

I. Background:

Founded in 1866, Laguna Honda has provided San Franciscans compassionate and dedicated services for over 150 years. Today, as part of San Francisco Health Network, the Department of Public Health's integrated delivery system, Laguna Honda is an acute care hospital with a rehabilitation center and skilled nursing programs, specializing in post-acute care, behavioral health, dementia care, geriatric care, palliative care, positive care, rehabilitation, respite care and complex skilled nursing.

The five year strategic plan (2016-2021) for the hospital includes a goal of philanthropy, which is the ability to receive money and give back to Laguna Honda community and San Franciscans needing services at Laguna Honda. In order to attract interest in donations and philanthropy for Laguna Honda, the organization needs effective avenues for promoting the good work being done at the hospital and the potential that could be realized through enhanced financial and/or philanthropic resources.

II. Current Conditions:

- ❖ Laguna Honda programs and services are funded by the operating budget determined by the City and DPH. In addition, there are 4 funds available that provide additional sources of funding to enhance resident program and staff development.
 - 1) Gift Fund is managed by Laguna Honda's Accounting Department. The purpose is for the general benefit and comfort of Laguna Honda residents (SF Administrative Code Section 10.100-201).
 - 2) Quality Improvement and Staff Development Fund is through the generosity of Dr. Milka Rols, the donation is managed by Laguna Honda's Accounting Department. The purpose is to provide support for performance improvement and staff development initiatives that promote quality outcomes.
 - 3) Friends of Laguna Honda (FLH) is a non profit 501 (c) 3. The purpose is to provide funds and sponsor events to enrich the quality of life for Laguna Honda residents.
 - 4) San Francisco Public Health Foundation (SFPHF) is a non profit 501 (c) 3. The purpose is to provide funds to support Laguna Honda community. Memorandum of Understanding was signed in 2016 as part of the Philanthropy Strategic Goal.
- ❖ Laguna Honda promotional materials were developed in 2010 and has not been updated since.
- ❖ In preparation for the move to the new hospital in 2010, an Ambassador Program provided designated staff members information to communicate and share with colleagues, peers and residents. This program served its purpose and does not exist today.
- ❖ Philanthropic events are planned at the neighborhood level based on their clinical specialty without assistance from Administration or the greater campus community.

Problem Statement: The hospital has not updated its promotional material, has not aligned philanthropic activities and does not have standard work for donations or accessing funds, thus creating confusion among donors and staff.

III. Goals:

- 1) Identify annual philanthropic initiatives for 2017 by January 30, 2017. **(completed)**
 - 2) Conduct all the scheduled philanthropic activities and initiatives each calendar year (December 31, 2017). **(completed)**
 - 3) Create a cadre of ambassadors to highlight Laguna Honda's impactful role in building healthier lives of San Franciscans by December 2017. **(deferred)**
 - 4) Promotional materials will reflect updated and accurate information by July 1, 2017. **(completed)**
- Target:** Establish a successful and sustainable philanthropy program. **(ongoing partnership with SFPHF)**

IV. Analysis: Factors identified as contributing to the problem statement

<p><u>Receiving Money</u></p> <ul style="list-style-type: none"> ❖ Donor confusion as to where to donate money for Laguna Honda ❖ Donors want to give directly to patient needs ❖ Past problems of not having a 501(C) 3 to raise money to support initiatives for staff ❖ No consistent way to recognize donors ❖ No effort to engage active donors to be involved and to donate more ❖ Donors want to see results 	<p><u>Barriers to Accessing Funds</u></p> <ul style="list-style-type: none"> ❖ Without a bank account for some events, money has to be in cash ❖ Different sources have restrictions on how money can be spent ❖ Once money is donated to a specific fund, there is not always a good process to spend it appropriately 	<p><u>Public Relations</u></p> <ul style="list-style-type: none"> ❖ Negative perceptions from regulatory findings ❖ Negative media (past and present) ❖ Sought after locations for tours from local, national and international groups ❖ Fragmented sources of who coordinates the tours
<p><u>Philanthropic Events</u></p> <ul style="list-style-type: none"> ❖ No common definition or purpose to philanthropic events ❖ Different groups in Laguna Honda plan events for different purposes ❖ Communications of activities are fragmented 	<p><u>Communication Materials</u></p> <ul style="list-style-type: none"> ❖ Promotional materials (website, brochures, fliers etc) have not been updated consistently ❖ Lagunahonda.org website shows multiple locations to donate money and is confusing ❖ No simple document telling potential donors of their options 	

