

# 2020 Report on Giving Survey: What's New?

Outline of survey changes from 2019/FY  
2018 to 2020/FY 2019

# Why are there changes?

- Simplify data input
- More accurate, comparable data points for benchmarking
- Adapting to 2020 Standards Manual

# Survey Platform and Signing Up to Participate

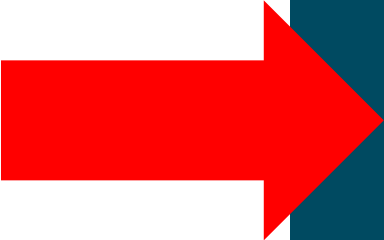
# New Survey Input Platform

## Old platform

The screenshot shows the old platform's user interface. At the top is a dark teal header with the AHP logo and the text 'Association for Healthcare Philanthropy'. A 'Log Out' link is on the right. Below the header is a purple navigation bar with links for Home, General, Administration, Surveys, Benchmarking, and Downloads. The main content area is white and contains several sections: a personalized greeting 'Hi Jasmine!' with user details; a table titled 'Important Upcoming Dates' showing 'Your Active Surveys' with columns for 'Status' and 'Deadline', and a row indicating 'No active surveys at this time'; a 'Messages' section with two notification items; and a 'Your Account Settings' section with three checked checkboxes and a 'Save Settings' button.

## New platform

The screenshot shows the new platform's survey input form. It features a dark teal background with a white content area. The form starts with a question: '\*Whom should we contact if we have a question about your survey responses?'. Below this is a note: '\*Note: If needed, you can add a additional contact later.'. The form includes five input fields: 'First name', 'Last name', 'Title', 'Email address', and 'Phone number', each with a light gray rectangular input box.



# How to sign up to participate

1. Visit [www.ahp.org/2020rog](http://www.ahp.org/2020rog)
2. Click the green “Sign Up” button
3. Let us know who your survey contacts are
4. Within 2-3 business days, AHP will send you two unique links for your organization - one for **compensation data** and one for **non-compensation data**

# Mini survey

- Basic information
- Entity type
- Net patient service revenue/Gross operating revenue
- Fundraising expense budget
- Total number of gifts
- Total number of donors
- Revenue
  - Total recorded
  - Total production
- Expenses
  - Direct and indirect compensation expenses with FTE counts
  - Non-compensation expenses

# Full survey

- Section A. Basic Information
- Section B. Expenses
- Section C. Gifts Received and Expected
- Section D. Endowments and Campaigns
- Section E. Constituency Giving
- Section F. Gift and Donor Activity
- Section G. Use of Funds

# Section A. Basic Information



# Healthcare Entity Types



\*Please identify the entity type for your healthcare entity.

Academic medical center

Behavioral health facility

Children's hospital

Community hospital

Home care/hospice facility

Other (please describe below)

**REMOVED**

Tertiary hospital

Long-term/rehabilitation

Outpatient clinic/ambulatory  
care

# Patient Service Revenue

\*Please report your Inpatient Service Revenue, Outpatient Service Revenue, and Net Patient Service Revenue below.

**Note:** Please make sure your Inpatient and Outpatient Service Revenue total to the Net Patient Service Revenue.

## ADDED

- Inpatient Service Revenue
- Outpatient Service Revenue

Inpatient Service Revenue

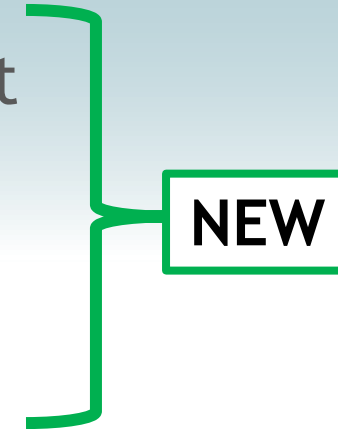
Outpatient Service Revenue

Net Patient Service Revenue

# Operations structure types

- **Single Entity**

- Non-System Affiliated Philanthropy Department
- Non-System-Affiliated Foundation
- System-Affiliated Philanthropy Department
- System-Affiliated Foundation



