

2018 Friends of Fisher House Conference



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2018 Friends Conference

- 21 Previous Attendees
- 29 New Attendees
- 27 of 34 FOFH groups represented
 - 5 opened houses in last 7 Months
 - 5 finish houses in next 6 months
 - 2 Awaiting construction start in 2018



- Program Managers
 - VA
 - USAF & USN
- FHF Trustees

Conference Admin

- Restrooms
- Breaks & Meals

Presentation “House Rules”

- Time
- Questions
- Enter/Exit
- Attend & Participate
- Notes
- Critiques

Jennifer Koget VA FH

- 1 on 1

Capitol Tour

- Bus departs 8:30 Bell Lounge

8th & I USMC Evening Parade

- Head count



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Agenda

All presentations will be on the Mezzanine Level in Conference Rooms D & E

Thursday 23 August

- 8:30 **Admin Notes & Introductions – Brian Gawne, FHF**
- 9:30 **Group Exercise – Brian Gawne, FHF**
- 10:00 15-minute Break
- 10:15 **State of the Foundation – Dave Coker**
- 11:30 **FH Managers Training Debrief – Vicki Crowley**
- 12:00 Lunch
- 12:30 **VA FH Program Update – Jennifer Koget**
- 13:15 **USAF FH Program Update - Major Chris Weber**
USN FH Program Update– Pam Smith
- 14:00 **FOFH Community Group Update – Brian Gawne FHF**
- 1500 15-minute Break
- 15:15 **Websites for FOFH groups – Nick Mavrick (Guest Speaker)**
- 17:00 **Adjourn**

Friday, 24 August

- 8:00 **Nonprofit Audits, & Impact of New Tax Law for Non-Profits – Divya Gadre, Marc Berger, BDO USA LLP**
- 9:00 **Strategic Initiatives/Hero Programs – Tish Stropes, FHF**
- 9:45 **Communications & Media – Kerri Childress, FHF**
- 10:30 15-minute Break
- 10:45 **Insurance for Non-profits – Paul Waters, NFP Property & Casualty Services, Inc.**
- 11:45 Lunch
- 12:30 **FHF Development Update – Denise Dolan, FHF**
- 13:30 **“The Big Ask” & Transformational Giving – Sam Kennedy, FH Michigan**
- 1600 **Closing Remarks & Critiques, and Next Conference – Brian Gawne, FHF**



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Introductions

< 30 Seconds:

- Your Name
- Community Group
- Fisher House Supported
- Your role
-& something to remember about you



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Group Exercise

- What do you want your website to do?
- What content should it have?
- How will you manage it?



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FOFH Website Exercise

(Conference Attendee answers to Exercise)

Question #1

Question #2

Question #3



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2018 Friends of Fisher House Conference



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Since we last met...



Charleston, SC



Keesler AFB, MS



Orlando, FL



West Haven, CT



Dayton, OH



Palo Alto, CA (2nd house)



Cleveland, OH I & II



Togus, ME

Coming soon: Dayton, JBER & Tampa dedication ceremonyRichmond & Albuquerque group



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FH Construction Update

In Construction

- Tampa, FL (2nd)
- **Joint Base Elmendorf – Richardson, AK**
- **Bronx, NY (I & II)**
- **Cleveland, OH (I & II)**
- **Dayton, OH**
- Palo Alto, CA (2nd)
- Togus, ME

2018 Remaining Starts

- **Richmond, VA (2nd)**
- **Albuquerque, NM**

2019 Tentative Starts

- **Ann Arbor, MI**
- **Denver, CO**
- **New Orleans, LA**
- **Omaha, NE**

(Gold Font = FOFH Group)

Future Construction

- Bay Pines, FL (2nd)
- Birmingham, AL
- **Columbia, MO**
- **Columbia, SC**
- **Detroit, MI**
- Huntington, WV
- Kansas City, MO
- **Lexington, KY**
- Montrose, NY
- North Chicago, IL
- Perry Point, MD
- **Pittsburgh, PA (2nd)**
- Shreveport, LA
- Ramstein, Germany
- San Antonio, TX (2nd)
- San Juan, PR
- White River Junction, VT

