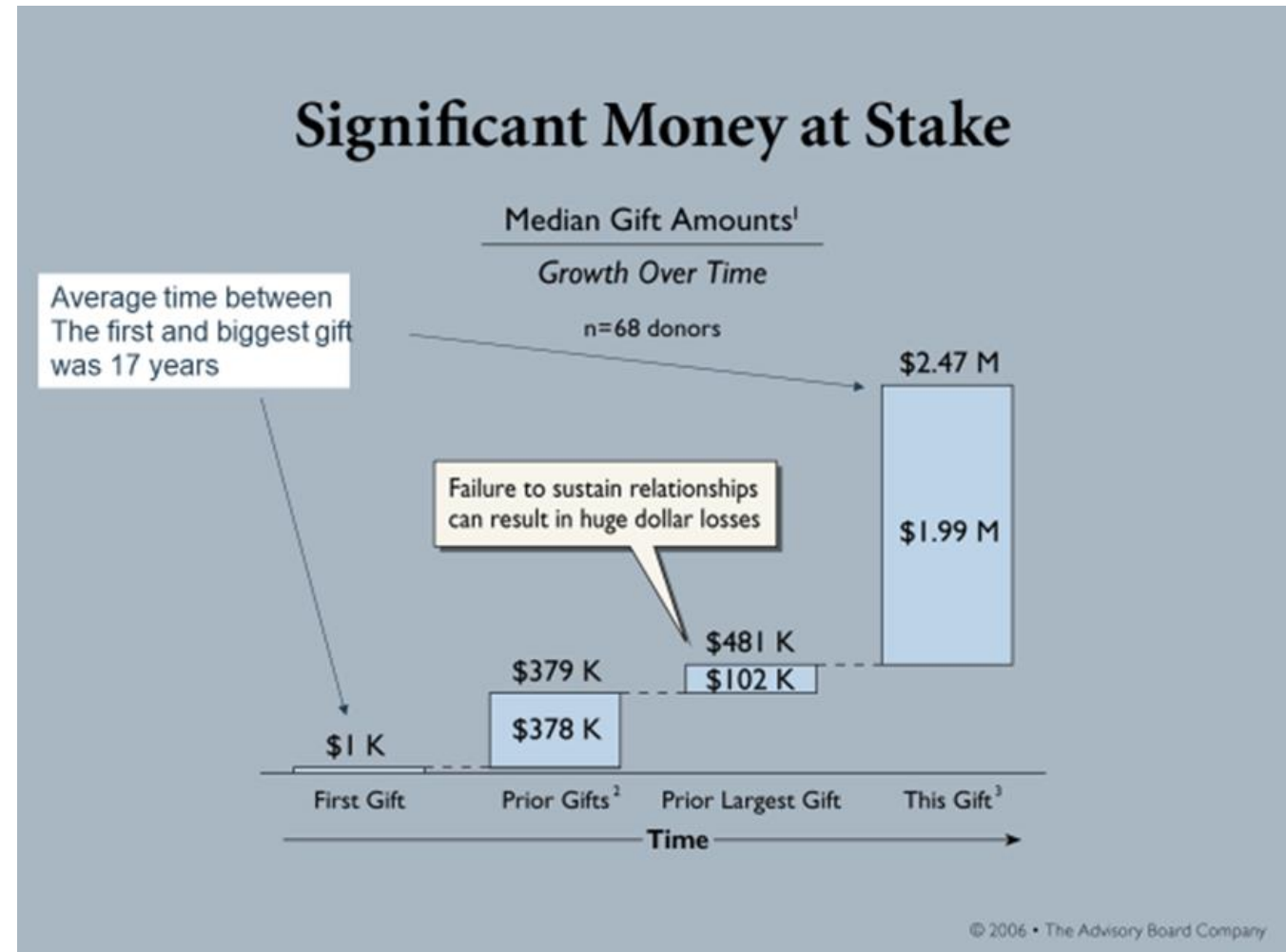
Continues to Mark Professional Philanthropy



TENURE CREATES SIGNIFICANT VALUE ADDED

Disruption in the Donor Development Process is Costly

- An Advisory Board study showed that major donors to health care of \$2 million or more, their first gift was \$1,000.
- And the time between the first and largest, on average was 17 years.
- How are you acquiring, stewarding and growing your \$1,000 donors?
- How is the institutional relationship with the donor managed over time?