- **Healthcare System**

- Centralized
- Decentralized
- Hybrid



# Other Changes

- **New Questions**
  - Mergers question
  
- **Removed Questions**
  - Net Operating Revenue
  - Net Patient Service Revenue calculation method
  - Staffed beds

# Section B. Gifts Received and Expected

# Change in revenue model

## Old Model

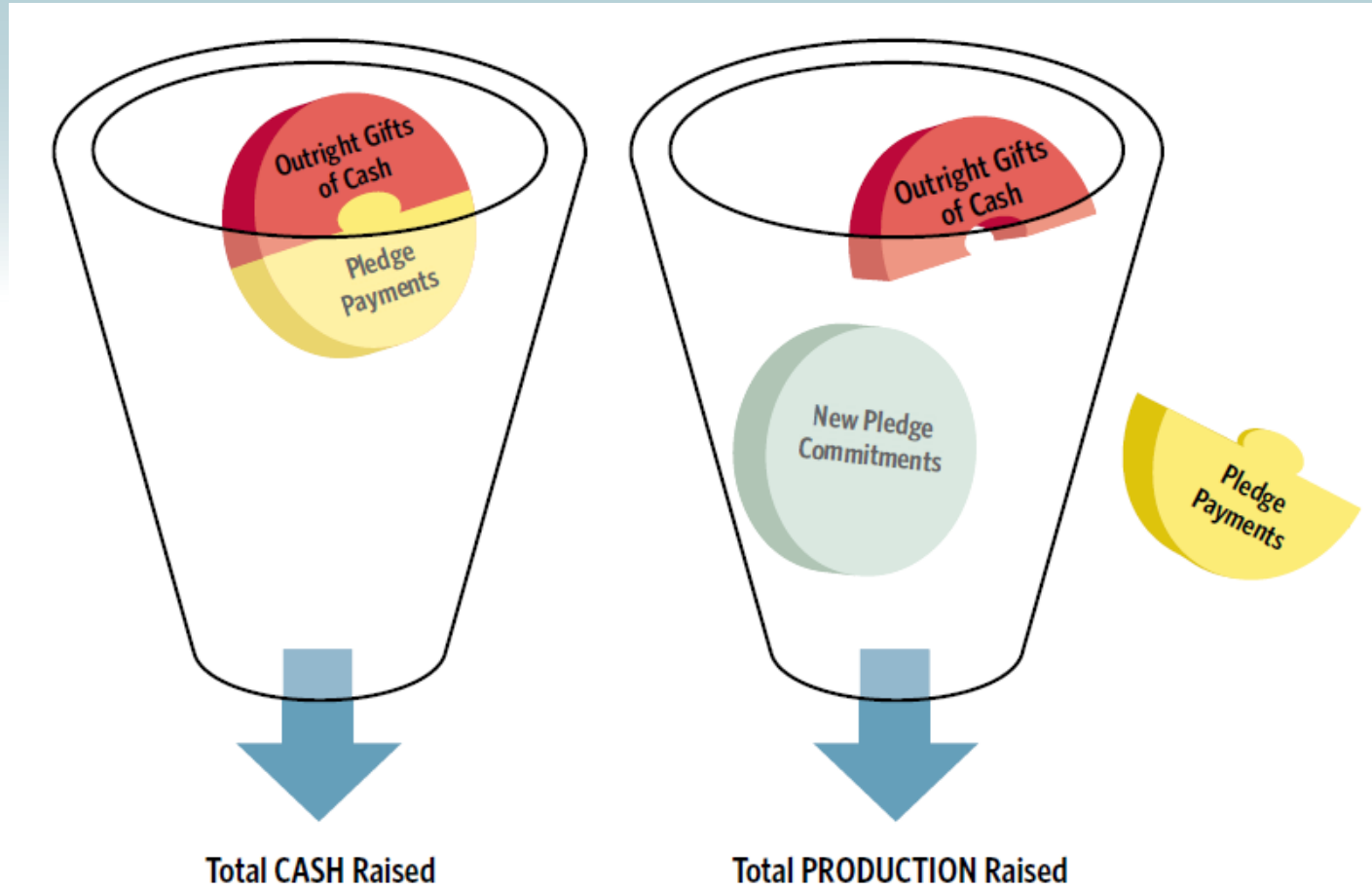
Cash and Production  
Revenue model

