

Hit the Reset Button for Mid-Year Goal Setting

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“Life can only be understood backwards, but it must be lived forwards.” – Soren Kierkegaard

At the start of the new year, did you declare your 2022 goals? Did you anticipate the year ahead, assess your resources and draw up plans for a successful next chapter? Or did you look backwards and wonder what you can possibly accomplish after all you’ve tackled lately?

After the past two years, I’m assuming this was a rather difficult task, knowing most plans and goals may have felt like a waste of time once the pandemic assumed everyone’s attention. COVID disregarded tradition and reminded us that the health care industry has been anything but normal. In fact, the predominate normal in health care is constant change at breakneck speed and, as philanthropy leaders, you must be ready to pivot to meet the needs of your organizations.

Goal setting, however, is not impossible in this fluid environment. I suggest you take a slightly different approach—don’t just focus on establishing and meeting your metrics but also seek alignment with leadership, projects and donor priorities. While it may sound complicated, it doesn’t have to be. Your hospital leadership has many of the same goals as your philanthropy team. While there may be differing opinions about how to reach them, it is possible to not only determine strategic priorities but to also align them with donors’ passions and priorities. Philanthropy teams must be the connectors to bringing together hospital initiatives and donor support.

These questions can get you started as you consider project selection, funding priorities, leadership involvement, donor pipeline and relationship cultivation:

1. What have we accomplished so far this year?
2. What's changed since the beginning of this year?
3. What's coming down the pike in the near future?

Now, close your eyes. Envision you and your team 12 months from now. Imagine your team thriving. What does it look like? How often do you meet with executive leadership? How are you involving clinician champions? What passions and goals have you uncovered when meeting with donors? What news are you sharing with them as you cultivate relationships? What new resources are you utilizing? Who is sitting around the table with you? Make notes of what's different about what you envision and what needs to change to make that happen.

Visualizing your team's future success and the path forward is an important part of goal setting. You must imagine the future you want in order to obtain it.

Now, hit the reset button on your goals based on where you want to be a year from now. Focus on gaining buy-in from your organization's leadership and your team.

Here are some sample goals:

- Pull together a small team with members from the C-Suite, clinician champions and your philanthropy team to determine all possible strategic funding priorities and develop your messaging around these priorities.
- Identify your go-to clinician champions who can speak to these priorities and join you on donor visits.
- Meet with 3 prospects/donors a week to discuss their purpose, passions and philanthropic goals.



A robust process that identifies, pressure tests and prioritizes potential funding opportunities helps align your organizational needs with your philanthropic resources. [Strategically Aligned Project Selections™ \(SAPS\)](#) brings together key stakeholders who help ensure the most important hospital initiatives are determined. You, as philanthropy leaders, can then set goals to meet those needs. This type of process elevates what is most important, even in an ever-changing health care environment.

Remember, health care is an ever-evolving industry, but your role in meeting institutional goals shouldn't be. Philanthropy has the power to be the game changer once your team's goals and work is aligned with organizational priorities.

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