V. Recommendations / Proposed Countermeasures:

Root Cause	Countermeasure	Description	Impact	Effort
Receiving Money	Standardize Donor Recognition	If we create a standard donor recognition program then all donors will be appropriately recognized.	Medium	Medium
Barriers to Funds	Laguna Honda Fund	If we establish donation and funding guidelines with SF Public Health Foundation, then we can receive money and funding initiative otherwise restricted from other sources.	High	Medium
Barriers to Funds	Philanthropic Beneficiaries List	If we develop a beneficiaries list, then we can prioritize and evaluate potential philanthropic opportunities and how the money will be spent.	Medium	Medium
Public Relations	Promotional Materials (general)	If we develop general Laguna Honda promotional material, then it will provide the public with current information about our services.	Medium	Medium
Public Relations	Promotional Materials (donation)	If we develop donation specific Laguna Honda promotional material, then possible donors will learn about the hospital and donation sources.	Medium	Medium
Public Relations	Ambassador Program	If we train selected Laguna Honda members to disseminate positive knowledge about Laguna Honda to stakeholders, then our image and reputation in the community and within the campus community can improve and align with our quality outcomes.	Medium	Medium
Philanthropic Events	Calendar of Events	If we develop an annual and ongoing schedule of philanthropy events, then we can plan each event and information Laguna Honda and great community.	Low	Low

VI. Plan: Listed in chronicle order by due date

Countermeasure	Description	Owner	Due Date	Status
Philanthropic Beneficiaries List	Make categories and list of projects/initiatives that can benefit from philanthropic support.	Mivic H	Sept 15 2016	Completed
Public Relations	Leverage 150 Year Anniversary Event as a civic event for the City and gain internal and external ambassadors and supporters of Laguna Honda.	Quoc N, Mivic H, Rachael K, Barbara G	October 15 2016	Completed
Laguna Honda Fund	Standardize procedures and forms using SF PHF guidelines.	Penny	Jan 30 2017	Completed
Calendar of Events	Create a list of philanthropic events list throughout the year. Summary of 2016 events. Upcoming 2017 events.	Mivic H	Feb 15 2017	Completed
Philanthropic Beneficiaries List	Create and operationalize Molly's Fund A3 to disperse the funds (part of the Gift Fund).	William F	March 7 2017	Completed and Ongoing per A3
Standardize Donor Recognition	Create a spreadsheet tracking how donors are recognized by the appropriate fund.	Elizabeth S	March 31 2017	Completed
Promotional Materials	Update Laguna Honda brochures.	Quoc N	April 30 2017	Completed
Ambassador Program (tours)	Establish standard workflow for coordinating tours.	Quoc N	April 30 2017	Completed
Donor recognition	Update Art of Giving in Hospital Lobby (maintained by FLH). Develop a brochure about the wall and the donating options.	William F	June 30 2018	Pending – will be a JDI
Promotional Materials	Update Laguna Honda website and social media.	Quoc N	June 30 2017	Completed
Ambassador Program	Create an ambassador program for employees and volunteers. Embed sustainability into the project.	William F	June 30 2017	On Hold, Refer to PI Storyboard

VII. Follow-Up

Regular meetings with committees & stake holders (Philanthropy workgroup, Public Health Foundation, Friends of Laguna Honda)

Review financial reports from all funding sources: Gift Fund Committee, Scheduled Meetings with SFPHF, Annual Donations Report to Health Commission.

Document media coverage for all events: Ongoing as part of Strategic and Performance Management Department's standard work.

Revisit and review the calendar of events and philanthropic beneficiary annually and as needed.