

 WINDFALL

 Providence

Deploying Precision Prospecting Across a
Diverse Healthcare System:
A Conversation with Providence Health

Introducing Today's Speakers



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Windfall



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Providence

Today's Agenda

1. Windfall Overview
2. Providence Health Introduction
3. The Challenge: Deploying Prospecting at Scale
4. Propensity Modeling Across a Diverse Constituent Base
5. Results and Takeaways
6. Q&A

Windfall Overview

Our vision is to **change**
the way that organizations
understand and engage
donors.

A Platform Built for Data-Driven Development

WEALTH SCREENING



Integrating into CRMs or batch processing CSVs, Windfall matches and enriches constituent data.


Enhanced with
Career Intelligence

PROPENSITY MODELING



Leveraging our existing infrastructure, we can assist in developing scores based on 1st party and Windfall's data.

DATA LINK



For those with multiple databases, Windfall provides sophisticated linkages to help dedupe.

Pricing is **not** based on the number of records or credits, we provide *unlimited* syncs for all products

Introducing Career Intelligence

Windfall matches employment and employer data to all individuals in your system of record so you can improve your constituent prioritization and highlight trigger events for engagement.



CAREER DATA FIELDS INCLUDED

- LinkedIn URL
- Job Title
- Job Level
- Job Function
- Job Start Date
- Recently Changed Jobs
- Recently Promoted
- Recently Retired
- Recently Changed Companies
- Company Name
- Company Category
- Career Match Confidence
- Career Data Last Updated Date
- Company Domain
- Company Phone Number
- Company Address Line 1
- Company Address Line 2
- Company City
- Company State
- Company Zip
- Company NAICS Code
- Company Size Range
- Company Revenue Range

Windfall Works with 800+ Organizations

WINDFALL IS LEVERAGED BY LEADING HEALTHCARE INSTITUTIONS WITH LOCAL / NATIONAL PRESENCE



Dedicated Customer Success & Best Practice Guides

Once you are a customer with Windfall, you will be assigned a dedicated Customer Success Manager. They will be responsible for: onboarding, providing guidance on data, support requests, and collecting your feedback.

WHAT YOU RECEIVE FROM CUSTOMER SUCCESS:



No automated bots: Speak with a human based in the United States.



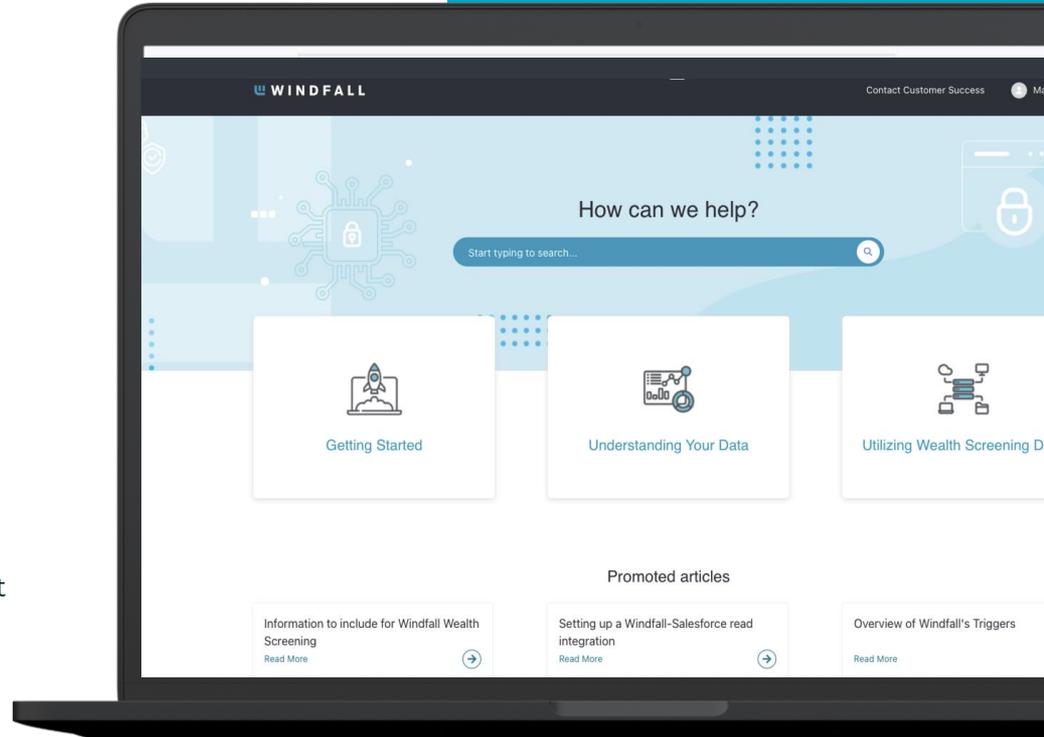
24-hour response time: Get a response to your question via email or phone.



