

HEALTHCARE philanthropy

A Physician's-Only Giving Circle:

Why Their Gifts Aren't the Best Part

Also in this Issue

- 10** To Campaign or not to Campaign (Chief Philanthropy Officer's Version)
- 25** The Resilient Fundraiser: Fighting Burnout and Regaining Control of Your Life
- 30** Nurses Lead the Way: Maximize Fundraising and Inspire Volunteers for a Key Hospital Program

A Physician's-Only Giving Circle: Why Their Gifts Aren't the Best Part

By Jessica Benko



40+ physicians.
\$460,000 committed.
50 grants funded.

Beacon Health Foundation's Physician Philanthropy Council (PPC) offers Beacon Health System doctors a unique, hands-on approach to gift-giving and grant-making. It has proven to be a highly effective engagement tool between Foundation staff and system physicians, with many ongoing benefits. This model may work well for other organizations too, so we're thrilled to share our lessons learned, successes, and ideas for future growth.

In 2019, Beacon Health Foundation launched the system's first-ever, physician's-only giving program. Our initial optimism was fueled by early buy-in from a few critical physicians and an eagerness to try something new from a major gifts perspective. We set goals, deployed tactics, and continued internal conversations. Though we weren't totally sure what outcomes to expect, we soon felt our measured excitement transforming into joyful gratitude.

Fast forward to today: physician engagement with our Foundation—fostered by participation in the physician-only giving circle—has flourished. That's not just from a dollars-raised standpoint. Membership growth has been, and

continues to be, both organic and referral based. The impact remains measurable, tangible, and meaningful.

But what's even more exciting? Relationships between gift officers and clinicians are strengthening. And providers are becoming more aware of philanthropy's role within the system. Our Foundation is a trusted partner across multiple specialties and service lines; opening doors for grateful patient referrals, legacy gift conversations, and alignment on fundraising initiatives. Undoubtedly, this program has become a catalyst to successfully partnering with physicians.

Why Physicians Only?

Beacon has a successful employee giving program, with approximately 40% of eligible staff choosing to participate. Though some doctors give through this program, our prospects have traditionally been non-physicians. Thus, we identified an opportunity. Beacon was growing, and we needed a way to more effectively engage with the 1,100+ physicians in development capacities.

Early feedback from internal stakeholders, particularly physician leaders, was encouraging. They too saw an opportunity to give back in a meaningful way. The twist? They wanted "more say" in directing their gifts. Though all donors can designate their dollars to the areas of their choosing, the message was clear. Physicians would be more open and willing to give back financially and at a major gift level if they could have an active role in allocating dollars.

The Power of a Giving Circle (With a Twist)

Most shops do not have the capacity to give every \$10,000 donor—physician or not—the ability to play grant maker. We are no different. As a small team, our resources are limited. That's why a giving circle felt like the perfect fit.

According to an article in *Philanthropy Together*, "A giving circle brings a group of people with

shared values together to collectively discuss and decide where to make a pooled gift... Individuals multiply their impact and knowledge, have fun, and connect with their local community."¹

It's likely we are not the only team using a collective giving approach to fundraising. In fact, CCS Fundraising's *Snapshot of Today's Philanthropic Landscape 2022, A Guide to Philanthropy in the US* report stated that "Collective giving groups in the US have tripled in the last decade...With over \$2 billion flowing annually from collaboratives working on a range of societal issues, the prospects for future growth from these groups are high."²

So, what's our twist? We considered what could happen if we combined the inherent power of a successful giving circle with individuals **already connected** to our organization. We knew these individuals would be highly motivated and passionate, with both **ability and capacity** to influence change. As a result, the Physician Philanthropy Council (PPC or the Council) came to fruition.

How it Works

At its core, the PPC is an annual giving program for physicians within a giving circle structure. The commitment is \$10,000 over five years. Most Council participants are generally employed physicians, while a few are employed by closely aligned independent groups.

Because physicians' time is valuable and limited, requirements for participation are minimal.

In Q1 each year, we host a Voting Meeting for Council participants. Meetings are 75 minutes, facilitated by Foundation staff and held at the hospital. Each meeting includes the following:

- **"Elevator speech" presentations.**

Departments asking for grant support provide a three- to five-minute overview of their problem or need. Council participants then have a chance to ask follow-up questions.

- **Grant-making discussions.** Following the presentations, Council participants consider the available grant opportunities and allocate dollars.
- **Other business.** Conversations generally focus on membership referrals and/or potential future grant opportunities.

