

## AHP Pacific Regional News May 2008



### Regional Director's Message

[Mary Anne Chern, FAHP, ACFRE](#)  
*Regional Director*

### Annual Fund

Thank you to everyone who has responded so generously to date for our AHP Annual Fund appeal. Our donations will be used to help AHP move forward with the Future Study research, and also supports the Resource Information Center (RIC), the AHP Scholarship Program and the work of developing AHP's online presence – eCommunities. This is one component of AHP's goal to assist professionals through a Web-enabled organization that offers a library of online tools. Mary Jane Crist, CFRE chairs the AHP Pacific Annual Fund efforts for 2008 and reports we have raised \$15,600 so far from 143 donors. Please respond generously when you are called!

### Regional Conference

Susan Blake, our AHP Pacific regional conference chair, is doing a great job of preparing an educational and fun conference for us in Portland. We are expecting another great turnout this year, so get your airfare and hotel booked now - our hotel block sold out early last year. I also want to encourage everyone to sign up for the voluntary "Taste of Oregon" on Monday night. It's going to be a blast.

### Membership update

Gina Griesman reported in March that the AHP Pacific region had 827 members, which puts us well on our way to exceeding our year-end goal of 861. If you have friends and colleagues who are not AHP members, please encourage them to join before the Portland conference so they can take advantage of special conference rates for members.

### State Roundtables

All of our state representatives are encouraged to host at least one AHP roundtable every year to encourage networking and education. I'd like to especially thank our Oregon, Washington, and Southern California state representatives for their hard work in this area.

*Oregon Members Host Seminar.* Don Russo, CFRE and Oregon State AHP representative helped organize a seminar in February which was a great success. Congratulations to our active AHP leadership in Oregon that continues to set the pace for other states.

*Washington Members Network and Meet.* Congratulations to Washington State AHP representative Randy Petty who hosted an AHP meeting in March. It was well attended and participants included cabinet members Marite Butners, JD, LLM-TAX and Susan Blake.

*Southern California SCAHD/AHP meetings.* Our Southern California state representative, Dave Burghart, CFRE is also active with SCAHD, the Southern California Association for Healthcare Development. The SCAHD meetings also serve as the AHP Pacific Southern California roundtables, which are held five times per year, and AHP updates are a regular feature of the luncheon.

## Volunteer to assist the AHP Pacific Region Cabinet

Pacific Regional Director Elect, Bill Littlejohn, has announced that the 2009 AHP Pacific Regional Conference will be held in the San Diego area. If you would like to assist on the conference committee, or if you would like to become involved with the AHP Pacific Cabinet, please let Bill know of your interest. He will be making Cabinet appointments this fall.

## Special thank you to Mark McCampbell, CFRE

I want to say a special "thank you" this month to Mark McCampbell, CFRE who has toiled away these past 18 months making sure that the AHP Pacific region keeps us networked and informed. Mark's efforts have resulted in AHP Pacific not only producing the most newsletters of any other region, but also some of the best-read newsletters. I wanted to be sure to thank Mark publically for all his hard work in keeping us up to date.

I hope to see you all in Portland on June 22!

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## En route to the Summit

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*By Susan Blake, AHP Pacific Regional Conference Chair*



### Does your to-do list have all these items checked off?

- Register for AHP Pacific Regional Conference June 22-24.
- Reserve room at the Portland Marriott Downtown Waterfront Hotel.
- Arrange travel to Portland.

If so, read no further – we look forward to seeing you in Portland next month! If not, here's all you need to do:

[Register](#) for the conference. **Save \$75 by signing up before May 23.**

Call 800-546-9513 or 503-226-7600 to reserve your room at the [Portland Marriott Downtown Waterfront Hotel](#). Be sure to identify yourself as an AHP conference attendee to get the special rate, which isn't available after May 30 and may sell out before then.

Make your travel arrangements. Visit the [Portland International Airport Web site](#) for information on airlines that serve Portland and transportation to and from downtown.

Register today – a “peak” experience awaits you in Portland!

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## **Government Relations updates**

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*By Marite M. Butners, J.D. LLM-TAX, AHP Pacific Regional Government Affairs Chair*

### **IRA “Rollover” Update**

The much awaited “extenders” package has been introduced in the Senate. Senate bill S 2886, jointly introduced by Ranking Member Charles Grassley (R-IA) and Senate Finance Committee Chairman Max Baucus (D-MT), would extend certain charitable giving incentives including the IRA “rollover” as well as provide tax relief for middle class tax payers from the Alternative Minimum Tax. You will recall that last year's House passed a version of the bill, but could not marshal adequate votes in the Senate. The House Ways & Means Committee approved HR 6049, the Energy & Tax Extenders Act of 2008, on May 15, 2008. We will keep you posted during the year as support, and opposition, for this bill comes forth.

