Are you ready to unlock the generosity of your patient prospects?

For any Healthcare organization, easily engaged as donor prospects—these individuals and families tend to give generously in gratitude for the excellent care they receive.

Most successful hospitals and health systems establish Grateful Patient programs to identify potential donors from among their patients and cultivate them for support. This guide gives you an overview of Grateful Patient programs, why they’re essential, and the steps to setting up a successful one.

What’s a Grateful Patient Program (GPP)?

A grateful patient program is a fundraising strategy that is devoted to identifying which patients will express their gratitude for their healthcare experience through giving.

Why have a Grateful Patient Program? – Gratitude does a body good.

Research on gratitude has found health benefits, including general well-being, better sleep, more generosity, and less depression. Grateful Patient programs are the key to allowing patients and families to have a more fulfilling post-treatment experience and securing critical support for hospitals and health systems. Gratitude Supports Well-Being During COVID-19 (Accordant LLC 2020).

Philanthropy revenue can make or break a hospital.

Health Systems typically have low operating margins (A case study showed a Washington Hospital system operated at 2.6%)\(^1\). This means they need donations to stay in the black.

\(^1\)Making the Case for Investment in Philanthropy to C-Suite Leadership at Health Organizations, CCS Fundraising
GRATEFUL PATIENT PROSPECTING

COMING FOR CARE
Patients are admitted to receive great medical care. Some are new to you, some are already donors.

CONCIERGE CONSIDERATION
VIPS* - Concierge and Fundraisers alerted to current donor admittance, connect with families and patients during their hospital stay.

PATIENT SCREENING
Admitted patient list data (HIPAA-compliant) screened for wealth and charitable giving insights. Patient Prospect engagement begins.

INTEGRATED INSIGHT
Screening results integrated with nonprofit CRM, fueling informed strategy

GRATITUDE GIVING
Continued cultivation and stewardship of patients result in philanthropic support.

*Provide DonorSearch with a list of your top donors and/or key volunteers, and we’ll flag them in your screening results.
Seven Steps to Setting Up a Successful Grateful Patient Program

These seven steps will guide you through what you need to acquire before and during the set-up of a grateful patient program. Of course, each healthcare organization should build a program in line with its specific needs.

1. Get your C-Suite to champion the GPP
2. Identify doctors and nurses who’ll be GPP ambassadors
3. Train your doctors and nurses in philanthropy and the GPP process
4. Determine the fundraising and research staff and resource budget you need
5. Establish guidelines to protect patient information privacy
6. Gather the data you need to identify the prospects with the greatest potential
7. Select a system or platform to combine and analyze your data in one place

SUCCESS REQUIRES ORGANIZATION-WIDE COMMITMENT

For your patient fundraising to be successful, you need to adopt a culture of philanthropy that engages leadership and clinicians, in addition to fundraisers. It will also require a commitment of dedicated staff and budget.

1. Get the support of leadership
   To have a reliable program, you need the help of the C-Suite of your organization (that’s your CEO, CNO, CMO, etc.). By being your champion, they can pave the way to success by:
   You are communicating the benefits of a grateful patient program with your healthcare practitioners. The outcomes could be funding labs, buying equipment, and supporting new programs.
Identify the doctors, nurses, and other healthcare givers that can point to the grateful patients—and have a greater likelihood of giving.

2. **Identify the doctors and nurses who should be part of the program.**

Select a group of doctors and nurses who support the program to serve as ambassadors. You want these ambassadors to spot the prospects and refer them to your fundraiser. It would be great if they were part of the cultivation strategy with time.

The medical staff is bound to have concerns with fundraisers making visits to the patients they are trying to treat. Address their concerns early and often.

3. **Do your doctors and nurses understand fundraising? Train them.**

Show them how the program works and how good relationships lead to more gratitude, leading to charitable gifts. Give them a specific process to follow.

4. **Figure out the staff and budget you need.**

A GPP program needs dedicated fundraisers and research services team, along with the funds to screen your patient lists for prospects with capacity and affinity—daily.

**DATA-DRIVEN PROSPECTING LEADS TO INFORMED ACTION**

To find the patient prospects with the most significant gratitude-giving potential, you will need to analyze a vast amount of patient experience, wealth, and philanthropic data.