Best practice guides: Get access to Windfall's best practice guides sourced from 800+ customers.



White glove service: We'll make sure we don't create more work for you.



Discussion: Providence Health's Journey to Precision Prospecting at Scale

Providence Health Introduction

Providence's vision, **Health for a Better World**, is driven by a belief that health is a human right. Every person deserves the chance to live their healthiest life.

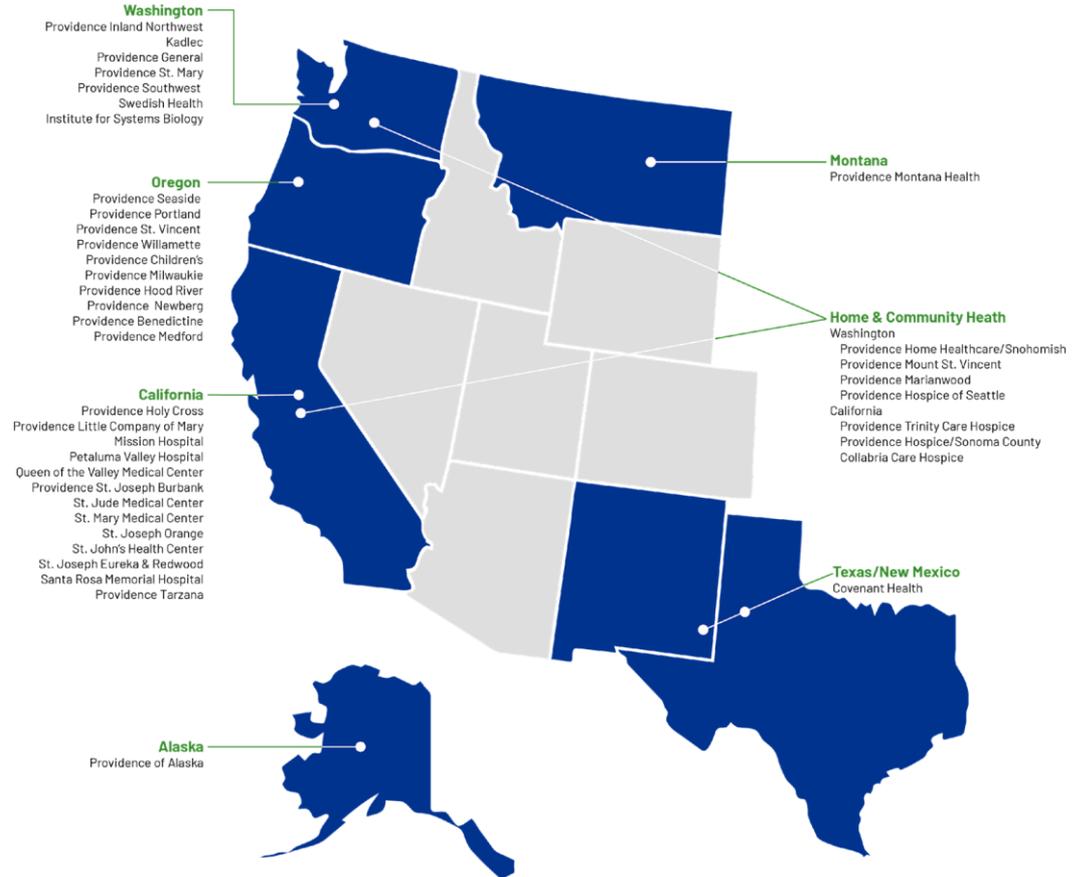


The Providence family of organizations employs 120,000 caregivers, including 34,000 physicians and 56,000 nurses. With 52 hospitals, 1,000 clinics, 17 supportive housing locations, senior services and many other health and educational services, Providence serves communities across seven U.S. states—Alaska, California, Montana, New Mexico, Oregon, Texas and Washington.

\$359M Raised in 2022

Building upon the foundation of charity-funded care led by our founding Sisters, Providence today has become a national leader in health care philanthropy.

Our family of **40+ foundations** across Alaska, California, Montana, New Mexico, Oregon, Texas and Washington inspired **50,000+ donors** in 2022 and raised more than **\$359 million** in critical funding, helping advance care in the communities we serve.



