GRATEFUL PATIENT

DATA MANAGEMENT
IN 3 FRUSTRATION-FREE STEPS
IT CAN’T BE THAT EASY, RIGHT?

THREE STEPS

1. Match Your Records
2. Create a Workflow
3. Capture Gifts

Managing data through grateful patient programs may not always be easy, but it can be much easier than you think.

More information
Visit OmaticSoftware.com or email us at info@omaticsoftware.com.

If you’re like many healthcare organizations, you’ve invested a significant amount of time and effort to get to where you are today with your grateful patient program – whether it’s been mostly planning, implementation, or both. Don’t let those efforts go to waste because you’re not making meaningful connections with potential supporters. Timing is critical for grateful patient fundraising. Therefore, efficient data management is critical as well. Let’s take a look at the approach and tools needed to get the job done using Raiser’s Edge™.

When it comes to grateful patient programs, nothing slows down the best of intentions like data headaches. While it’s always important for fundraisers to have an automated workflow in place, it’s particularly important when it comes to grateful patient programs because time is of the essence. Here’s why: the best response rates from grateful patient solicitations occur within 30 days.
After 90 days, response rates plummet. For this reason, you need to map out your process to get it as close to auto-pilot as possible. Creating a visual flowchart that is unique to our organization’s process is a great way to build out your process and share it with other staff members. More on that later!

Like most development approaches, grateful patient programs generally draw a clear distinction between major giving prospecting and annual giving-focused efforts. Often when it comes to grateful patient outreach in a hospital setting, there are two distinct discussions:

1. VIP or concierge programs that can include face-to-face interaction or comfort outreach while people are still under a facility’s care
2. Post-treatment follow-up in the form of appeals that fall within annual giving type programs

Omatic is here to help with both processes so you can stay focused on creating connections.

For VIP or concierge programs, the need for timeliness is pretty obvious, right? If face-to-face interaction is part of your program, the start of personal connections most often occurs when patients are still within the facility’s care. But even for direct mail appeals to past patients, studies point to a drop in response rates for grateful patient mailings when the timing of the mailing was significantly delayed. It is therefore imperative for both tracks to have efficient data processes in place that allow for timely cultivation.

We have worked with hundreds of healthcare organizations, so we’re sharing what we have learned about managing data through grateful patient programs to achieve the best results. Assuming you have set goals and have defined your success metrics appropriately, we have identified three key considerations you should implement for optimizing your program. These three steps – developed directly from organizations struggling with their grateful patient data management and proven effective by successful programs – will help you foster stronger relationships with grateful patients and grow your program. Let’s get started!
One of the biggest data challenges healthcare organizations face within a grateful patient program is matching patient lists with their current donors so they can be aware of prospects and donors that are in their care. Importing lists into Raiser’s Edge™ can be daunting, but with the right process and tools in place, matching supporters can become routine and reliable. New donor acquisition lists from patient admissions or records that have gone through a wealth screening process should be matched with their current donors, so organizations can be sure they are taking the right approach with supporters - a necessity for both grateful patient mailing and VIP/concierge efforts.

If you have-or plan to-implement early cultivation programs that focus on patients in care with the potential to make major gifts, it’s important for everyone to understand that all patients get great medical care. The purpose of the program is to foster relationships that build support for the organization. Gifts will help enhance the level of healthcare available to the overall community.
Wealth screenings can help to determine who may have the capacity to become a generous supporter in the future. Be sure to take into account that you must provide the recipient of any fundraising communication with a clear opportunity to opt out of receiving any further forms of contact. The individual’s choice to opt out should be treated as a revocation of authorization under the privacy rule.

In addition to helping you maintain meaningful relationships with current supporters, connecting lists to current donors is vital to ensure that you DO NOT:

• solicit current donors with the wrong approach.
• contact “do not call” records who asked not to be reached.
• violate a patient’s right by not clearly communicating an opt out feature on fundraising communications

HOW TO ACCOMPLISH STEP 1:

With Omatic’s Grateful Patient Solution, you can:

• Import large volumes of records while matching patients to existing constituents without “muddying” Raiser’s Edge with non-donors.
• Easily and quickly distinguish VIPs vs. everyone else and create appropriate workflows along with action tracks and solicitor assignments.
• Exclude based on any HIPAA-compliant criteria you determine - like area of treatment, insurance status, or outcome.
• Test different messages/methods and track appeals.
• Fully streamline the data entry process for new donors acquired. Finder numbers are assigned to all appeals, entered into the gift barcode, and automatically promote the donor from a non-constituent to a full constituent, retaining all of the history from their non-constituent record!
STEP TWO
CREATE A WORKFLOW

BUILD A VISUAL FLOWCHART THAT IS UNIQUE TO YOUR DATA PROCESS

As data flows into healthcare organizations from multiple sources, your program needs a plan in place to navigate key decision points and determine how you communicate with grateful patients and families.

Once wealth capacity or other segmentation variables are determined, key decisions should be made regarding the cultivation path of prospects.

The time it takes to process patient data and go back and forth between systems is NOT time well spent. There are tools available for importing data, managing lists, and segmenting appeals. Implementing the right approach will enable you to get appeals out much quicker and easily manage responses. You can analyze what appeals and packages have performed well and if a message/method didn’t work, you can test others and adjust quickly.

