



20 QUESTIONS TO DRIVE SUCCESS

Philanthropy organizations are on a constant race to improve efficiency, effectiveness and impact. As you consider ways to more vibrantly fulfill your organizations' mission, here are twenty questions from business thought leaders and our Accordant Philanthropy experts to focus your inquiry around what your organization can do to move the dial.

Core Fundamentals

Almost 25 years ago, Peter Drucker challenged nonprofits to consider five essential questions to shape their organization and objectives. ⁽¹⁾ Today, his questions remain just as relevant:

- What is our mission?
- Who is our customer?
- What does the customer value?
- What are our results?
- What is our plan?

Often, health care philanthropy organizations have not adequately answered these simple questions. For example, even the simple question of "who is our

customer" is often unclear and can result in a jumble of unclear objectives and meaningless communication to unclear target markets. Therefore, it is essential to consider who you serve, how you serve them, the value they seek and the relative importance of each constituency to achieving your mission.

Elements of Success

Business leadership thinker Jim Collins has also called for introspection and for conscious choice of our future path. He shares, "Greatness is not a function of circumstance. Greatness, it turns out, is largely a matter of conscious choice and discipline." ⁽²⁾ As context, he shares a triple litmus test for achieving greatness that includes: ⁽³⁾

- **Superior Results** – effectiveness and efficiency in delivering on the social mission.
- **Distinctive Impact** – a unique, valuable and hard-to-replace contribution to those served
- **Lasting Endurance** – ability to prosper over a long period of time despite the obstacles.

20 QUESTIONS TO DRIVE SUCCESS

When you consider Collins' three prongs to success:

- How do you stack up in terms of industry financial and performance benchmarks that demonstrate efficiency and effectiveness?
- What are you doing to ensure your organization has the leadership, strategic plans and resources to drive success, impact and sustainability?

The Key Catalyst

Amazon CEO Jeff Bezos has emerged as one of business' most provocative new thought leaders. While Bezos has been known to philosophize on a variety of key tenets of business, he says his touchstone is always about ensuring his company is led by the right people at all levels of the organization. To that end, his test for assessing future hires boils down to three key questions: ⁽⁴⁾

- Will you admire this person?
- Will this person raise the average level of effectiveness of the group they're entering?
- Along what dimension might this person be a superstar?

With purpose-driven people as the lifeblood of our relationship-based efforts, these questions are not only applicable to those who seek to serve on the philanthropy team but also to those board members, physicians and allies we aim to engage in our work. In short, qualities like excellence and passion always maintain or raise the bar—and the cost of mediocrity and half-heartedness provides a dampening effect on others that is just too costly to assume. So, be thoughtful and judicious in the choice of all the allies you seek to engage around your vibrant table.

When it comes to the philanthropy team, push further and also consider the following as you successfully navigate the paradigm shift from an old era of "fundraising" to a new era of relationship-driven philanthropy:

- Do you have the right frontline people on your philanthropy team to thrive as health care organizations enhance their relationship-based giving programs in partnership with physicians, executives and other allies?
- While relationships rule, the backbone of support achieved by agile use of data and process is more important than ever before. Do you have people with the right skill set (and have enough of those people) to adequately support and inform excellent work?
- Are you giving the talent you have the training, coaching, tools and support to achieve superstar status?

Setting Strategic Direction

It is imperative to know where you are going...and why you are going there. However, too many foundations suffer from a lack of articulated strategy. Often, what is done in the year ahead is dictated by what was done in the year prior coupled with the outlines of the current budget and the false confidence that philanthropy is mentioned in a single bullet in the hospital's comprehensive strategic plan.

While this pile of crutches can offer the health care philanthropy organization a direction--it is not a strategic one. Therefore, consider how you can up your strategic game by deliberately and thoughtfully outlining on paper where the organization must go to achieve its vision of potential. Simply, strategic planning helps organizations identify important priorities that will fulfill the organization's mission and vision. Strategic planning also helps an organization determine who is accountable for getting the organization where it needs to go. In short, having a plan provides focus and prioritization to the best use of time, money and relationship equity to move the organization in a clear direction rather than letting it get beaten about due to the crisis or whims of any given day.



20 QUESTIONS TO DRIVE SUCCESS

- Does your organization have a current, written, comprehensive, strategic plan that is specifically focused on advancing philanthropy?
- In refining your strategic aim, consider the admonition of strategy guru Michael Porter who said the “essence of strategy is choosing what not to do.” What sacred cows are you protecting out of sentiment or comfort that need to go...and what must be stopped to allow you to redirect the time, energy, resources and focus to better opportunities?

Operationalizing Excellence

How you focus your talent and budget on an annual basis matters. Is your development program focused on current priorities in the field...or are you stuck in the rut of doing what you have always done?

- Annual giving is now less about money and more about driving donor loyalty and building a pipeline of prospects for investment level giving. Is that what your program is designed to do?
- Relationship-based giving through major gifts and planned giving are robust in both meaning and ROI. Is pursuing real relationships positioned as the heart of your giving program?
- Those who have experienced the mission in action—patients and families—tend to give more generously to hospitals. What are you doing to ensure you are connecting with these critical stakeholders and with physicians, nurses and others who shape their care experience?
- Campaigns remain a key lever to accelerate giving and to kickstart high performance fund development. What are you proactively doing to plan for or execute upon a campaign?
- Boards and other leadership volunteers have outsize credibility and influence in connecting others to the mission. However, many say they lack a clear call to action or the tools to be successful. What specific steps will you take this year to engage them?

As your organization positions to pursue excellence, take the time to reflect, evaluate, question and plan your way to success.

(1) Drucker, Peter F., James C. Collins, Philip Kotler, James M. Kouzes, Judith Rodin, V. Kasturi Rangan, and Frances Hesselbein. 2008. The five most important questions you will ever ask about your organization. [New York]: Leader to Leader Institute.

(2) Collins, James C. 2001. Good to great: why some companies make the leap ... and others don't. New York, NY: HarperBusiness.

(3) Collins, James C., and Jerry I. Porras. 1997. Built to last: successful habits of visionary companies. New York: HarperBusiness.

(4) “Jeff Bezos Says You Should Ask Three Questions Before Every New Hire, Jessica Stillman, Inc. Magazine, October 26, 2017, <https://www.inc.com/jessica-stillman/jeff-bezos-says-you-should-ask-these-3-questions-before-every-new-hire.html>

About the Author:

Betsy Chapin Taylor, FAHP, is the president of Accordant Philanthropy. You can reach her at Betsy@AccordantPhilanthropy.com.

TURN KNOWLEDGE INTO ACTION AT:
www.AccordantPhilanthropy.com



SERIES

 **Accordant**
philanthropy

© 2018. All rights reserved to Accordant Philanthropy.