### **Federal Trade Commission Reauthorization Act of 2008**

Senator Byron Dorgan (D-ND) has introduced S 2831, the Federal Trade Commission Reauthorization Act of 2008. The affect of the bill would be to grant regulatory and enforcement authority of the business practices of 501(c)(3) organizations to the Federal Trade Commission by changing the definition of “Corporation” in the current act to cover 501(c)(3) organizations. The FTC currently enforces a number of federal laws that are designed to protect the public including the federal “Do Not Call” registry.

### **ACGA Lowers Immediate & Deferred Gift Annuity Rates**

The American Council on Gift Annuities has recommended new rates, lowering the currently recommended rates for both current and deferred gift annuities. The new recommended rates take affect as of July 1, 2008. Updates for the [new recommended rates](#) are available on the American Council on Gift Annuities Web site.

### **Major Redesign of IRS Form 5227, Split-Interest Trust Information Return**

The IRS had issued a substantially revised Form 5227 for reporting by charitable remainder and lead trusts and pooled income funds. More information may be found on the [IRS Web site](#).

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## There is still time to become a CFRE this year!

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*By Dena Cochran, AHP Pacific Regional Education/Certification Chair*

And why should you become a Certified Fund Raising Executive (CFRE)? Here are the 10 top reasons cited by CFRE:

- It will increase your credibility as a fundraiser.
- It will improve your career opportunities.
- It will prepare you for greater responsibility.
- You will develop new skills and knowledge.
- You will improve your earning potential.
- You will demonstrate your commitment to the profession.
- It will enhance your professional image. (We can all use a little of that!)
- It will reflect your achievement.
- It will enrich your self esteem. (Not a bad thing.)
- And it will increase peer recognition of your skills and abilities.

If you aren't already convinced, take a look at the [CFRE Web site](#) or talk to a fellow AHP member who is a CFRE.

The CFRE exam is offered electronically four times a year and you have over 300 test sites from which to choose. The remaining 2008 dates are *June 6, August 22, and October 24.*

You can improve your chances of success on the CFRE exam by signing up for [The Advanced Course in Health Care Fundraising](#) to be offered June 22 at the AHP Pacific Conference in Portland, Oregon. This all-day course is designed for fundraisers with five or more years of experience who want to improve their knowledge and skills. (Sound familiar?)

The Advanced Course is also designed to be a tool to help you prepare for the CFRE exam. You can read more about the course in the Summit to Success conference brochure and on the [AHP Pacific Regional Conference Web site](#). You'll receive a workbook which will be helpful when you are studying for the exam. **Sign up for the Advanced Course by May 23rd and save \$75.**

Next month I'll bring you more tips on preparing for the exam.

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## State updates

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### California

*By David K. Burghart, CFRE, AHP Pacific, California State Representative*

We all grow professionally when we gather together and share our experiences and challenges. From such meetings we can take an idea or two back to our own work place and incorporate that idea into a new program, or take some information to tweak what we already have in operation. If we gain just one thing, then our time has been well spent.

With this in mind, I am grateful that in Southern California we have that opportunity on a regular basis, through SCAHD, the Southern California Association for Healthcare Development, to build our professional skills and enlarge our circle of friends. However, not all of us in this large state have the opportunity of such association. The good news is, that you can experience all of the above and more at the AHP Pacific Regional Conference in Portland. I urge you to attend if at all possible.

An additional benefit of attending the conference will be the inspiration you receive that will give you a boost and lift you up professionally. Every AHP conference I attend, I leave, walking just a little higher and a little more confident and I have new friends that I can call on when I have specific needs.

Let's get together in Portland and we all will benefit from the experience.

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## **Washington State**

*By Randy Petty, AHP Pacific Washington State Representative*

The Washington State AHP rountable was held March 31, 2008. Our speaker was Leo Greenawalt, president of the Washington State Hospital Association and the topic was: "Our Message To Those Who Give Money: Is It Consistent With The Economic and Political Environment?"

Greenwalt provided a thought-provoking overview regarding the historical and current financial impact of increasing shortfalls in reimbursement from Medicare and Medicaid, and levels of charity care on our respective institutions; and a forecast of how these growing losses – without major health care reform – will financially affect our institutions in the future.

He explained that these losses and shortfalls are placing unprecedented financial strain on many of our hospitals' bottom lines and their ability to maintain patient care excellence through capital investment for construction, technology advancements and programmatic needs. It also directly affects many of our donor constituents that are business owners or company executives through increased health care costs incurred in providing health care benefits to employees. Our institutions must cost-shift these shortfalls and losses to other payers through increased rates, which is a significant contributor to the rising cost of health care in this country.

