

Project Brief

TEMPLATE

Use this form to lead your staff in identifying meaningful projects that can be translated into successful fundraising priorities.

Asking the right questions on the frontend of fundraising will ensure fundraising project hold the right mix of donor appeal and ability for the project to be accomplished on-budget and on-time to maximize stewardship of funds. Using this form also reinforces how you plan to use your project staff to identify humanizing stories that build a compelling case for support.

PRO TIP: Print and use this form to guide your discussion with clinical leaders. Want to tweak this form? An editable Microsoft Word version of this Project Brief is included in your resource bundle.



Project Brief

Project Overview

| | |
|---|-----------------------|
| Project Owner / | Service Line / |
| Project Name / | |
| Description (i.e. what will this project do in layman's terms) / | |
| Good Faith Estimate of Project Cost / | |
| Type / <input type="radio"/> Equipment <input type="radio"/> Program <input type="radio"/> Renovation <input type="radio"/> Staffing <input type="radio"/> Other | |

Case for Support

| |
|--|
| Why is this project crucial to patients in your service line? / |
| What will this funding allow you to do for patients that would otherwise be unattainable / more difficult / etc.? / |
| Approximately how many patients will be impacted? / |
| Why are your service line employees excited about this project? / |

Tracking

| |
|--|
| If funded what is the expected timeframe for completion? / <input type="radio"/> 3 Months <input type="radio"/> 3-6 Months <input type="radio"/> 6-9 Months <input type="radio"/> 9-12 Months <input type="radio"/> 12+ Months |
| Who will track your project's impact on patient lives? / |

Project Brief *Example*

Project Overview

| | |
|---|------------------------------------|
| Project Owner / <i>Dr. Joe Hart</i> | Service Line / <i>Heart</i> |
| Project Name / <i>Healthy Hearts, Healthy Minds</i> | |
| Description (i.e. what will this project do in layman's terms) / <i>We seek to launch a program that provides our cardiovascular patients with take-home monitoring devices to track their cardiovascular health. We also will provide onboarding and education on how to leverage the full benefits of the tools upon discharge.</i> | |
| Good Faith Estimate of Project Cost / <i>\$25,000</i> | |
| Type / <input checked="" type="radio"/> Equipment <input checked="" type="radio"/> Program <input type="radio"/> Renovation <input type="radio"/> Staffing <input type="radio"/> Other | |

Case for Support

| |
|---|
| Why is this project crucial to patients in your service line? / <i>We see so many re-admitted patients in our clinic who need help managing their health. Disease management education will keep our patients healthy.</i> |
| What will this funding allow you to do for patients that would otherwise be unattainable / more difficult / etc.? / <i>Because many of our patients are below the poverty line, many do not have knowledge or access to the tools needed to manage their chronic heart conditions. This program will help us break down those barriers.</i> |
| Approximately how many patients will be impacted? / <i>Our \$25,000 budget would serve 500 patients over the course of two years.</i> |
| Why are your service line employees excited about this project? / <i>Our patients are like family to our staff. We all want to see them live their best lives through health maintenance and empowerment.</i> |

Tracking

| |
|---|
| If funded what is the expected timeframe for completion? / <input type="radio"/> 3 Months <input checked="" type="radio"/> 3-6 Months <input type="radio"/> 6-9 Months <input type="radio"/> 9-12 Months <input type="radio"/> 12+ Months |
| Who will track your project's impact on patient lives? / <i>Our head nurse, Jackie Cardio will help you get what you need.</i> |