About Providence

- Single Blackbaud CRM
- Single Epic EMR
- Snowflake data warehouse
- 40+ foundations
- 350+ caregivers
- Hybrid org structure
- Microsoft Azure/Office365
- Microsoft Power BI

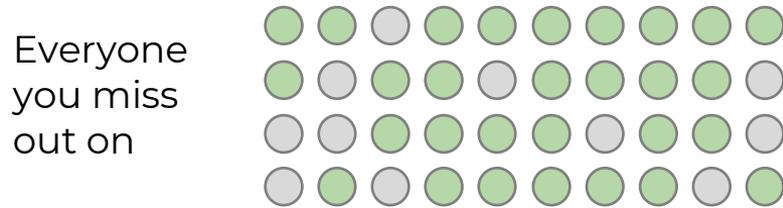
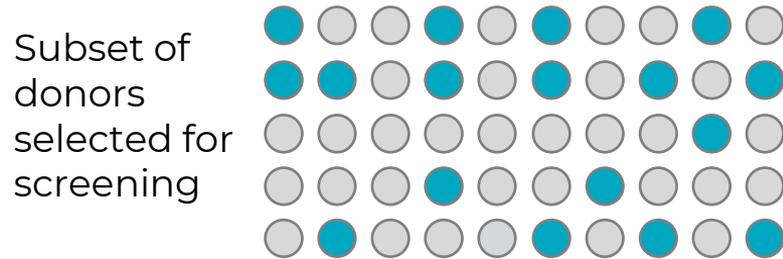


Setting the Stage

The Challenge: Wealth Screening at Scale

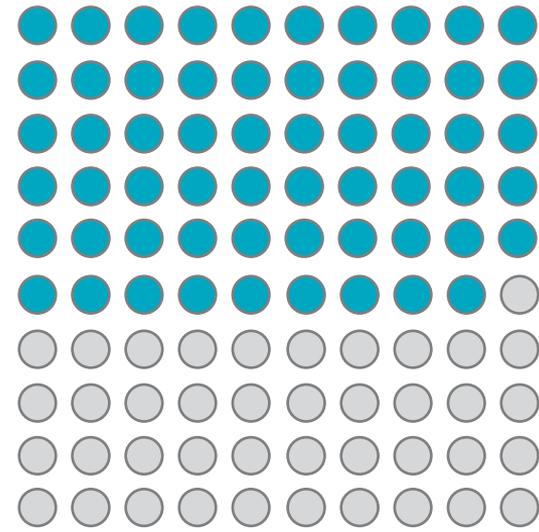
Picking Who to Screen is Inefficient & Ineffective

Traditional Wealth Screening Model



- = affluent constituent
- = affluent hidden gem

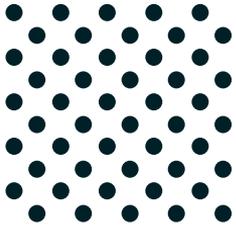
Windfall's Unlimited Model



Don't pick and choose but find all hidden gems.

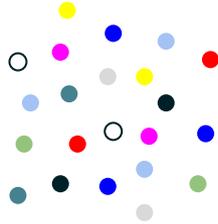
Breaking Down the Data -- Not That Easy...

HISTORICALLY, WHILE THERE HAS BEEN A PLETHORA OF DATA -- PROCESSING IT IS EXTREMELY CHALLENGING:



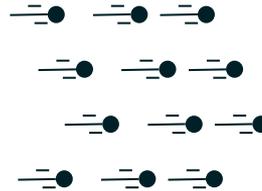
VOLUME

Scale of data: there is a ton of historical data



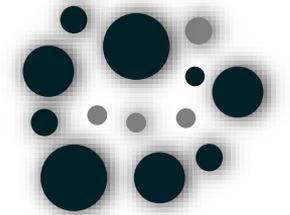
VARIETY

Different forms of data: structured vs. unstructured



VELOCITY

Speed of data: how quick you can take action



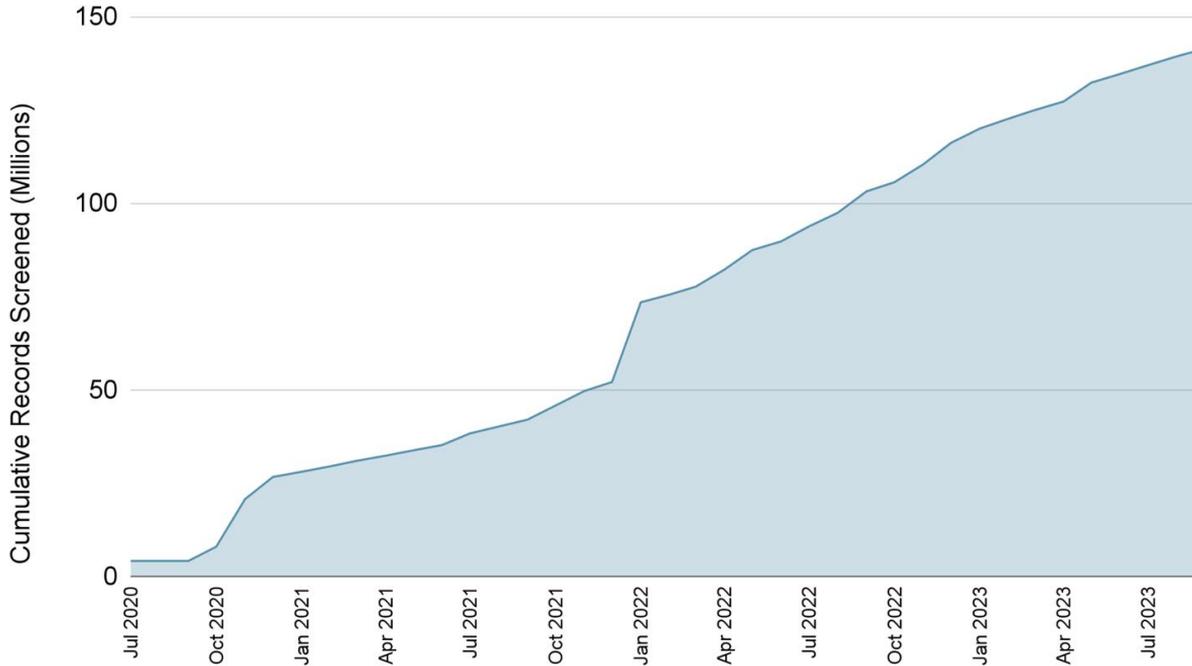
VERACITY

Uncertainty of data: is this clean data? accurate?

People are fluid, people move, change jobs, make money, lose money, – it's about the recent data *that is accurate*.

Providence # of Records Screened Over Time

WINDFALL REGULARLY SCREENS AND RESCREENES THE POPULATION AS PART OF ITS BUSINESS MODEL:



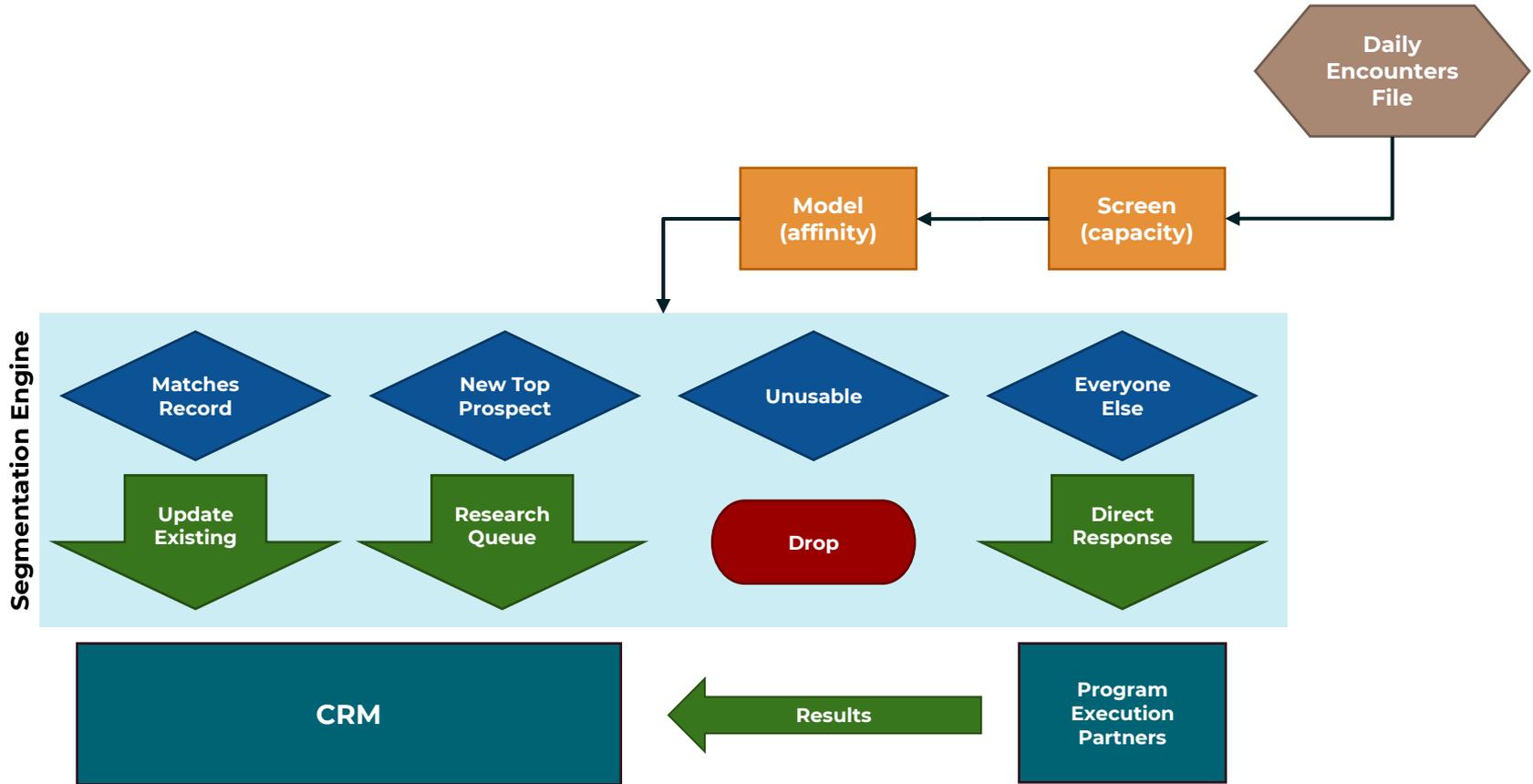
BY THE NUMBERS:

- **141 million** records processed
- **105,000** daily records
- **3.2 million** monthly records
- **9.6 million** quarterly records

BONUS:

All of this is automated and processed through workflows

Providence's Patient Data Workflow



Propensity Modeling Across a Diverse Constituent Base

Wealth Is the First Qualification, But It Isn't the Only Factor

MACHINE LEARNING CAN PROVIDE SOPHISTICATED PRIORITIZATION FOR DEVELOPMENT TEAMS

- Leveraging artificial intelligence for prospect research can radically streamline operations
- If you build a model meant for your organization and your target goal (\$25K, \$10K, planned giving, etc) it **will** help you reach your goals more quickly
- Marrying wealth screening and propensity-to-give (PTG) models can help prioritize prospects for gift officers



Net Worth	\$12.1MM	\$5.3MM
Recent Engagement	Yes	Yes
Boat Owner	No	Yes
Philanthropic	Yes	Yes
Multi-property Owner	Yes	No
Qualified	✓	✓
PTG Score	23	88

Use Cases for Propensity to Give Models



Annual Fund: Participation

Increase the % participation of the overall constituent base



Annual Fund: Leadership Gifts

Every year, you may need to generate donations above \$X



Major Gifts

Establishing gifts that are larger and may take longer and may be a pledge



Grateful Patients

For academic medical centers, a common way to mine individuals



Planned Giving

For estate planning, similar to major gifts but with different assets



Outreach and Many Others!

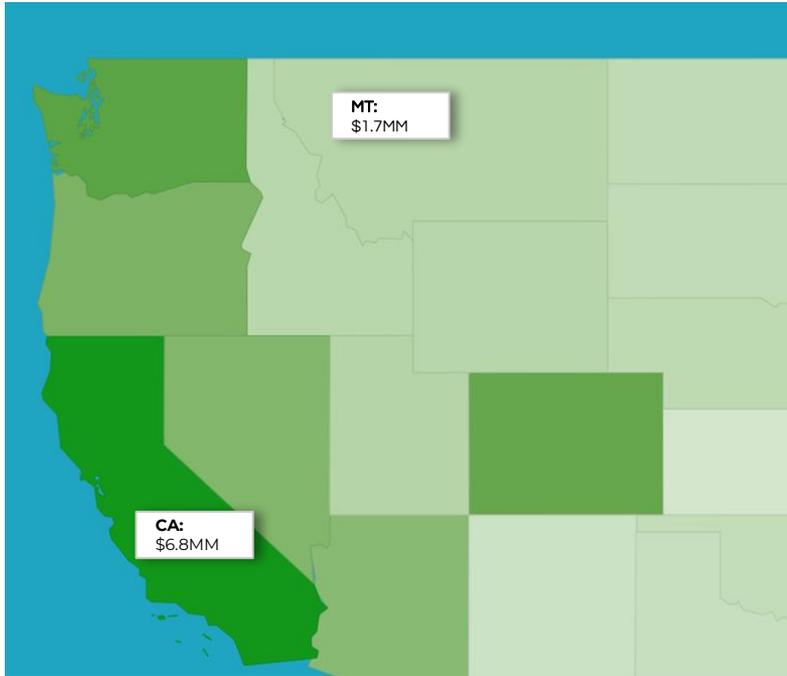
Could be leveraged many more ways like meetings, direct mail, etc.