Site Visit Complete

- Bay Pines, FL (2nd)
- Birmingham, AL
- Columbia, MO
- Columbia, SC
- **Detroit, MI**
- Huntington, WV
- Kansas City, MO
- **Lexington, KY**
- Montrose, NY
- North Chicago, IL
- Perry Point, MD
- **Pittsburgh, PA (2nd)**
- Shreveport, LA
- Ramstein, Germany
- San Antonio, TX (2nd)
- San Juan, PR
- White River Junction, VT



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Fisher Houses Without Community Groups

- VA
 - Albany
 - Augusta
 - Bay Pines
 - Dallas
 - Minneapolis I II
 - **Palo Alto**
 - **Portland**
 - Salt Lake City
 - San Antonio
 - Tampa
 - Washington DC



DoD

- Army
 - Forest Glen
 - Fort Belvoir
 - Fort Bliss
 - Fort Bragg
 - Fort Campbell
 - Fort Gordon
 - Fort Hood
 - Fort Sam Houston I II III IV
 - **Joint Base Lewis-McChord I II**
 - Landstuhl I II
 - Tripler I II
- Navy
 - Camp Lejeune
 - Portsmouth
 - Walter Reed I II III IV V



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WHY?

Why have community groups?

Mutually Beneficial

How Groups Help the Foundation

- Capital Campaign
- House Support
- Event Representation
 - e.g., WLGO, Cardinal Health
- Awareness
- Pay it Forward

How FHF Helps Groups

- Name
- Guidelines & Experience
- Friends Conference
- Development
 - Grant Assistance
 - Community Fundraisers
 - Donation Pages



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Starting a Community Group

- Existing Group

- e.g. Harbour House (Charleston), Build It For the Brave (Ann Arbor)
- Already has 501c3 status and own donor base
- FH fits their current mission

- New Group

- e.g. Columbia(s), Lexington, New Orleans,
- May or may not choose to file for 501c3
- Starting donor base from scratch

