

FundraisingMatters

We Share Your Passion!

“Eleven Commandments” of Fundraising

*Borrowed Stolen and Loosely Interpreted by Michael Sarid
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Western Region Director of the US Holocaust Museum*

1. First, do no harm. With enough preparation, “harm” can almost always be avoided.
2. Solicitor, solicit thyself. Making your own gift makes you a far more effective advocate, ambassador and asker. You’ll be able to say, with all sincerity, “I’m passionate about this cause and here’s why I chose to support it.”
3. If you don’t ask, you won’t get. Gifts sometimes “drop from the sky,” but that is not an effective fundraising strategy! Corollaries: If you do ask, you might get; if you ask for a lot, you might get a lot, and if you ask frequently, you might get frequently.
4. Never say “no” for other people. They are perfectly capable of saying “no” for themselves. If you suspect someone may not want to give, that’s not a good enough reason to remove them from your solicitation list!
5. The best predictor of future giving is past giving. The fact that someone “already gave” is a reason to ask, not a reason to refrain from asking.
6. The best prospects are those with the three C’s: Connection, Capacity and Concern. Preferably, all three. I.e., Bill Gates may have great capacity, but are any of us connected with him, and is he concerned about our cause?
7. More personal is always better than less personal. Always. Never make a phone call when you can meet in person, never send a letter or email when you can make a phone call, and never write “Dear Friend” when you know the person’s name.
8. People care most about personal impact. Next, community impact. Last and least, organizational impact. Personal stories work. Organizational insiders, take heed!
9. Ask not what your donors can do for you; ask what you can do for your donors. Effective solicitation requires effective cultivation, recognition and appreciation. Speaking of which, there’s no such thing as too much thanks!

Is your Health Care Foundation HIPAA Compliant when sending direct mail?

This question was recently posed on the AHP bulletin board. The consensus was that healthcare organizations follow the following protocol when it comes to targeted mailings:

Limited filtering by department to avoid inappropriate fundraising is an essential business operation and therefore supported under the HIPAA Privacy Rule Minimum Necessary Standard

The underlying tenet to the HIPAA Privacy Rule is the Minimum Standard Requirement – using the minimum necessary protected health information to perform legitimate tasks. Filtering to avoid inappropriate fundraising is essential to health care operations and therefore a legitimate and allowable activity under HIPAA that does not impact patient privacy. When there are varying interpretations of compliance, it becomes a business decision for the health care provider. And one that will be made based on legal advice, looking at the possible consequences of the decision, and the health care organization’s tolerance for risk.



10. People are far more likely to fulfill specific commitments than general commitments. According to the studies, the donor who commits to a *specific amount* by a *specific date* for a *specific purpose* is **four times more likely** to follow through with the gift than the donor who says merely, “I’ll give something when I can.”
11. Like comedy, the secret to good fundraising is timing. Your “solicitable moment” may be brief. Don’t let it slip by! Also, there is such a thing as a wrong moment, but there are far more right moments than wrong ones.



YOUR 2012 CHECKUP MAKING THIS YOUR HEALTHIEST YEAR EVER

We wanted to present a slightly different “estate planning” seminar as part of St. Mary’s annual development plan. By combining financial, charitable and spiritual components, we felt that this seminar would be a creative change and be received very positively by their donors.

The St. Mary’s Medical Center Foundation presented this seminar to its medical staff, longtime donors and Legacy Society members as a way to express their appreciation and continue to share important information to their supporters. It featured three short presentations 1) Investment Trends for 2012, presented by Fifth Third investment banking executives; 2) Estate Planning Highlights, presented by a top estate planning attorney; and 3) Recommendations for maintaining a Healthy Lifestyle, presented by a longtime St. Mary’s physician. The seminar concluded with remarks from St. Mary’s Medical Center’s President, Michael Sellards.

In addition to topical information regarding national and international investments trends, the following highlights were important take-aways by the seminar guests.

This seminar was coordinated by David Sheils, President of St. Mary’s Medical Center Foundation and chaired by Robert Welty, State President of Fifth Third Bank and St. Mary’s Foundation Chair. For more information, please contact David Valinsky Associates.

Estate Planning

The four most important documents that you should have:

1. Current Will
2. Business Durable Power of Attorney
3. Durable Power of Attorney for Health Care
4. Living Will

Keys to Maintaining a Healthy Lifestyle

Our presenting physician truly was the highlight of the evening as he reflected on his almost 50 years of practicing medicine. He is a gastroenterologist.

1. Know your family’s medical history
2. Have a personal physician who knows your medical history
3. Know your numbers – blood pressure, weight, cholesterol, blood sugar
4. Take care of yourself
 - Don’t ignore unusual symptoms
 - Alcohol in moderation
 - No tobacco
 - Know yourself spiritually
 - Cultivate friendships

2012 Current Estate Tax Deduction of \$5,000,000 will expire at the end of this year and it’s anticipated that it will revert to \$1,000,000.

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“Thanks David - I really appreciate getting these e-newsletters - this one in particular has great reminders about our relationships with our donors and is a keeper! Take care and thanks again. “

— JoAnn Seaman
Development Director
Mother Cabrini Shrine
Golden, Colorado



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