While developing your patient fundraising process, you need a plan for working within Raiser’s Edge™ and how you will manage patient information. Some important things to consider include:
• What is the volume of patient data you expect to manage through your program?
• What is the ideal frequency for matching your supporters? Do you have the ability to take on daily patient record matching and screenings? If not, set incremental goals to get there!
• What type of data files will you be receiving from your patient management system? Make sure that your IT staff and DBA are involved.

Your team members should know what role they play in managing, leveraging, and recording data. A database administrator may primarily manage incoming data by being responsible for getting patient lists and/or wealth screening results into Raiser’s Edge and then to the development staff. The development staff may take it from there to determine who may need a patient visit as part of a concierge program and also make sure that the remaining names are segmented appropriately for timely appeals. Gift officers should be tasked with entering key information directly in the system or through a recommended process (like a spreadsheet) for importing. As they say: “If it’s not in Raiser’s Edge, it didn’t happen!” You’ll want to have clear parameters to make sure you capture enough data to use at key decision points throughout the journey of a supporter—but not overdo it to the extent that the amount of data you have is overkill and meaningless.

**HOW TO ACCOMPLISH STEP 2:**
In the example on the following page, data flows into Raiser’s Edge™ from various sources (including filtered patient files from IT). Each organization’s process can vary, but wealth screening often occurs here while names are also matched with existing constituents in RE or brought in as new prospects that will not have a full constituent record. This overall process is made possible in RE through the list management area of Omatic’s Grateful Patient Solution. Next, a variety of segmentation steps can occur to determine a course of action for each patient/family. This determines major, planned, or annual giving approaches for prospects. Creating a visual roadmap of this process is a great way to ensure that data flows are optimized.
STEP THREE
CAPTURE GIFTS

RECORD GIFTS IN RAISER’S EDGE™
SO YOU CAN THANK DONORS EARLY AND OFTEN

Gifts from individuals have generally accounted for around 85% of the more than $10B that the Association of Healthcare Philanthropy (AHP) reported was contributed to healthcare organizations in the US and Canada in 2013. By the way, that $10B+ represents an increase in giving to healthcare organizations of more than 22% over the past 4 years. Part of that can be attributed to the rise in grateful patient programs, but it also points to even more opportunity for healthcare organizations to grow their grateful programs since patient giving represents only 25% of the total, but is growing.

When gifts arrive, you want to be ready. It’s critical for timely stewardship efforts.

Response rates to grateful patient mailings increase by 50% when received 30-60 days after discharge vs. 120+ days. Additionally for VIP/concierge programs, two-thirds of individuals receiving complimentary services ultimately join giving societies at some point.

A plan or system needs to be in place in advance to handle gift data and, in particular, handle the many different types of gifts that come your way including tributes, pledges, recurring gifts and more.
With the right data processes in place, you can achieve significant new efficiencies which will lead to more timely cultivation and stewardship!

**HOW TO ACCOMPLISH STEP 3:**
As gifts, pledges, split gifts, and even tributes with multiple acknowledgees arrive, they can quickly and easily be imported into Raiser’s Edge with Omatic’s Grateful Patient Solution. When gifts are added, you also keep the history of your interactions with supporters - from even before they were promoted to full constituents!
Both engaging with and thanking supporters early and often are proven approaches for successful grateful patient programs.

Many healthcare organizations have implemented a strategic plan with very specific steps for major and planned gift cultivation that includes visits following a screening process. These concierge or VIP programs call for proficient data management throughout their process due to the time sensitivities. Timing is also important for direct mail because, as previously noted, well-timed appeals return the best response rates. It is therefore imperative to have a dynamic process in place that enables accurate data management and prompt cultivation efforts.

Better data management has led to more donations from fewer solicitations and higher average gifts for organizations implementing these key steps. While it may seem counterintuitive to raise more through fewer appeals, it is not only attainable... it is being proven now through healthcare organizations following these steps to automate data processes within their grateful patient programs. These organizations are combining important investments in data management with their strategic fundraising plans to facilitate grateful patient programs that include approaches like concierge programs and caregiver recognition programs.
The bottom line when it comes to grateful patient data management is that you should:

- Match known constituents as quickly as possible. You may also wish to incorporate notifications for VIPs, board members, and other known supporters.
- Identify the most important data you need to retain for your fundraising and prospect research needs and map out a process for managing it throughout your program.
- Capture gifts early and plan ahead so that acknowledgements and stewardship are as much a part of your focus as cultivation.

It is important to plan for software and IT resources that minimize the work needed to integrate and utilize data. Omatic Software addresses many data challenges and has worked with a number of healthcare organizations to ensure that data flows through their programs so they can concentrate on making meaningful connections with grateful patients and families. Import profiles can be customized for nearly any purpose and you can integrate all aspects of your program within Raiser’s Edge™ including your list management.

Successful grateful patient programs come in different shapes and sizes, but many best practices for data management can be shared across organizations. For those healthcare organizations using Raiser’s Edge in their process, we welcome you to learn more about how peer organizations are working with Omatic Software to automate their processes including managing their health/wealth data, data cleansing, segmentation, engagement, gift acknowledgements, and reporting. Spending less time managing data means spending more time making meaningful connections with grateful patients.
NOW THEN, LET’S GET YOUR DEMO ON...

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