- Existing Group – 2nd house

- Denver
- Richmond
- Pittsburgh
- St Louis
- FH Michigan



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Fisher House Relationships



Directors' Concerns



Standards of Conduct

Individual Personalities

Public Opinion

**Historical
Preservation**

Local Government

Staffing

Budgetary Constraints

Human Relations

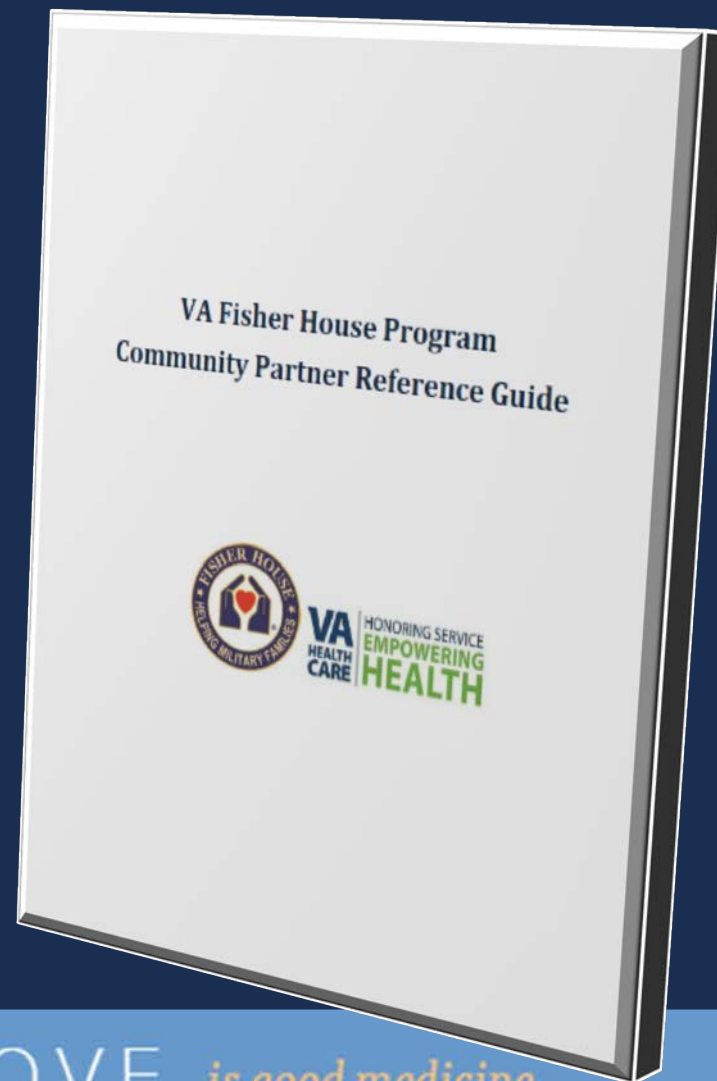
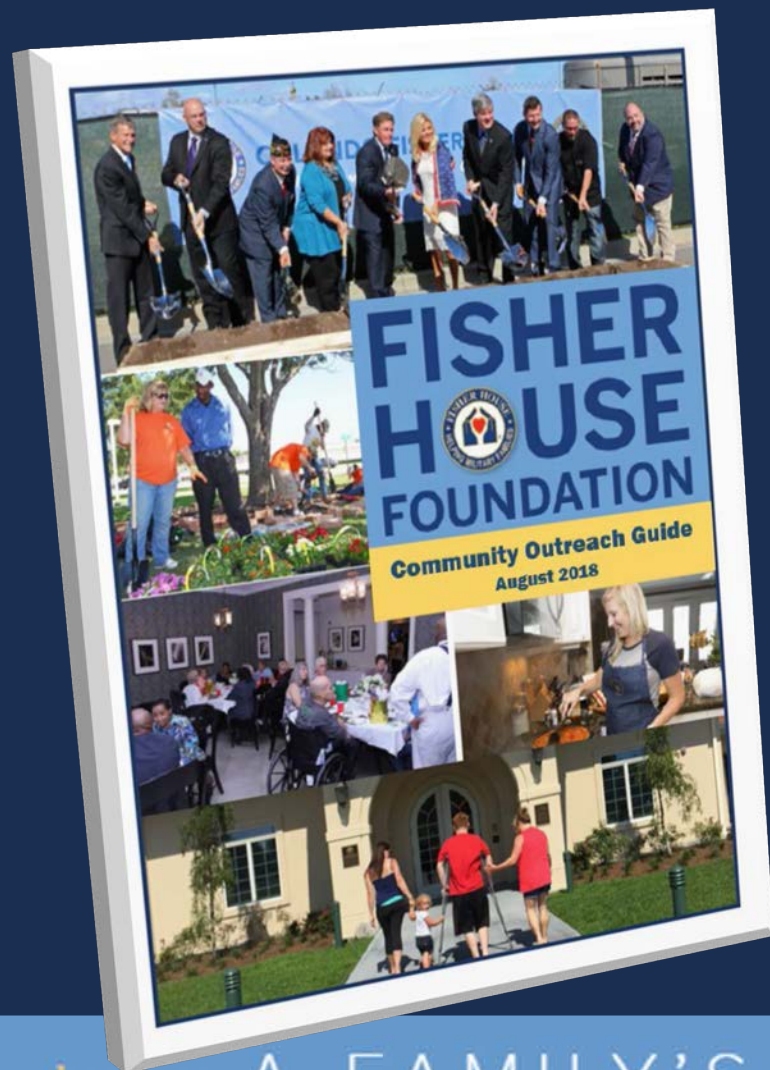
FEDERAL REGULATIONS

HIPPA Concerns

News Media

Other Construction
Projects

FHF and VA Guidance for Groups



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What's Covered

TABLE OF CONTENTS

- Forming the Board
- Who You Should Contact
- Fundraising Suggestions
- Gala's and Golf Tournaments
- Team Fisher House
- Media
- Market Related Sales
- Use of Logos
- Web site/Social Media
- Use of photos
- Promotional Print Materials
- Public Service Announcements (tv/radio)
- Grant Writing/Corporate Requests
- Gardens/Brick Campaigns
- Gifts in kind donations
- Request to sponsor events
- Cautionary Practices
- Annual 990 Tax Form
- Reports
- Miscellaneous
- What's next when campaign is over
- Final Thought