Providence Health's Custom Machine Learning Propensity Models

		Objective / Ideal	Dataset Scored	Screening Cadence
	Grateful Patient Model (Low, Med, High amounts)	Low, Med, or High amount / year	Patients	Daily
	Planned Giving Model	Find donors who will make <u>any planned gift</u>	Donors	Monthly
	Major Gifts 'Clusters' Models	One-time gift at specific, site-dependent levels	Donors	Monthly

But Wait? 40 Foundations? 1 Model...How Do you Do That?

Relative Wealth for the Top 1% by Net Worth



Source: Windfall 2023.

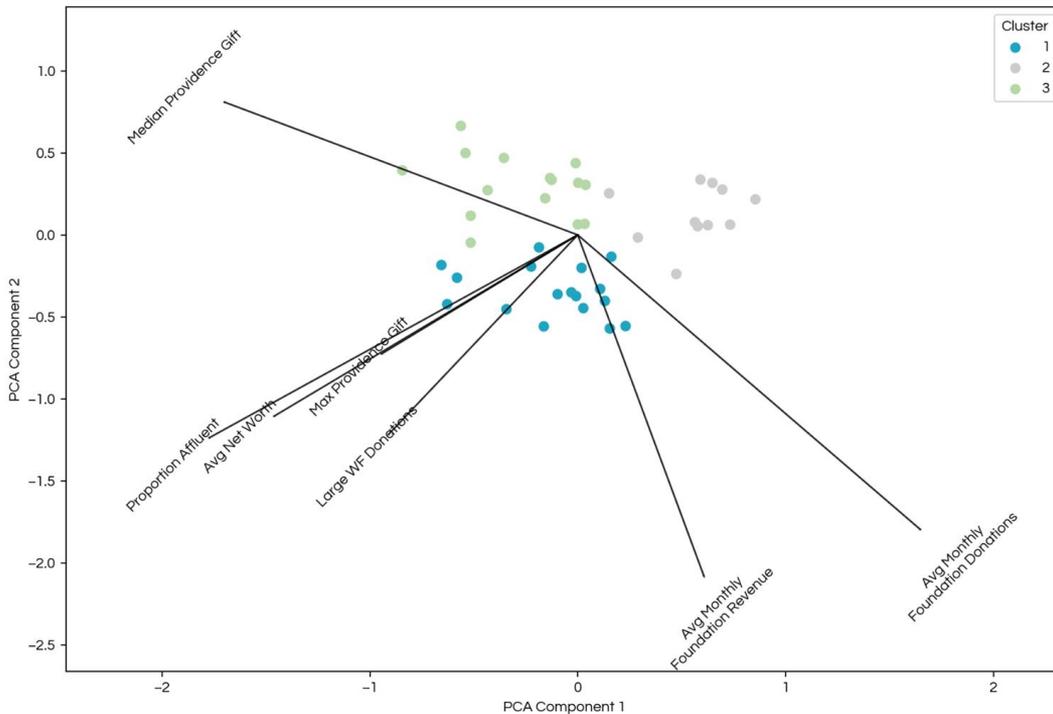
THIS IS A REALLY HARD PROBLEM – ONE MODEL TO RULE THEM ALL? DOESN'T ALWAYS WORK

- Providence refresher by the numbers:
 - 7 states
 - 40 foundations
- Even across the same state, their service areas cover urban, suburban, and rural areas
- Prior to recent years, **many foundations operated independently**, and major gift thresholds were not standardized
 - ***Now, this is really hard.***

