



## Guidelines for Developing Leadership Annual Fund Impact Statements for Children's Healthcare©

We know people give to our institutions because they want to make a difference and they believe that we are the right place to effect that societal and/or individual change. Also, alignment of values, play a critical role in decision-making. Our donors take a leap of faith and trust their philanthropy will accomplish something important and in keeping with their beliefs

Giving small gifts to operating budgets doesn't require a great leap of faith. As we seek larger, repeatable, unrestricted and budget relieving gifts of \$1,000 to \$25,000 (and for some larger institutions \$50,000 and \$100,000), however, that leap of faith appeals to far fewer people. They often want to give to specific projects and purposes because they want concrete and specific outcomes and they worry about our ability to effect change.

So how do we make leadership annual fund gifts (\$1,000+) as appealing as restricted gifts? **We add impact statements to our giving clubs.** They serve as the case for investment for your leadership annual fund program specifically, though you can use the ideas to bolster your case for the entire annual fund.

### **Impact statements answer four donor questions:**

1. What will the gift support?
2. What difference will this make in the lives of my children, family, our community members and the physicians, counselors, nurses and staff who provide the services?
3. What are the outcomes a donor can expect from this gift or how will this make someone else's life better (our community better, our state, our society better)?
4. Why should I, the donor, increase my gift?

The last question is particularly important. As you move up the giving ladder, the impact envisioned should get larger, more significant and more appealing thus giving the donor reasons not only to give, but also to give more.

Be sure to tie the gift level to specific services and programs you provide but don't feel these must be a dollar-by-dollar accounting from your balance sheet. You want to give your prospective donors a sense of the **kinds of things** their gifts will **help** accomplish or support, not what item their dollars will "buy". (This is philanthropy, not shopping!) You **do** want to make the examples included in your impact statements tangible and link them to specific impacts and outcomes.

### **Examples of Impact Statements for prenatal and child healthcare -- \$10,000**

- Supports a Nurse (counselor) for one year, enabling a highly-talented professional work with mom's to-be increasing chances for a positive outcomes for the mother, child and family
- Provides families with infant screening helping us detect early problems and solve them

- Helps new mothers to breast feed their babies resulting increased immunization against disease
- Supports our healthy community program or health and wellness program that decreases life's possibilities for children of our community while increasing life span, decreasing healthcare costs, and ensuring a better quality of life
- Enables our leadership to place critical unrestricted funds into those areas where opportunities are greatest and innovations most needed

### **Remember**

What you can accomplish with a gift of \$5,000 must be appealing, but not as compelling as \$10,000 outcomes.

### **Names Matter**

Joining a giving club like the President's Council that includes all gifts of \$1,000 to \$25,000 is a great way to recognize all leadership annual giving donors. But don't stop there. If I receive the same impact benefits by giving \$1,000 as I do giving \$5,000, why should I give more?

### **Mission-based Names**

To the degree that you are able, name the various giving levels with things that matter. Don't settle for the Founders Club, or the Diamond Group. Who cares? For example, Easter Seals, an organization that helps people with disabilities of all ages achieve product lives named their levels Ability, Dignity, Opportunity, Empowerment and at \$25,000 – Independence, the ultimate goal. Tie your giving levels to mission saving your most prestigious name like Health Babies for your highest giving level – perhaps \$25,000.

***Maxim:** Make sure major gift naming opportunities do not compete with leadership annual giving levels. If someone can endow something for \$10,000 and receive recognition in perpetuity, why should someone give \$10,000 every year?*

### **Getting Started**

Meet with your CFO and go over the budget. Where do unrestricted dollars go? What do unrestricted funds accomplish? Which of those things would be appealing to donors? Meet with physician and nurse leaders. Brainstorm with them what unrestricted and/or budget relieving programs, initiatives and/or opportunities would have appeal?

*Remember, you are not restricting gifts. You are simply letting donors know these are the types of things accomplished with gifts of this size.*

As you develop and refine your impact statements, use this task as another reason to get in the door with your prospective donors: asking for help reviewing your materials is a great way to generate new ideas about how to use these, but also a terrific way to find out what resonates most profoundly with your individual donors!

### **How to use Impact Statements:**

Do use the information you gather to develop your leadership annual fund impact statements throughout your fundraising efforts in support of your organization. They can be:

- Incorporated into your website and printed materials, or as a "stand-alone" brochure

- Used to bolster all types of special events including point of entry, engagement, solicitation/fund-raising and recognition/stewardship events
  - At a fundraising event, for example, you can offer giving circle level tables at a gala or foursomes at a golf outing, letting participants know what can be accomplished with their collective gifts.
- Included in all speeches given by your staff and medical leaders and in face-to-face or phone calls by staff or volunteers
- The basis for all your in-person engagement visits with prospective donors
- And, of course for Stewardship

### **Using Impact Statements for Stewardship**

The impact statements “market” your leadership annual giving programs. They offer a promise of change. Stewardship demonstrates the fulfillment of that promise. This is what we said we would accomplish and we did. Linking your stewardship and accountability reports, communications, and events to the impact statements reinforces the importance of unrestricted and/or budget relieving giving.

***If you would like to learn more about creating mission-based leadership annual giving circles; making the case for support; making effective in-person visits; incorporating leadership annual fund solicitations into major gift and campaign solicitations; creating or enhancing your stewardship program so that it includes annual giving, consider taking one of the many excellent workshops online, on the phone or in person. Or contact us for consultation and advice at [mail@theosbornegroup.com](mailto:mail@theosbornegroup.com) or 914 428 7777.***

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