VA Fisher House Program

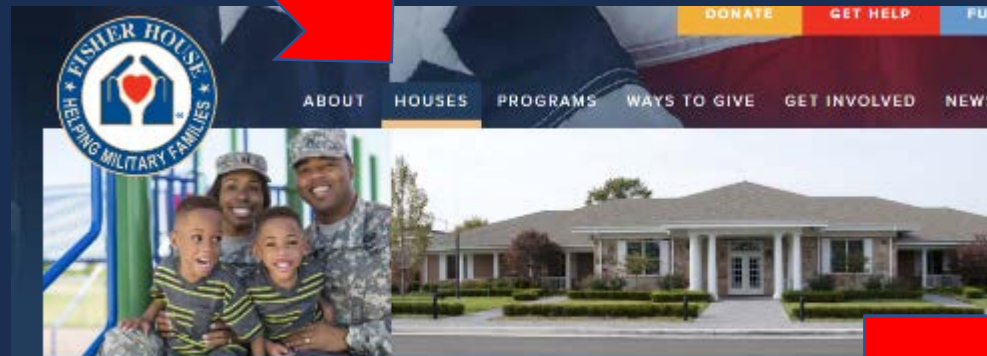
Index

- Introduction
- VA FH Program Eligibility
- VA FH Operations
- Relationship between VA FH Managers and Community Partners
- VA FH Donations
- VA FH Volunteer Management
- VA FH Public Affairs



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FH Community Group Webpage



Home / Programs /

Houses

- Current Houses >
- Future Houses >
- Managers >
- Community Groups >

A Fisher House is "a home away from home" for families of patients receiving medical care at major military and VA medical centers. The homes are normally located within walking distance of the treatment facility or have transportation available. There are 71 Fisher Houses located on 24 military installations and 29 VA medical centers. Many more houses are under construction or in design.

Home / Programs / Houses /

Community Groups

Foundation Resources:

- [Editable Fisher House Powerpoint Presentation](#)
- [Fisher House fact sheet \[pdf\]](#)
- [Fisher House Directory \[pdf\]](#)
- [Fisher House Brochure \[pdf\]](#) - no longer offered as editable brochure, we can mail to you if needed
- [Fisher House Social Media Sheet \[pdf\]](#)
- [25th Anniversary Sponsorship Packet \[pdf\]](#)
- [VA Fisher House Program Community Partner Reference Guide \[pdf\]](#)
- [Team Fisher House - Fundraisers who want to participate in an EXISTING athletic event to support your Fisher House can sign up \[HERE\]\(#\) and choose your house in the Team Fisher House registration process](#)
- [YouTube Video Links \(if you need a file version of one of these videos or another on the page please contact \[Ashley.aestill@fisherhouse.org\]\(mailto:Ashley.aestill@fisherhouse.org\)\)](#)

1. [A Hero's Story \(7:55\)](#) - Fisher House trustee Dale Beatty and his wife tell their Fisher House story from injury and beyond.
2. [My Fisher House Story \(1:02\)](#) - Ben and Grisselle Mitchell share their Fisher House story with explanation of Fisher House
3. [Hero Miles Bringing Families Together \(1:00\)](#) - PSA for Hero Miles
4. [Hero Miles Brings Two Brothers Together \(1:20\)](#) - Hero Miles story of the Galeazzi family

For questions please contact Brian Gawne
Community Relations,
bfgawne@fisherhouse.org
301-296-8560



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Community Group Support ..two phases

- Construction



- Sustainment



S LOV

Big Ticket Items



- Service Contracts:
 - Internet/Cable Contracts
 - Linen Contracts
 - Temp controlled Storage unit
 - Lawn/landscaping services
- Transportation Assistance
 - Taxis, Shuttles, Uber, etc.
- Assistance when VA/DoD response time is too slow
 - e.g., Washer/Dryer Repair
- Hotels when house is full or unique circumstances

- Building Projects
 - Sheds
 - Playgrounds
 - BBQ Patios

- Bricks
- Fountain
- BBQ Pits
- Van/Vehicle



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1 FOFH question approaching Dedication

- What will it cost us to support a house?
 - What is reasonable for program expenses?
 - ...admin expenses?
 - ...fundraising?

Common questions from new FOFH groups

- How big should our board be?
- How often should they meet
- Do we need a paid Executive/ Development Director?