PCA on Clustered Foundation Sites

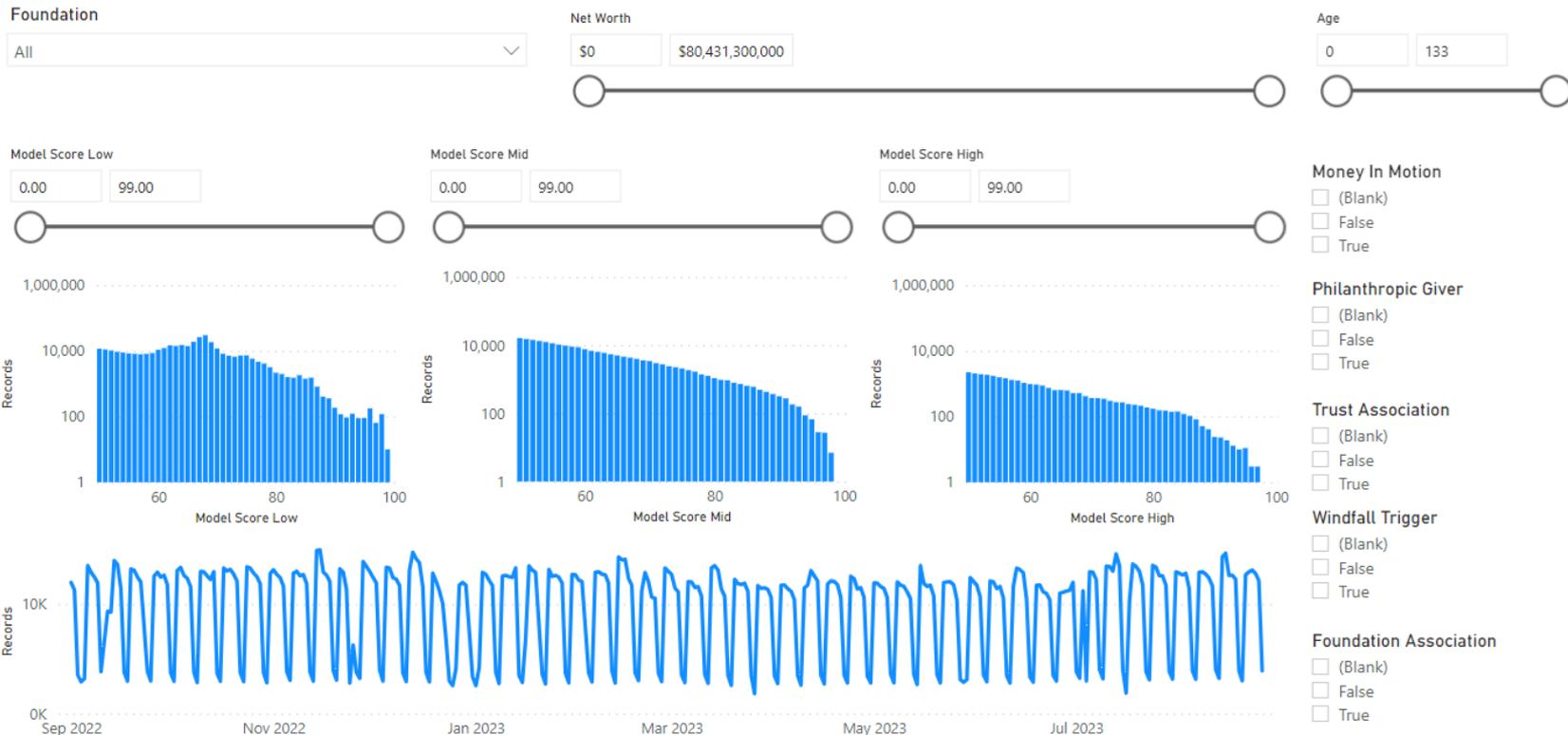
WE NEEDED TO REALLY UNDERSTAND THE DATA TO COME UP WITH A COLLABORATIVE SOLUTION

- Leverage a [principal component analysis \(PCA\)](#) to help where
- But first:
 - Windfall's team worked with Providence to determine clusters of similar foundations based on gift size and constituents
 - Find common features (attributes) that would differentiate groups
 - Confirm our insights with Providence before proceeding