## New Model

Recorded and Production  
Revenue model

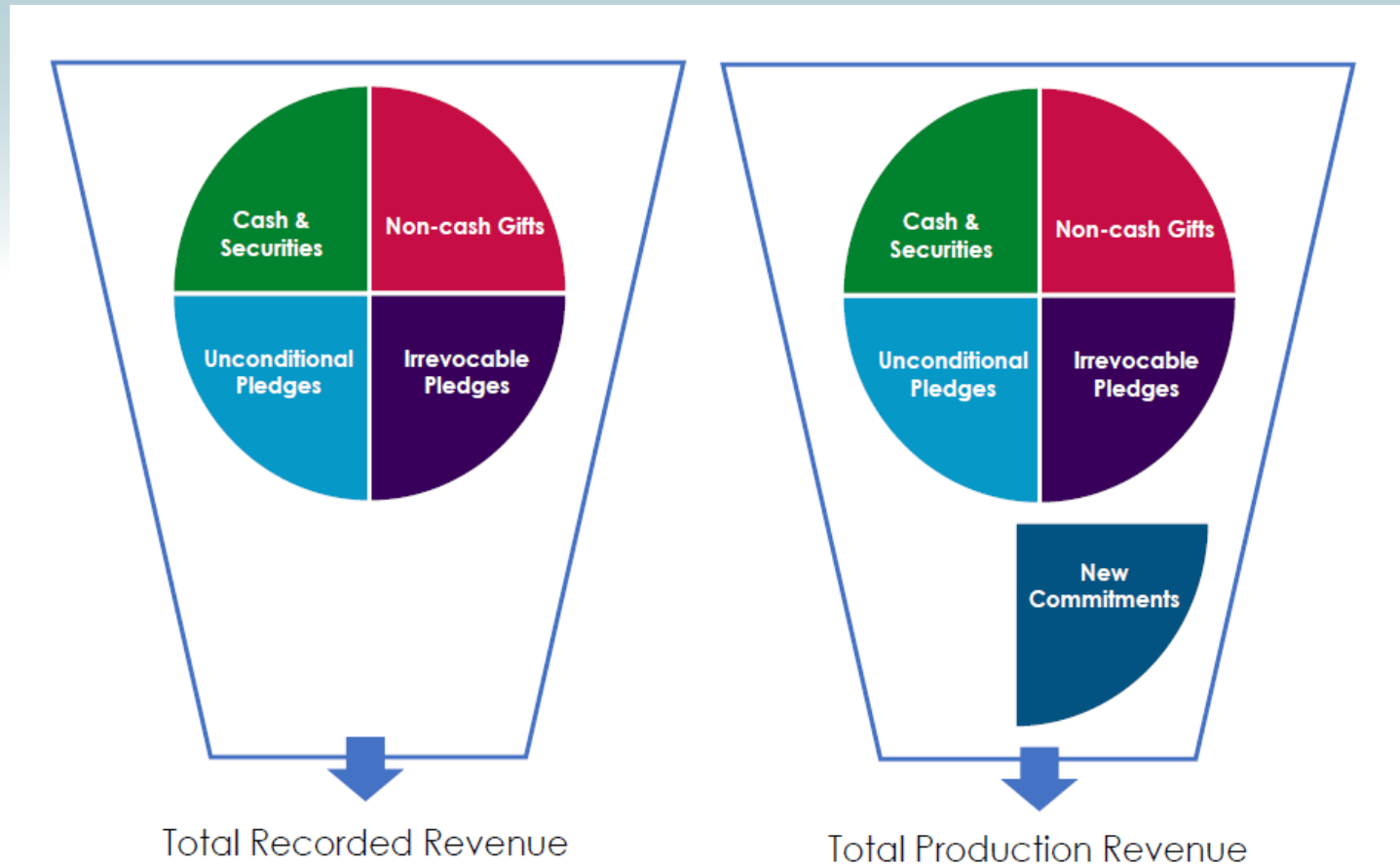
# Old Model

## Cash and Production Revenue



# New Model

## Recorded and Production Revenue





# Example

## Annual Gifts Revenue in Old Survey

		Number of Gifts	Value of Total Gifts
Annual Gifts	Annual gifts (outright)		
	Annual gift pledges and letters of intent secured		
	Annual gift pledge payments		
...			