In Q3, we hosted a Stewardship and Update Dinner. This event provides:

- Fellowship opportunities outside of work for all participants and their guests
- Face time with hospital and system leadership
- Real-time updates from at least two grant recipients, who share metrics and stories about how Physician Philanthropy Council (PPC) dollars are making an impact
- A chance for Council participants to invite a colleague to learn more about the PPC

Grants and Very Local Giving

In our experience, giving is almost always done locally. The Physician Philanthropy Council (PPC) is no exception. PPC-awarded grants **exclusively support** Beacon Health System programs, services, patients, and community-focused efforts.

Most often, grants target:

- Vulnerable and at-risk patient and family populations
- Associate training opportunities
- Start-up costs for new and/or pilot programs
- Small equipment and capital needs

When a Beacon department seeks grant support, it comes with additional responsibilities. Those asking for support must complete a short application defining the problem, proposed

solution, and anticipated outcomes. In addition, they present their project to the Council. If the grant is funded, recipients must measure specific metrics throughout the year. Outcomes and stories are shared through a year-end report to Council participants.

As is probably expected, there are always more needs than dollars available. Interestingly, during our last two Voting Meetings, individual Council participants have committed additional dollars (and encouraged their colleagues to do the

What are Physicians Saying About the PPC?

“The challenges of healthcare are not going to slow down; they will only continue to increase. What’s been shown is that healthcare can’t be tackled alone, it has to be a true partnership with the community. With the challenges increasing, there is going to be a greater opportunity and a greater need for more physicians to have a say in what happens not only within the hospital, but outside the hospital; through a different avenue: philanthropy.”

—Samir Patel, MD, CCD, DABR, FACR

“If I had to describe the Physician Philanthropy Council in one word, it would be ‘catalyst’...a catalyst in that we’re not coming up with ideas ourselves. We’re taking ideas that come from employees and community members, and we’re helping to turn them into reality. We’re not sustaining them forever, but we’re giving them the boost they need to become self-sustaining.”

—Luke White, DO

same) to help bridge as many gaps as possible. Their above-and-beyond commitments have translated into an additional \$20,000 in PPC gifts.

Why Our Physicians' Gifts Aren't the Best Part: Long-Term Benefits

Our first goal on this journey was simply to grow participation. After all, higher membership correlates to greater impact. We've since realized there are other, longer-term benefits of having a physician's-only giving circle.

Physician Well-Being. Today's healthcare environment is turbulent, to say the least. Burdens on physicians are extraordinary and plentiful. Philanthropy alone cannot solve the greater systemic issues that lead to burnout and dissatisfaction. It can, however, give physicians a sense of fulfillment beyond that of their daily work. The giving circle structure helps:

- Foster fellowship and comradery amongst like-minded colleagues
- Strengthen connections between disciplines and departments
- Provide an autonomous approach to problem solving

It can also help enhance empathy for patients, families, and hospital colleagues, as Council participants gain a deeper understanding of the struggles faced by others. Collectively, these features can help counterbalance the mental and emotional toll of physicians' work, potentially reducing burnout and improving well-being.

For us, two specific metrics speak to the high level of fulfillment that physicians experience through participation. The first is the number of physician referrals. Since the PPC's inception, we've received more than 45 unique membership referrals by Council participants, 19 of which have turned into new members.³ This demonstrates participants' trust in the Foundation's oversight abilities, as well as their

belief that the Council is making a positive difference.

The second metric relates to attendance at events. On average, more than 80% of Council participants attend the annual Voting Meeting (including those who send their votes ahead of time), and more than 70% attend the annual dinner. This has been (very pleasantly) surprising to us, given how varied on-call and clinic schedules can be.

HELPFUL HINT

Online polling platforms have proven to be exceptionally helpful in obtaining physicians' input when choosing dates and times.

Greater Collaboration between Physicians and Staff

The Physician Philanthropy Council (PPC) cannot function without projects and programs to support, and staff to administer them. Conversely, these same projects and programs would likely not happen without support from the PPC.

This symbiotic relationship has led to greater collaboration between physicians and staff. New problems and needs (i.e., opportunities!) are being identified—specifically by front line staff. Together, they've developed and supported effective approaches to addressing said opportunities. As a result, the increased team effort has enhanced patient support and staff morale.