Results & Takeaways

Prospecting Data at Scale



1.48M

Annually

123.33K

Monthly

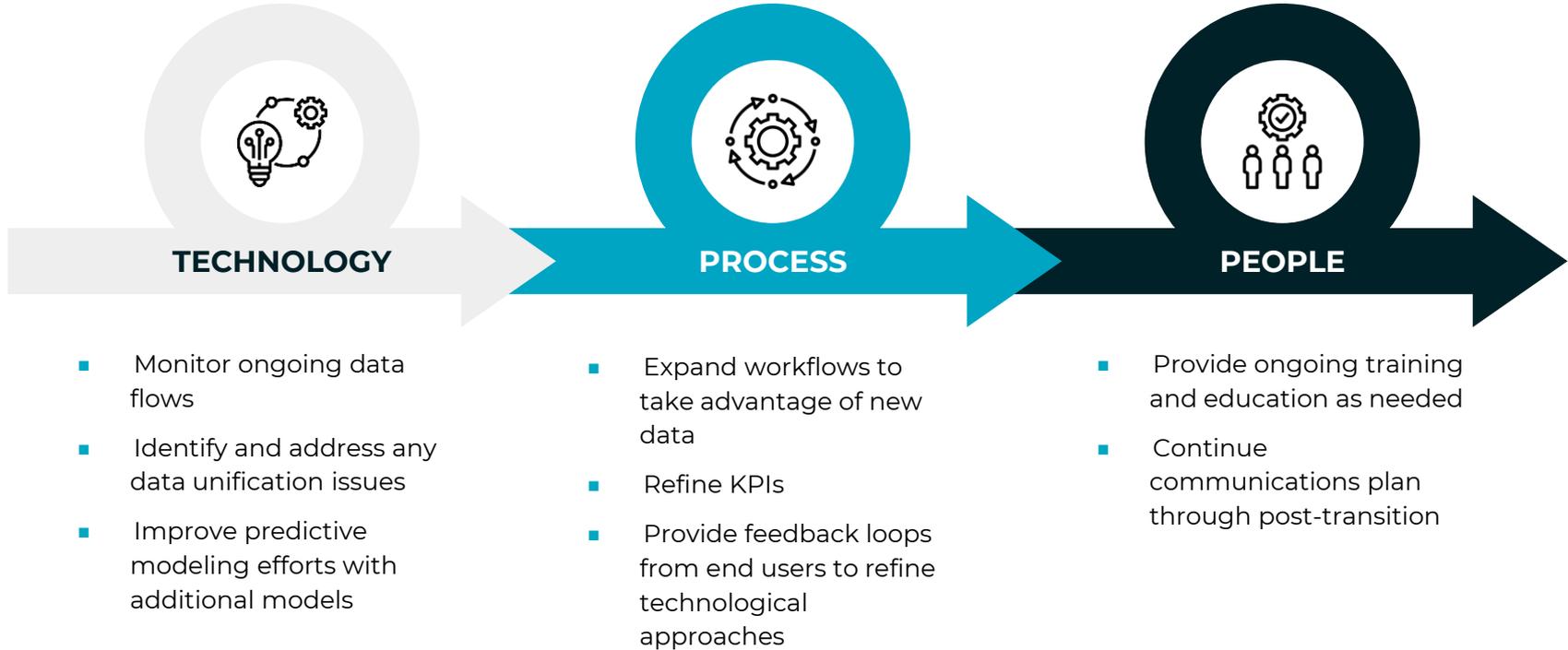
28.46K

Weekly

4.20K

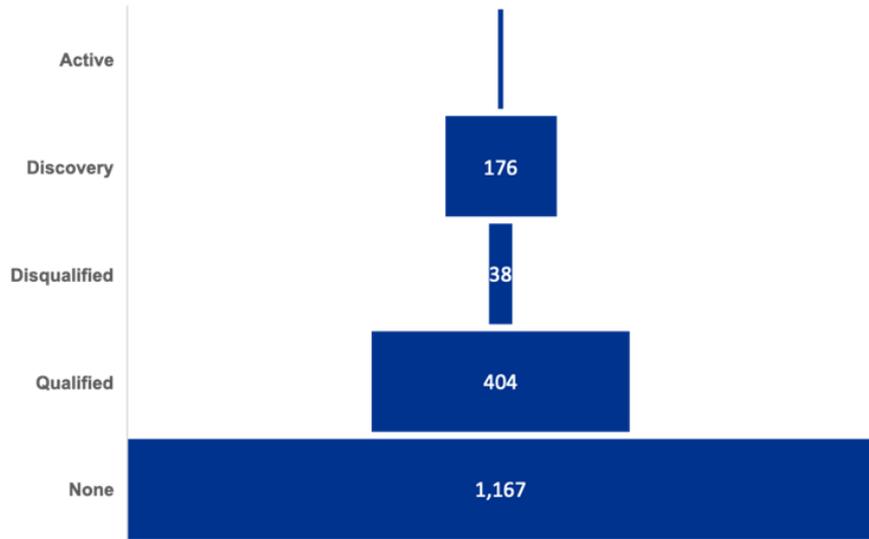
Daily

Data-Driven Approaches Require Ongoing Efforts

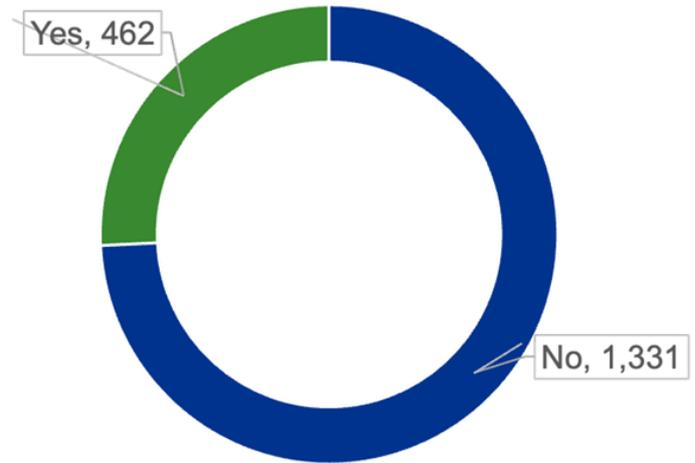


Qualification and Moves Management

Prospects by Status



Prospects with Completed Interactions



Q&A

Thank You!

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