

TEN QUESTIONS DONORS SHOULD ASK

WHEN MAKING GIFTS TO UNIVERSITIES WITH MEDICAL SCHOOLS OR HEALTHCARE EDUCATION PROGRAMS

DONORS MUST BE AWARE OF WHAT BENEFICIARY UNIVERSITIES ARE DOING IN ORDER TO HOLD THEM ACCOUNTABLE¹ FOR ACADEMIC EXCELLENCE IN TRAINING FUTURE DOCTORS AND HEALTHCARE PROVIDERS. HERE ARE SOME IMPORTANT QUESTIONS DONORS MUST ASK THE LEADERS OF THESE SCHOOLS.

- 1. I am very interested in supporting your work, but must receive assurances that my resources aren't going toward supporting programs and initiatives that are based on politicized ideologies. How can I add stipulations to my gift agreement?**

Stipulate that the school will receive the funds only after they provide the budget with line items showing where the funds will be applied. This provides the best protection for both the donor and the recipient, as there is a clear legal remedy if funds are spent on initiatives that the donor excluded.

A helpful resource for these stipulations is the Florida STOP WOKE Act,² which contains eight “unlawful employment practices” that provide clarity to the agreement. Always do your due diligence when conducting the pre-grant inquiry.

- 2. Medical school applicants who are invited to proceed to a secondary interview are required to complete the secondary application. What are the questions or essay topics this school uses for the interview?**

Medical school applicants that are chosen for a secondary interview are assigned questions or essays on topics of the school's choice. Some schools ask about a student's “dedication” to promoting concepts such as health equity or social justice. Ask for this information to be placed in the monitoring and evaluation report, as the questions often change from year to year.

- 3. What types of training related to “diversity, equity, and inclusion” or “implicit bias” concepts does this school require of students, faculty, or staff? What is the current budget for DEI programs at this institution?**

Some U.S. universities and medical schools are spending tens of millions of dollars on their DEI offices and social justice initiatives every year, and many of the related courses are mandatory for faculty, staff, and students. These courses do not contribute to the development of competent doctors, and take up a measure of the limited time that medical students have in the classroom. Consider asking about the number of staff members dedicated to DEI efforts, as well as the annual salary of the school's Chief Diversity Officer or equivalent position.



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4. Does this institution promote “anti-racism” in medical education? How much curricular time is spent on social justice or non-medical topics?

“Anti-racism” is a concept that maintains that the racism of the past must be reconciled with present and future racism. Within healthcare education, anti-racism seeks to create social justice activists who care more about identity politics than seeing patients as individuals.

5. Does this program sponsor scholarships or fellowships that are based on demographic characteristics (such as race or sex) instead of merit?

Scholarships, fellowships, internships, or mentoring opportunities (and other programs) that are awarded on the basis of race or sex violate federal law. Additionally, there has been a growing trend for medical colleges to lower the qualifications for entry to MD and DO programs, including waiving or lowering scoring thresholds for standardized testing.

6. What are the school’s plans to add to or expand any of the above initiatives in the future?

While some states have passed legislation that prohibits DEI in its institutions of higher education, there has been a recent trend of simply rebranding the name of the office or dispersing the same personnel into other administrative roles. Seek clarification on the names and oversight of DEI offices, keeping in mind that many medical schools have their own DEI offices (in addition to those of the parent university).

7. What is your process for notifying donors of changes in leadership or key parties in the programs and initiatives they are giving to?

Faculty and administrative personnel are prone to change. Ensure the institution will provide information regarding new arrivals to the department or program, as they may not share your interests and philosophies.

8. What types and amounts of fees and expenses do you levy on gifts such as endowments?

You have the right to be informed of all indirect costs and how they are assessed. If your gift will cover indirect costs, consider designating a maximum amount. Also, be sure to specifically inquire about expenses, as these are distinct from fees. Donors may be informed that no fees are levied, only to learn that there are multiple expenses that s/he is responsible for.

9. How frequently does your institution provide reports to donors regarding progress toward the stated goals of the program I am considering making a gift to?

If the funds are not spent, the donor can request that they are either returned or are placed into an account that requires donor approval prior to disbursement. Monitoring and evaluation is important, and donors should receive regular updates that certify the warranties in the agreement are valid.

10. What is the institution’s process for accepting gifts through an intermediary funder?

Consider acquiring and specifying a mission-driven donor sponsor or reputable charity with principles that align with your own. This can be a good choice for donors who lack the time or resources to monitor a complex grant agreement or multi-year gift, as the intermediary keeps custody of the funds until the donor’s conditions are met.

1 Florino J. Top ten tips for higher education funders. Philanthropy Roundtable, December 2023. <https://www.philanthropyroundtable.org/wp-content/uploads/2023/12/Top-Ten-Tips-for-Higher-Ed-Funders.pdf>.

2 State of Florida. Senate bill 14 (2022). <https://s3.amazonaws.com/fn-document-service/file-by-sha384/a715df7e6e0cb795582dd75b3b25f99a7586a6af345b77d299b188c48711e6a8c2ca94efeca3a0c6ebbb0edc64cd04e43>.