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Our Data

Form 990 Return of Organization Exempt From Income Tax **OMB No. 1545-0047**

Under section 501(c)(3), 507, or 4947(a)(1) of the Internal Revenue Code (except private foundations) **2016**

Department of the Treasury Internal Revenue Service **Open to Public Inspection**

A For the 2016 calendar year, or for year beginning 2016, and ending 2016

B Check if applicable: Initial return Amended return Repealed return Multiple reporting

C Name of organization: DOJ Subtitle 20

D Employer identification number: _____

E Tax-exempt status: 501(c)(3) 501(c)(29) 501(c)(28) 501(c)(27) 501(c)(26) 501(c)(25) 501(c)(24) 501(c)(23) 501(c)(22) 501(c)(21) 501(c)(20) 501(c)(19) 501(c)(18) 501(c)(17) 501(c)(16) 501(c)(15) 501(c)(14) 501(c)(13) 501(c)(12) 501(c)(11) 501(c)(10) 501(c)(9) 501(c)(8) 501(c)(7) 501(c)(6) 501(c)(5) 501(c)(4) 501(c)(3)

K Name of organization: _____ **L** Year of formation: _____ **M** State of legal domicile: _____

Part I Summary

1 Briefly describe the organization's mission or most significant activities: _____

2 Check this box if the organization discontinued its operations or disposed of more than 25% of its net assets.

3 Number of voting members of the governing body (Part VI, line 1d): 3

4 Number of independent voting members of the governing body (Part VI, line 1b): 4

5 Total number of individuals employed in calendar year 2016 (Part V, line 2a): 5

6 Total number of volunteers (attach if necessary): 6

7a Total unrelated business revenue from Part VIII, column (C), line 12: 7a

7b Net unrelated business taxable income from Form 990-T, line 24: 7b

	This Year	Current Year
8 Contributions and grants (Part VII, line 1f):		
9 Program service revenue (Part VII, line 2g):		
10 Investment income (Part VII, column (A), lines 3, 4, and 7d):		
11 Other revenue (Part VII, column (A), lines 5, 6c, 6c, 9c, 10c, and 11d):		
12 Total revenue—add lines 8 through 11 (must equal Part VII, column (A), line 12):		
13 Grants and similar amounts paid (Part IX, column (A), lines 1–3):		
14 Benefits paid to or for members (Part IX, column (A), line 4):		
15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10):		
16a Professional fundraising fees (Part IX, column (A), line 11a):		
16b Total fundraising expenses (Part IX, column (A), line 11b):		
17 Other expenses (Part IX, column (A), lines 11a–11d, 11e–24a):		
18 Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25):		
19 Revenue less expenses. Subtract line 18 from line 12:		

20 Total assets (Part X, line 16): _____

21 Total liabilities (Part X, line 20): _____

22 Net assets or fund balances. Subtract line 21 from line 20: _____

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here _____

Paid Preparer (Use only if preparer is not the officer): _____



FISHER HOUSE FOUNDATION, Inc. 2016 EOY ANNUAL REPORT OF OPERATIONS

Organization Name _____

Address _____

Fisher House Supported _____

Chief Executive _____

Number of Board Members _____ Date of Last Board Meeting (MM/DD/YY) _____

Financial Results for the Fiscal Year Ending

Income: (A) \$ _____

Expenses:

Program: (B) \$ _____

Administrative: (C) \$ _____

Fundraising: (D) \$ _____

Total Expenses: sum (B+C+D) = (E) \$ _____

Surplus/Deficit: (A-E) = (F) \$ _____

Fund Balance:

At Beginning of Current Reporting Period (G) \$ _____

At End of Current Reporting Period (H) \$ _____

Date of last filing of 990(N), (EZ) (MM/DD/YY) _____

Amount of support provided to local Fisher House during your last fiscal year \$ _____

Amount of projected support to FH Foundation in coming year \$ _____

Please list campaigns you are registered with (e.g. CFC, United Way, etc.) _____

Short Narrative of Accomplishments During the Past Year:
(You may attach a separate sheet)




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FOFH Local House Support (Self reported)

- 12 of 24 Groups responded
- Avg Board Members 11
- Avg Support to FH
 - \$45K/year - \$3750/month
 - 3 groups \$3-\$15K year
 - 5 groups \$20-45k year
 - 2 groups \$75-85K
 - 2 group over \$100K