He explained that under the current system for government third party payers, the outlook is not good. With 70 million baby boomers approaching retirement, Medicare reimbursement shortfalls will rise dramatically and the Medicare program is actually projected to reach bankruptcy in 11 years. At the same time the 47 million Americans currently without any health care coverage in our country continues to grow dramatically each year. Greenwalt explained how these issues are inherently tied to our case for philanthropic support and reinforce the need for building strong development programs to provide critically needed capital to maintain patient care excellence.

He added that this election year health care reform will be among the top issues to be debated. Whatever the resolution, it will affect the financial future of our health care institutions and their development programs.

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## Life Balance: Annual Exam, Part III

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By Mark McCampbell, CFRE, AHP Pacific Regional RIC/Communications Chair

*Note: This is the third installment in a series that looks at several components the health care philanthropy fundraising professional needs to review in 2008 to assure optimal success and achievement of goals.*

May: Closing in on the first half of the year, many health care fundraising shops have seen some of the major elements of their plans unfold. The galas, golf tournaments, annual fund appeals and telefund calls have been launched and completed or are coming up soon. Events and mass appeals aside, there's one key that still needs to be turned to unlock a healthy fundraising year. For most of us in health care philanthropy the key is the investment we make in individuals.

In the first two installments in *Life Balance: Annual Exam* published in the January and March 2008 AHP Pacific Region newsletters, we looked at the first check point in the annual exam: having the right *experience* level in your fundraising organization to enable you to hit your targets; and the second check point, *professional growth*. If you assess your experience level and that of your staff and find you don't have what you need, there are steps you can take to get more experience on your team.

The third check point for the annual exam focuses on the individuals involved in gift transactions – both the donor and the development professional. Anyone who has gone through the steps of identifying a donor prospect, cultivating a relationship with the prospect, educating and enlightening the prospect about the benefits of a gift and asking for the gift, knows there is one key element to ultimately receiving the gift. That key is the *spirit of philanthropy*. It is this spirit – the heart that guides the head in making the gift decision – that results from investing in individuals.

First, the spirit of philanthropy must exist in the development professional. Philanthropy is often defined as goodwill to fellowmen, especially active effort to promote human welfare. The very nature of health care, with its physicians committed to “first, do no harm” is focused on promoting human welfare. Health care philanthropy must be focused on people. While it is possible to get sidetracked by buildings and equipment and technology, the real reason we exist, the purpose of health care philanthropy, is or should be focused on the patient, the family, the caregiver, the provider, the support staff and the people that deliver health care.

The spirit of philanthropy must be innate, something you're born with, a part of who you are. Just as the adage claims, “In basketball, you can't coach tall,” for people involved in professional fund development, you can't coach a love for people. Good people skill and the love of others are in the heart of the person who is successful in fundraising. There's a passion, not so much for the cause or institution, process or design, innovation or method, but for the people in whom what we can deliver will make a lasting change.

As a development professional, part of your annual exam should include an assessment of your heart for people. Where's your passion? What's driving you to reach the goal? What gets you up in the morning? If your first thought is the people in the equation, whatever side of the gift transaction they sit on, then you're probably looking at a healthy heart. The spirit of philanthropy is alive and well in you. A colleague chokes up a little every time he starts to tell about another gift from one of his many major donors. His heart for the donor is transparent, inspiring and a testimony to his spirit of philanthropy.

Second, the spirit of philanthropy must exist in the donor or prospect. Most fundraisers have personal anecdotes about the prospect that really is playing “Let's Make a Deal.” We've been offered boats that can't sell, land deals that would produce lucrative real estate developments for the prospect and million dollar pledges where all the donor wants is “a tax receipt for the current year for the whole amount, and then loan me back the money and I'll make payments over ten years.” A gift always comes from a giver.

There are those donors who have the spirit of philanthropy and truly have a heart for people – and are savvy about the terms and conditions related to their gifts. These people are a delight to work with. We talk in terms of making the most happen with the gift, helping the most people. Gift planning involves achieving the donor's intent while producing life income that will help care for a spouse or family member. These concepts are part of sophisticated philanthropy and do not take away from the heart of the donor.

The spirit of philanthropy is important in the annual exam because it informs the development of our case for support. We've all seen hospital buildings go up and standard of care go down. We're all too familiar with the latest robotic surgery technology that sits idle. The case for support that's influenced by the spirit of philanthropy remains focused on the goodwill of the people we serve, the patients, families, and staff of the communities in which we live and work. And that makes our professional development role in health care philanthropy a healthy place to be.

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*If you have something you would like to read about, write about, talk about, or think about, please let me know at [mark.mccampbell@vmmc.org](mailto:mark.mccampbell@vmmc.org) and we will be happy to accept your suggestions, contributions and articles.*

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