Securing Corporation & Foundation Support for Clinical Programs

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LOYOLA UNIVERSITY MARYLAND
The Loyola Clinical Centers
- Founded in 2003
- Merged together speech-language pathology clinics already in existence with fledgling psychology clinic
- Addition of Literacy in 2005
- Addition of Pastoral Counseling in 2008
- Interdisciplinary synergy
- Shared resources
- Jesuit tradition: called to serve the underserved

LOYOLA UNIVERSITY MARYLAND
Mission
- State-of-the art graduate clinical training and education
- Direct provision of service to the community
- Research and scholarship

Three Locations
- Belvedere Square
  - Audiology, Psychology, Speech-Language Pathology
- Columbia Graduate Center
  - Speech-Language Pathology, Pastoral Counseling
- Loyola/Notre Dame Library
- Literacy
- Off-site services at numerous Catholic Schools
  - Audiology, Speech-Language Pathology, Psychology and Literacy

Service Provision: FY 2009-10

<table>
<thead>
<tr>
<th>Location</th>
<th># of Unique Clients</th>
<th># of Unique Visits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belvedere Square</td>
<td>669</td>
<td>5,113</td>
</tr>
<tr>
<td>Columbia</td>
<td>314</td>
<td>3,448</td>
</tr>
<tr>
<td>TOTAL</td>
<td>973</td>
<td>8,561</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Service</th>
<th># of Clients</th>
<th># of Client Visits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Speech</td>
<td>511</td>
<td>5,838</td>
</tr>
<tr>
<td>Psychology</td>
<td>219</td>
<td>2,316</td>
</tr>
<tr>
<td>Audiology</td>
<td>176</td>
<td>269</td>
</tr>
<tr>
<td>Literacy Scholars</td>
<td>59</td>
<td>59</td>
</tr>
<tr>
<td>Pastoral Counseling</td>
<td>8</td>
<td>79</td>
</tr>
<tr>
<td>TOTAL</td>
<td>973</td>
<td>8,561</td>
</tr>
</tbody>
</table>

Please note:
- Some programs, such as Literacy Scholars, are billed on a one unit basis despite being seen over a period of time which falsely lowers the # of visits
# Students Trained/Educated AY 2009-10

<table>
<thead>
<tr>
<th>Division</th>
<th># of Students Trained/Educated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Literacy Scholars</td>
<td>13 M.Ed. (Summer)</td>
</tr>
<tr>
<td>Pastoral Counseling</td>
<td>21 M.Ed. (Fall &amp; Spring)</td>
</tr>
<tr>
<td></td>
<td>1 Ph.D.</td>
</tr>
<tr>
<td>Psychology</td>
<td>11 M.S.</td>
</tr>
<tr>
<td></td>
<td>8 M.S.</td>
</tr>
<tr>
<td>Speech-Language Pathology</td>
<td>64 (First year M.S.)</td>
</tr>
<tr>
<td></td>
<td>30 (Second year M.S.)</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>177</strong></td>
</tr>
</tbody>
</table>

# Overview of Advancement

**Centralized vs. Decentralized**

- Centralized: individuals responsible for fund-raising are housed in one physical location and report either directly or indirectly to the same person.
- Decentralized: development officers are spread out among various academic units of the institution. Fund raisers of school/colleges report to the deans of their respective areas.
- A hybrid model mixes the centralized and decentralized, with development officers physically located in a college or school yet reporting to both a dean and a chief development officer.

# 5 Steps to Success

1. Development of a respectful and collaborative relationship between your clinic and Advancement.
2. Clinic’s ability to clearly communicate its mission, needs, targets for growth/expansion, and financial activities.
3. Good searches with an eye on the “match” by Advancement.
4. Community involvement and community recognition of the clinic.
5. Successful management and stewardship of a corporate or foundation grant.

# Communicating your mission, needs...

- Mission Statement
- Vision Statement
- Strategic Plan
  - One for your clinic
  - Can you align yourself with or become part of the University’s strategic plan? [http://www.loyola.edu/strategic_plan/initiatives/index.html](http://www.loyola.edu/strategic_plan/initiatives/index.html)
  - #Geducation
  - Form strategic alliances with other departments (P.T., O.T., education, medical school, nursing...)
- Budgets & Financial Statements
Success in Finding the “Match” & Securing Funding

- Know your program
- Research prospects (use proper tools)
  - Foundation Center
  - 990’s [http://fconline.fdncenter.org](http://fconline.fdncenter.org)
  - Annual Reports
  - Community Engagement
- Discover synergies among values, mission, and goals

Securing Funding (cont.)

- Build the relationship
- Site visits
- Cultivation meetings
- Special events
- Proper stewardship
- Involve the appropriate institutional members
  - Department chairs, faculty, deans, VP’s, students

Examples at the LCC

- Merritt Properties
- Bank of America
- Raskob Family Foundation
- Horizon and Columbia Foundations
  [www.thehorizonfoundation.org](http://www.thehorizonfoundation.org)

  [http://thehorizonfoundation.org/ht/d/sp/display/ArticleDetail/V25751/pid/1106](http://thehorizonfoundation.org/ht/d/sp/display/ArticleDetail/V25751/pid/1106)

Community involvement & recognition

- Don’t Hide!!! Need recognition of your clinic both by both internal and external audiences
  - Website
  - Annual report
  - Testimonials
  - Media Plan
  - [http://www.loyola.edu/clinical-centers/](http://www.loyola.edu/clinical-centers/)
- Join key associations, groups, agencies
- Partner with other local human service providers (this is often favored by Foundations)

Managing the Grant

- Proving that your organization can successfully manage a grant is key in gaining continued success in the Corporation & Foundation world
- Collaboration between Advancement staff and clinic faculty/personnel is essential
- Be careful with the budget and expenditures
  - Audit trail
  - Someone providing oversight
- Be aware of reporting/program evaluation expectations and be prepared with data

Donor Stewardship

- Deliver what you promise – measurable outcomes
- Meet and exceed grant reporting requirements
- Keep in contact with the donor – even when you are not looking for funding!
- It is a continuous process
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