A practical matter: You’ll need a process that helps your team sift through each day’s screening results without getting overwhelmed. Think about your workflow and identify sorting and filtering flags to help you prioritize.

5. **Establish guidelines to protect patient privacy**

Work with your leadership and legal counsel to ensure that the data you work with to identify and qualify prospects is handled within hospital policy and federal (HIPAA), state, and local patient privacy laws.
6. **Gather the data you need to identify the patient prospects with the most potential**

Finding grateful patient prospects involves gathering and analyzing data from 3 sources:

**DATA SOURCE 1 - WEALTH & PHILANTHROPY SCREENING**

Screen the list of patients that come through your doors daily. You can accomplish the screening by giving a patient list to a vendor who’ll return wealth and philanthropic indicators.

**WAIT. Why Daily?**

The ‘window of generosity’ peaks within one month of discharge and closes steadily after that. With the 30-day countdown, you need to find and connect with the patient prospects who have high potential.

Give good data to get good data.

To get quality results from a screening, you’ll need to give your vendor patient names and home addresses. Business addresses, phone numbers, and email addresses (if you have them) are also useful for prospect research. You might also include flags for ‘VIP’ patients, such as board members or donors.

**DATA SOURCE 2 - PATIENT EXPERIENCE DATA**

Patient experience data—like visit dates, physician names, etc. – should be pulled from your Electronic Medical Record System (EMRS) and included in data you look at to measure the patient’s connection and gratitude potential.

Don’t worry; you only need to use what it’s legal for you to access. In case you don’t have the list memorized, here’s what fundraisers can access:

- Patient demographic data (name, address, phone/email, date of birth, gender, etc.)
- Health insurance status
Dates of patient services
Hospital department where the patient received care
Treating physician information
Outcome information

HOLD ON. There’s a LOT of experience data to go through every day. Yes, it is a LOT. Suppose you work with a screening vendor with an artificial intelligence feature like DonorSearch Aristotle. In that case, you can (of course SECURELY) include EMRS data in your daily file and receive highly predictive gratitude scores.

Swiftly Predict Patient Gratitude with Precision

The amount of a patient’s gratitude giving is directly related to their healthcare experience. With the introduction of artificial intelligence to screening technology, it’s now possible to quickly crunch vast amounts of experience data (visits, doctors, etc.) alongside their wealth and giving interest information and accurately predict a patient’s level of gratitude.

DATA SOURCE 3 - GIVING AND INVOLVEMENT DATA

Your best prospects are your current donors and volunteers. Look at philanthropic histories, volunteer status, event participation, and the like in your fundraising CRM.

If you include giving information in your screening file, you can get an affinity score called RFM—it’s a way of measuring interest in giving.

7. Decide on a system or platform that you can use to work with prospect data.

Your team needs a way to collect and maintain prospect data in one method or database so that you can quickly analyze the information and prioritize action. GPPs typically combine data from three sources: 1) the EMRS; 2) Your fundraising CRM; 3) prospect screening results.
PIVOTING WITH THE COVID-19 PANDEMIC

The COVID-19 pandemic has--of course--had a huge impact on healthcare fundraising.

Your patient donors want to see you get past this and keep doing good work.

Patient donors want to know how you’re organization is doing, how you’re caring for your patients, employees, and the community you share--and they want to honor their caregiver heroes.

3 Ways to Meet the Challenges of the Crisis

Right now, you have the opportunity to strengthen and cement your relationships with your constituents.

1. Stay connected: Keep communicating:
   - show empathy for what they’re going through, talk about the care they’re getting, and give them an opportunity to help their healthcare heroes keep on caring.

2. Set up special fundraising campaigns:
   - A COVID-19 fund to provide caregivers childcare, patient families’ lodging, PPE
   - Research for treatment of COVID-19

3. Support for telemedicine services
   - Reach out to businesses that are weathering the storm (food delivery, virtual meeting technology companies) and give them an opportunity to make in-kind donations.
CONCLUSION

Even after we get past the current health crisis, you’ll still need to:

- Bring the best health care to your community.
- Have a place where sick kids get well go on to live a long and happy life
- Build the lab where you discover life-saving cures
- Give your patients and their families the chance to show their gratitude.

A grateful patient program will help your entire organization do all of that for the long haul.