# Example

## Annual Gifts Revenue in New Survey

		NEW		
		Number of Donors	Number of Gifts	Value of Total Gifts (Fair Market Value)
NEW	Annual Gifts	Annual gifts recorded		
		Annual gifts secured, but not recorded		
...				

# Other Changes

- **Added**
  - Gifts over \$1 million expanded
  - Pledge write-offs
- **Removed**
  - Pledge collection rate

# Section C. Endowments and Campaigns

# Campaign goals for entire system added (for Healthcare System participants only)

	Campaign goal	Amount raised during the reporting year	Campaign start year (YYYY)	Campaign end year (YYYY)
Campaign 1	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Campaign 2	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Campaign 3	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Campaign 4	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Campaign 5	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Campaign 6	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Total	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

**NEW** → Please report the campaign goals for the entire system.

# New donor categories

**ADDED**

	Total in group	Number of donors	Total production
Physicians		<input type="text" value="0"/>	<input type="text" value="0"/>
All employees (non-physician)	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Auxiliaries and support groups		<input type="text" value="0"/>	<input type="text" value="0"/>
All other individual donors (including board members that do not fall into other categories)		<input type="text" value="0"/>	<input type="text" value="0"/>
Government entities (through public support)		<input type="text" value="0"/>	<input type="text" value="0"/>
Business and corporations		<input type="text" value="0"/>	<input type="text" value="0"/>
Corporate foundations		<input type="text" value="0"/>	<input type="text" value="0"/>
Family foundations		<input type="text" value="0"/>	<input type="text" value="0"/>
Private foundations		<input type="text" value="0"/>	<input type="text" value="0"/>
Other (describe below)		<input type="text" value="0"/>	<input type="text" value="0"/>
<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Total	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

# New donor categories

	Total in group	Number of donors	Total production
<b>ADDED</b> Entity executive team	<input type="text"/>	<input type="text"/>	<input type="text"/>
System executive team	<input type="text"/>	<input type="text"/>	<input type="text"/>

# Section E. Gift and Donor Activity



# Solicitation mailings and education initiatives

Do you have the following programs for solicitation mailings and education initiatives?

	A formal marketing program	Seminars for donors	Seminars for professionals	A marketing or prospecting program	A website for online gifts
Yes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
No	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Simplified to “Yes” or “No” questions

# Appeals

Do you have programs centered around any of the following listed appeals?

	Yes	No
Acquisition direct mail	<input type="radio"/>	<input type="radio"/>
Renewal direct mail	<input type="radio"/>	<input type="radio"/>
Lapsed direct mail	<input type="radio"/>	<input type="radio"/>
Telemarketing	<input type="radio"/>	<input type="radio"/>
Online and internet solicitation	<input type="radio"/>	<input type="radio"/>
Gift club	<input type="radio"/>	<input type="radio"/>

Simplified to “Yes”  
or “No” questions

# Special events

Do you have either of the following special events?

	Yes	No
Revenue generating events	<input type="radio"/>	<input type="radio"/>
Stewardship events	<input type="radio"/>	<input type="radio"/>

- REMOVED**
- Highly structured events
  - Sporting events
  - Large scale community-based events

Simplified to “Yes” or “No” questions

# Donors who gave to donor-advised fund

	Number of Donors	Total Production
Annual fund		
<b>ADDED</b> → Donor-advised fund		

# Other changes

- **Removed**
  - Number of professional contacts to attorneys, certified public accountants, trusts officers, insurance agents, and other professional community members
  - Number of planned gift proposals