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 **FISHER HOUSE FOUNDATION, Inc.**
2016 EOY ANNUAL REPORT OF OPERATIONS

Organization Name _____
Address _____

Fisher House Supported _____

Chief Executive _____

Number of Board Members _____ Date of Last Board Meeting (MM/DD/YY) _____

Financial Results for the Fiscal Year Ending

Income: (A) \$ _____

Expenses:

Program: (B) \$ _____

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Fundraising: (D) \$ _____

Total Expenses: sum (B+C+D) + (E) (E) \$ _____

Surplus/Deficit: (A-E) = (F) (F) \$ _____

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Short Narrative of Accomplishments During the Past Year:
(You may attach a separate sheet)



How big is the Fisher House Enterprise?

$$\text{\$ FHF} + \text{\$ FOFH} + \text{\$ DoD FH} + \text{\$ VA FH} = ?$$

Is that number important?



As of 14 June 2019
VFW Posts and Auxiliaries
have contributed...



Over \$950,000 to Fisher House Foundation



...Not including direct support
to local Fisher Houses and
FOFH over the last 27 years



Ways Donor Give

To Community Group



To FHF



To the VA/DoD Fisher House



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What to Expect When You're Expecting



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New House Challenges: Surviving the First Year

FOFH Perspective

- Been the star until dedication
 - Sharing the limelight
 - Lead role to supporting cast
- Challenge: Shift emphasis from capital campaign to support
 - Switch from \$3M+ goal to ???

Manager's Perspective

- Establishing policies and precedents
- Hear all the great things from other managers
- Reluctant to ruin the relationship
 - ...and lose their support



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FH Community Groups and FH Managers - A Vital Relationship

- FH Manager's Responsibilities
- FOFH Responsibilities



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Business Rules & Good Practices

for FH Managers

- Up to date Wish List
 - Inform of Events
 - Involve VA's experts when needed
 - PAO
 - Facilities
 - Social Services
 - Set boundaries
 - Establish procedures
 - Assistance with Issues
 - VA/DoD Leadership & FHF
 - Support education about FH mission
- Don'ts
 - Allow board meetings in house
 - Give groups exclusivity
 - Participate in fundraising
 - Discuss personnel issues
 - Sell naming rights to rooms



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More thoughts for us...

- Appropriate Relationships
- Make No Promises about house
 - Donations
 - Eagle/Gold Scout Projects
- Gifts – Acceptance procedures
- Receipts & Acknowledgements



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Conflict Resolution with Medical Center

- Address concerns with respect
 - Clearly identify issue
 - Consideration of both sides
 - Governing laws and rules
- Talks with manager
 - Involve direct supervisor
 - Involve DoD/VA FH Program Manager
 - Hospital Director
- Keep FHF Informed
 - Allows us to assist
- Key considerations
 - Independent 501c3
 - Partnership vs Authority
 - Actions affect other parties
- Ask yourself...
 - Why is this an issue...to me...to them?
 - Can we find a win/win?
 - What is at risk?
 - What limiting factors? (regulations, \$\$\$, etc.)
 - How can we best benefit families?



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FHF Complaint Process

What happens when someone calls FHF to complain

1. Listen
2. Assess
3. Ask for concerns in writing
4. Notify DoD/VA FH Program Manager
5. Assist as appropriate
6. Inform our Chain of Command



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Fisher House Michigan shared a post.

8 hrs · 🌐

If anyone ever wonders where the "first" Fisher House in Michigan is... it's the Chick-Kerry household! 😄😄😄

We are so fortunate to have such passionate board members. This is not the first Soldier they've helped in a pinch, and we suspect it won't be the last. However, we are all anxious for our official Fisher House to arrive so up to 16 families can be housed at once!



Karen Diane Kerry is with Brad Chick and Haley Smith-Montoya. 19 hrs

It's not a Fisher House but high five to Emmet and the Montoya family for surviving open heart surgery and a week with Brad and Karen! We love you guys and admire how you have stood up to life's challenges! Come back next year and we will have a real Fisher House for you 🙌



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Critiques



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Thanks for all you do!!!!



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