When appropriate, the Foundation and grant recipients acknowledge the PPC's collective generosity. After all, stewardship remains critically important within a collective approach to giving. Regardless of whether grant recipients are patients, families, staff, or community members, feedback is always the same. Everyone has an overwhelming sense of gratitude for the

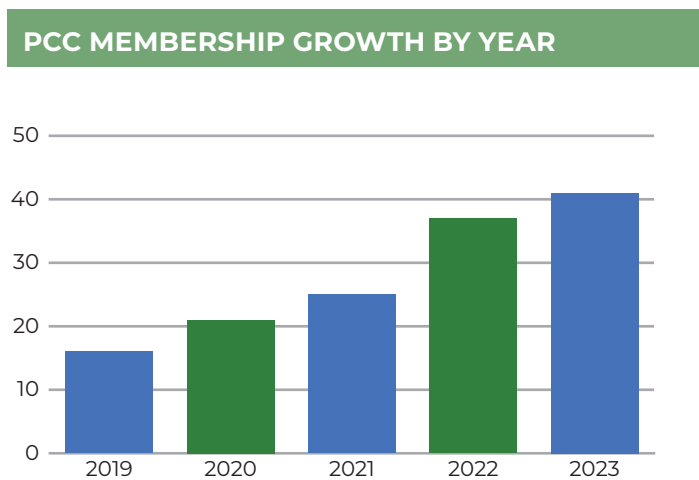
physicians who are going above-and-beyond to care for others. This gratitude and compassion for Council participants reinforces positive internal relationships, perceptions, and working environments.

Trust is Key to Advancing Relationships

This isn't a new concept. Trust is a critical component of building and maintaining strong relationships. This may be even truer now, since Indiana University reported this year that "Americans trust nonprofits more than government or business, but levels of trust in all three sectors are low."⁴

Building relationships with physicians is no different. The PPC has been an extraordinary catalyst for identifying and engaging with a new and growing group of doctors. It's the trust we've earned through building and overseeing the Council, however, that has been integral in deepening our relationships.

From partnering in our grateful patient program and helping identify needs (which sometimes is half the battle!) to making legacy gifts and participating in cultivation activities, physicians can engage with our Foundation in many ways. Because Council participants better understand the mutually beneficial nature of healthcare philanthropy, they have become more involved with our team.



MEMBERSHIP	
Total dollars committed to date	\$460,000
Total # of PPC commitments to date*	44
# of PPC members who were first time donors	23
# of physicians who, prior to joining the PPC, had made a \$10,000+ commitment	2
# of unique physician-to-physician referrals	47
# of referrals that have turned into memberships	19
# of physicians who have given "above and beyond" during voting meetings	3
Total above-and-beyond dollars given during Voting Meetings	\$20,000
# of physicians who have made legacy gifts, since their PPC membership	2
Total legacy dollars given	\$35,000
GRANTS	
# of grants funded	50
IMPACT	
# of grants supporting patients and families	18
# of grants supporting staff	7
# of grants supporting the community	6
# of grants supporting equipment/capital	2

This is the total number of physicians who have made commitments, and made at least one gift to the PPC. To date, six Council participants have terminated their commitments early because they've either left the system or had a family hardship

Lessons Learned and Future Opportunities

How Many PPCs are Best?

As a regional system, Beacon has 146 care sites—including eight acute care hospitals—across seven counties and two states. When the PPC launched, however, Beacon had only two acute care hospitals in neighboring counties. We intentionally formed two separate councils, one at each hospital (these are also our largest hospitals). The Councils operate independently from one another.

Depending on the size and location of your hospital/system, consider the following when deciding whether a single council or multiple councils will be best:

- Physician prospect pool
- Cultural differences and giving attitudes within different hospitals, outpatient clinics, and communities
- Buy-in from executive and physician leadership
- Quantity of grant opportunities

Because the Councils align with two hospitals, the majority of participants are inpatient specialists. With that said, we've seen an increase in primary care physicians committing in the last two years. In all cases, these physicians participate on the Council that aligns with the hospital where the majority of their patients receive care.

Navigating Change and Challenges

Whether it's unexpected organizational changes, internal politics, or a global pandemic, the following considerations are based on our lessons learned. To navigate most barriers:

Identify champions. For us, it all started with

Examples of PPC-Supported Grants

Lodging Program for Trauma & ICU Patient Families

Beacon's largest hospital is also our region's only level 2 trauma center. Meaning, patients and their families don't always live close by. Overseen by the trauma case manager, this program gives qualifying families up to five night's stay in a local hotel at no cost to them. Keeping families together, during some of the earliest and toughest days of their loved one's hospital stay.

