# Building an Intentional Prospect Research Program for Operational Efficiency

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# Hello!

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Conduit

Philanthropic Intelligence Partner

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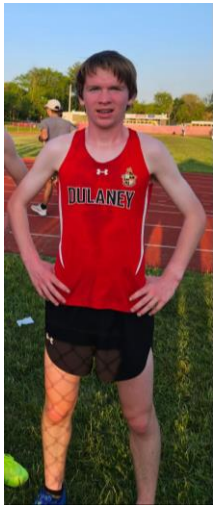

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# Getting to Know You

please go to

**Menti.com**

and enter code

XXXXXXX

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# Know / Feel / Do

The Problem

KNOW the process we went through to identify, develop and implement our Prospect Research program

Solution/Approach

FEEL inspired to build out or create your own prospect research program

Key Takeaways

DO the work at your own organization based on what we learned and are sharing today

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# 1. Background on

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# Vision

**The trusted choice for personalized health care and wellness.**

# Mission

**Virtua helps you**
**be well, get well, and stay well.**

## Hospitals

1492 beds

**Virtua Voorhees**
*402 beds*

**Virtua Mount Holly**
*383 beds*

**Virtua Our Lady of Lourdes**
*340 beds*

**Virtua Marlton**
*198 beds*

**Virtua Willingboro**
*169 beds*

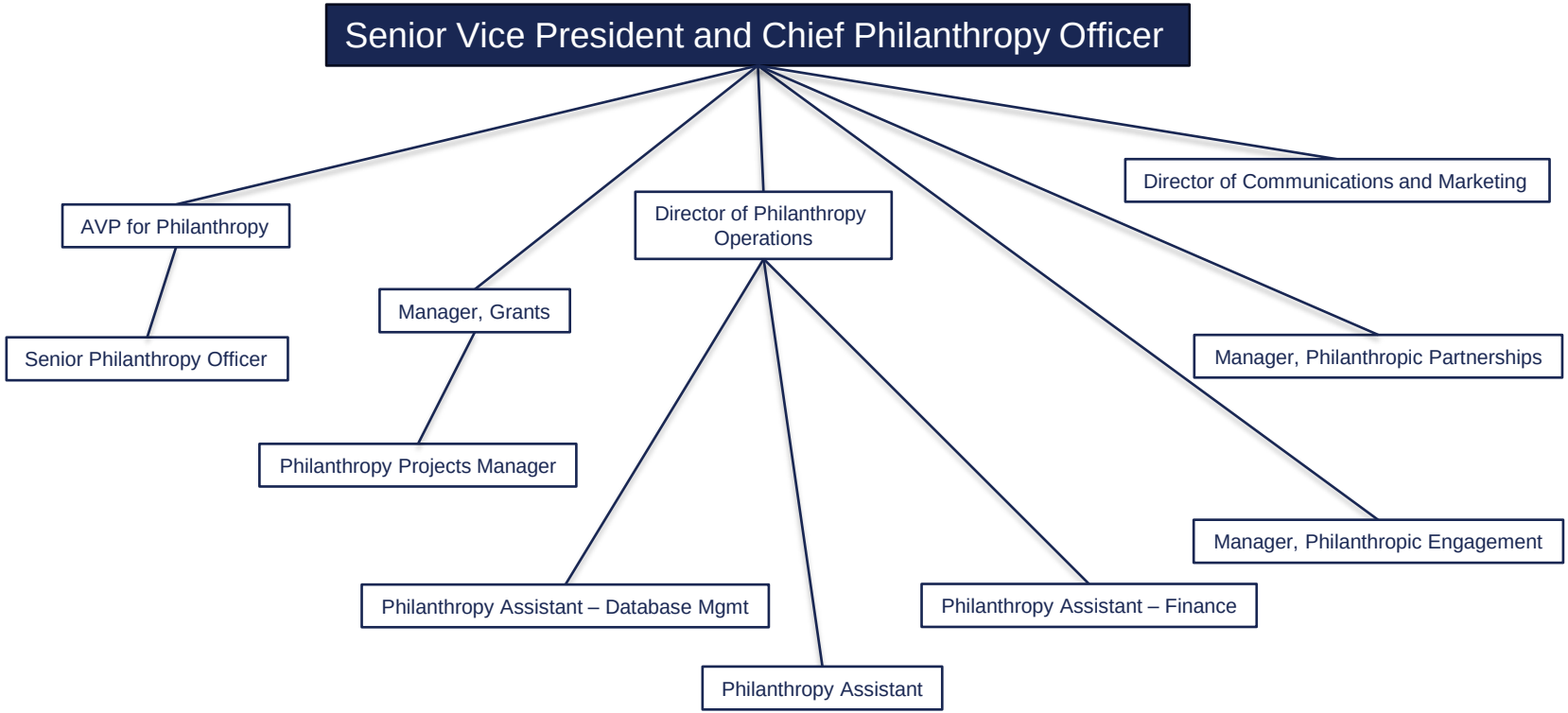
**7 Emergency Rooms represent 296,100+ visits.**