BEST PRACTICES FROM PRACTITIONERS....

Shared Experiences

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Mentor Profile

Directory / Member Directory / Profile / Mentor Profile

Mr. Bill Littlejohn

Senior Vice President & Chief Executive Officer - Sharp HealthCare Foundation, Sharp HealthCare 110 new messages

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BOARD CHAIR

MEMBER AMBASSADOR

MENTOR

Gold Most Valuable Member

Status:	Not Participating
Current Number of Mentees:	1
Maximum Number of Mentees:	3
Start of Mentor Availability:	03-01-2022
End of Mentor Availability:	02-28-2023

[Edit Mentor Status](#)

Bio

Bill Littlejohn is one of the nation's leading health care philanthropy professionals. With more than three decades of experience, Bill has led and directed philanthropic programs that have generated more than half a billion dollars. Bill

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A CAREER OF SHARING

Philanthropy and Fundraising are the Same in Every Language

INSPIRONS-NOUS DES MEILLEURES PRATIQUES
OUTRE-ATLANTIQUE
BILL LITTLEJOHN, SHARP HEALTHCARE FOUNDATION

Bill Littlejohn est le Directeur général de la Sharp Healthcare Foundation et le premier vice-président de Sharp Healthcare (regroupement d'organisations de santé à but non-lucratif à San Diego, aux Etats-Unis). Il conseille également la Grossmont Hospital Foundation, la Coronado Hospital Foundation et les entités de Sharp. Bill Littlejohn interviendra pendant le programme dédié aux secteurs santé et hospitalier, et partagera son expérience des programmes de fundraising dans les organisations de santé aux Etats-Unis.



A l'occasion de la 13^{ème} Conférence de fundraising
pour l'Enseignement Supérieur et la Recherche
l'Association Française des Fundraisers organise



Programme dédié aux secteurs
santé et hospitalier



7 et 8 mars 2018 . Paris



40 YEARS – FROM A DRAGSTRIP TO THE OCEAN VIEW TOWER



Proudly holding a \$3,400 donation from Coors to the American Cancer Society are, from left, **Ron Richards**, Coors sports media relations manager; **Tom “Mongoose” McEwen**, Coors-sponsored funny car driver; **Bill Littlejohn**, American Cancer Society development director; and **John Ross**, Coors sports manager.

McEwen helps fight leukemia

Most people know Tom “Mongoose” McEwen for his skill behind the wheel of a Corvette Funny Car. Few know about his drive to combat leukemia, the disease that claimed the life of his 15-year-old son, Jamie, in 1978.

At the beginning of the 1985 racing season, Tom convinced Coors to help him raise money for the American Cancer Society. Coors agreed to donate \$100 every time Tom reached the first round of the 16-car elimination bracket, \$150 when he made the second

round, \$200 for the semi-finals and \$300 when he raced in the finals.

On Oct. 19, at the National Leukemia Research Fund, McEwen presented the check to Bill Littlejohn, American Cancer Society development director.

Said Bill Littlejohn, American Cancer Society director of development for Eastern Los Angeles County, “Whenever you get someone who reaches as many people

as Tom does over the course of a season, it helps to get more and more people involved in fighting cancer.”

Added Tom, “I am really happy Coors is involved in a program like this. I know what leukemia victims and their families are going through. It’s nice to be able to give something to people who really need help.”

In addition to raising money for cancer research, Tom spends time at several hospitals across the country, visiting with cancer patients.

1985

2020





Eddie Thompson, Ed.D., FCEP

Thompson & Associates

Founder & CEO

eddie@ceplan.com



Bill Littlejohn

Senior VP and CEO //
The Foundations of Sharp
HealthCare

William.Littlejohn@sharp.com



David Flood

Senior VP & Chief
Development Officer
President //
Intermountain Foundation

David.Flood@imail.org



Randy Varju

Foundation President and
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AdvocateAurora Health

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Susan Doliner

Vice President of
Philanthropy // Maine
Medical Center

Susan.Doliner@mainehealth.org





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FEBRUARY 28, 2023

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