# Section F. Use of Funds

# Use of Funds

- Capital
- Research
- Education
- Programs
- Charity care
- Grants to outside organizations
- Other

Combined to one from “Capital: Construction and renovation” and “Capital: Equipment”

## REMOVED

- Patient care program support
- Hospice/Home-health/Long-term care
- Community support/Advocacy
- General operating support
- Employee funds

# Additional changes

- Other income removed (interest income and endowment income)
- Program emphasis section removed



# Section G. Expenses (Detail vs Summary)

# Expenses in Detail

## Direct and Indirect Compensation Expense

# Direct Compensation Staff

- Chief Philanthropy/Development Officers - System
- Chief Philanthropy/Development Officers - Entity
- Vice Presidents/Directors of Philanthropy/Development
- Annual Gifts Staff
- Major Gifts Staff
- Campaign Gifts Staff
- Planned Gifts Staff
- Corporate/Business/Foundation Gifts Staff
- Governmental Gifts Staff
- Special Event Gifts Staff Generalist Gifts Staff
- Other Direct Fundraising Staff

Separated into two

Changed from “Public Support”

## RELOCATED

- Prospect Research
- Grant Writing

# Indirect Compensation Staff

- Fundraising Support Staff
  - Communications/Marketing/Public Relations
  - Operations
  - Information Technology
  - Gift Receipting
  - Data Manager/Analyst
  - Human Resources
  - Stewardship/Donor Relations Support Staff
  - Grant/Proposal Writers
  - Prospect Researchers
  - Finance/Accounting
  - Data Entry
  - Philanthropy/Development Coordinator
  - Executive Coordinator/Administrator/Assistant/Clerical/Secretarial
  - Other Indirect Fundraising Staff
- Condensed from executive support and fundraising program titles (CDO support, CP support, Annual gifts, major gifts, etc.)
- Changed from “Marketing” and “Public Relations”
- Changed from “Grant Writing” and “Writing (general)”
- NEW**
- NEW**

# Example

## Expenses for CDO/CPO in Old Survey

	Chief Development/Philanthropy Officer	...
Number of Staff		
Compensation		
Tenure		
Annual Gifts		
Major Gifts		
Corporate/Foundation Gifts		
Planned Giving		
Public Support		
Special Events		
Other Fundraising		
Fundraising Administration		
Non-Fundraising Administration		

# Example

## Expenses for CDO/CPO in New Survey

	Chief Development/Philanthropy Officer	...
Number of Staff		
Compensation		
Tenure		
Fundraising/Donor Cultivation		
Fundraising Administration		
Stewardship		
Board Management		
Prospect Research		
Grant Writing		
Communications/Marketing/PR		
Data Analysis		
Data Entry		
Other		
Non-philanthropy		
Non-fundraising Administration		

**NEW**

# Expenses in Detail

## Non-Compensation Expense

# Example

## Non-compensation Expenses in Old Survey (formerly titled “Non-Operational Labor Expenses”)

	Total Expense	Annual Gifts %	Major Gifts %	Corporate/ Foundation Gifts %	Planned Giving %	Public Support %	Special Events %	Other Fundraising %	Fundraising Administration %	Non-Fundraising Administration %
Professional Fees										
Contracted Services										
Rent/ Occupancy										
Supplies										
Travel/Dues/ Subscriptions										
Other cultivation Expenses										



# Example

## Non-compensation Expenses in New Survey

	Total Expense
Professional Fees	
Contracted Services	
Rent/Occupancy	
Supplies	
Travel	
Dues/Subscriptions/Membership	
Software Subscriptions/Maintenance	
Printing/Postage/Mailing	
Other cultivation Expenses	

Separated into two

NEW

# **Direct Compensation Expenses, Indirect Compensation Expenses, and Non-compensation Expenses (Summary)**

# Expenses in Summary

## Direct, Indirect, and Non-Compensation Expense

# Example

## Non-compensation Expenses in New Survey

	Expenses	Number of FTEs
Direct Compensation Expense		
Indirect Compensation Expenses		
Non-compensation Expense		N/A
Total Fundraising Expense		N/A