Reducing Infant Mortality via the BABE Store

BABE is a unique store that offers incentives to expectant mothers and parents to encourage responsibility and improve self-esteem. As a comprehensive incentive program, it gives parents the ability to earn coupons for keeping prenatal and well-baby appointments, attending parenting classes, and more. Grant dollars purchase items that the BABE stores need including clothes, formula, diapers, wipes, car seats, etc.

In-Home Attendant Care: Pilot Program

A joint grant supported by both Councils, this first-of-its-kind program at Beacon aims to implement an innovative approach to care-coordination and in-home services for some of the system's most vulnerable and high-risk patients. The Councils' grants fund a partnership with a local home health agency, who provides qualifying patients with dependent care services immediately upon their discharge.

buy-in from four physicians; two at each hospital. Find your champions and keep them involved!

- **Be adaptable.** If something's not working well or needs to change, fix it and move on.
- **Be informed.** Have a general understanding of when contract negotiations are happening, which departments and groups are in a "good place," and when physician-facing presentations are appropriate. Finding the right time and place for recruitment is critical.
- **Focus on impact.** Emphasize the tangible impact of the grants and the minimal time requirements for physicians. Demonstrating impact gets easier after the first year!
- **Utilize physician-to-physician referrals.** This will almost always be the easiest and most efficient way to recruit new people! Ask Council participants to open doors to colleagues. Some may even be willing to ask their colleagues themselves.
- **Generating grant ideas.** Providing projects and programs for funding consideration has, at times, been challenging. Though Council participants are encouraged to submit grant ideas, most do not. Ensure relationships with internal stakeholders are strong, as they are critical to helping identify and oversee grant opportunities. This is an extremely important component of future success.

Conclusion

Excitingly, the Physician Philanthropy Council (PPC) will celebrate its 5th anniversary next year.

Leading timely change, built on timeless truths.

Times have changed; yesterday's one-size-fits-all campaign communications are fading in impact. As a healthcare fundraiser, you need a strategic communications partner to *foster* modern capabilities for your team.



FosterAvenue
formerly **SNARELYASSOCIATES**

Reboot your campaign communications.
Download your free checklist [HERE](#).

In many ways, it feels like we've finally reached a tipping point with participation—our group of physicians is large enough, and highly respected, so recruitment has become easier. We're confident that our earliest adopters will renew their commitments and continue to be strong champions of the Foundation. What a privilege it has been to work with this amazing and ever-growing group!

Perhaps now more than ever, as our industry faces some of its most challenging issues yet, we remain steadfastly committed to supporting our physicians. Like fundraisers, physicians are helpers driven by a desire to make a difference for others. For us, a physician's-only giving circle is the ideal platform to foster those sentiments. Physicians are empowered to solve problems and make an even bigger impact. Yes, the Foundation raises more money. But more importantly, we benefit from strong relationships with clinicians. As for the patients, families, associates, and community members who are positively impacted by the grants? They're the real reason behind what we do each day. ■

Endnotes

- 1 What is a Giving Circle? Philanthropy Together. <https://philanthropytogether.org/what-is-a-giving-circle/>.
- 2 CCS Fundraising. Snapshot of Today's Philanthropic Landscape 2022, A Guide to Philanthropy in the US (2022).
- 3 There are certain physicians—some who have become members, and some who have not—who have been referred by multiple Council participants over the years. These numbers reflect unique referrals only, rather than the cumulative number of referrals.
- 4 Giving USA Foundation. Giving USA: The Annual Report on Philanthropy For the Year of 2022 (2022).

Jessica Benko serves as a Senior Major Gift Officer for Beacon Health System, northern Indiana and southwest lower Michigan's largest, locally owned healthcare provider. She helped implement the Physician Philanthropy Council and manages all aspects of recruitment and operations. Jessica also helps lead grateful patient engagement strategies for the Foundation, while supporting select departments and service lines in their unique fundraising efforts.

With nearly 15 years of healthcare experience, in both community hospital and academic medical center settings, Jessica has successfully served in annual giving, employee giving, and marketing and communication capacities. She is passionate about helping patients and families act on their gratitude, while supporting the life-changing work of clinical colleagues. Inspired by her family, faith, and belief that everyone deserves access to expert care close to home, Jessica works tirelessly to connect donor interests with patient and provider needs.

Jessica earned her bachelor's degree from Albion College and is currently applying to take the CFRE exam. She's an avid reader and writer, and loves traveling, golfing, and volunteering for local nonprofits.