## Satellite Emergency Departments

**Berlin**
9,800+ annual visits

**Camden**
33,600+ annual visits

# Office of Philanthropy



# Setting the Stage..

- Dedicated Prospect Researcher
- Wealth Screening
- Moves Meeting format

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# Bringing in an Outside Voice

**Visioning Session**

- Open group brainstorming conversation

**Research Audit**

- One-on-one meetings with staff

# Identified

**Select Clinician Engagement**

- Track clinician referral
- Basic understanding of patient experience

**Prospect Research Needs**

- Integrate data
- Lean and efficient data

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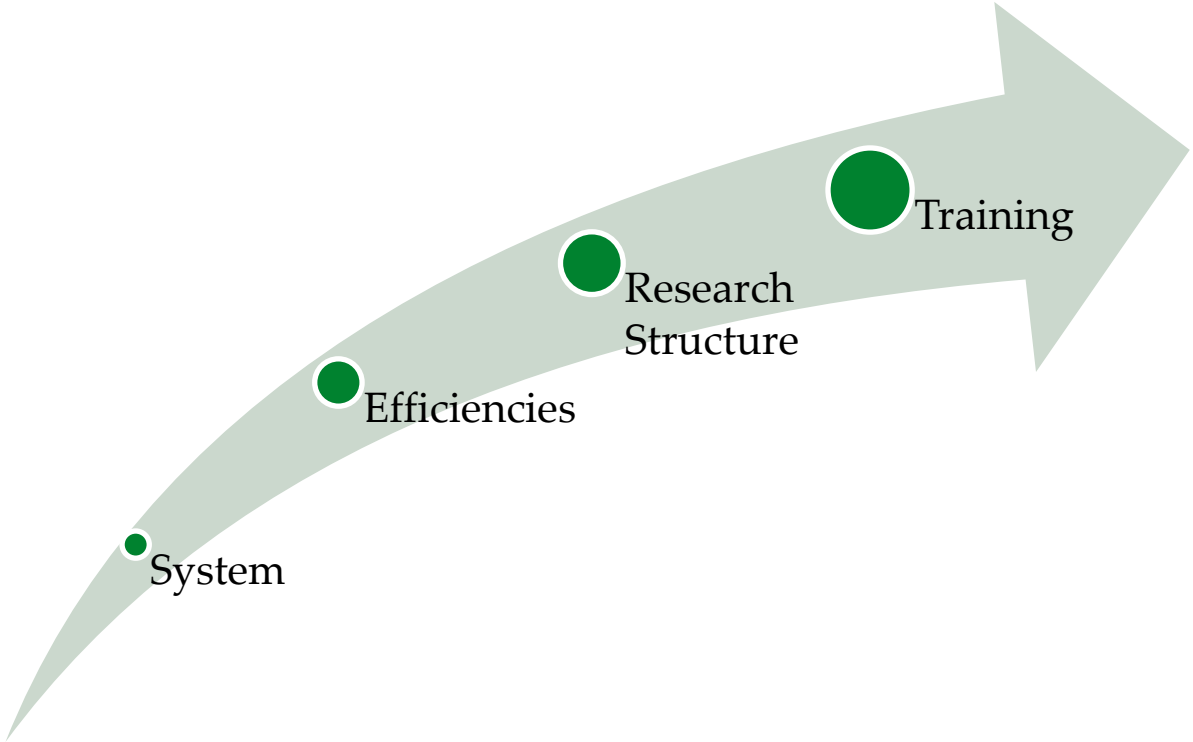
# Roadmap to build the program



# Implementation

## Processes

- Research Levels
- Stages/Ages within Portfolio
- Policies/Procedures

## Tools

- Wealth Screening
- EPIC referral

## People

- Staff Training
- Moves Meetings

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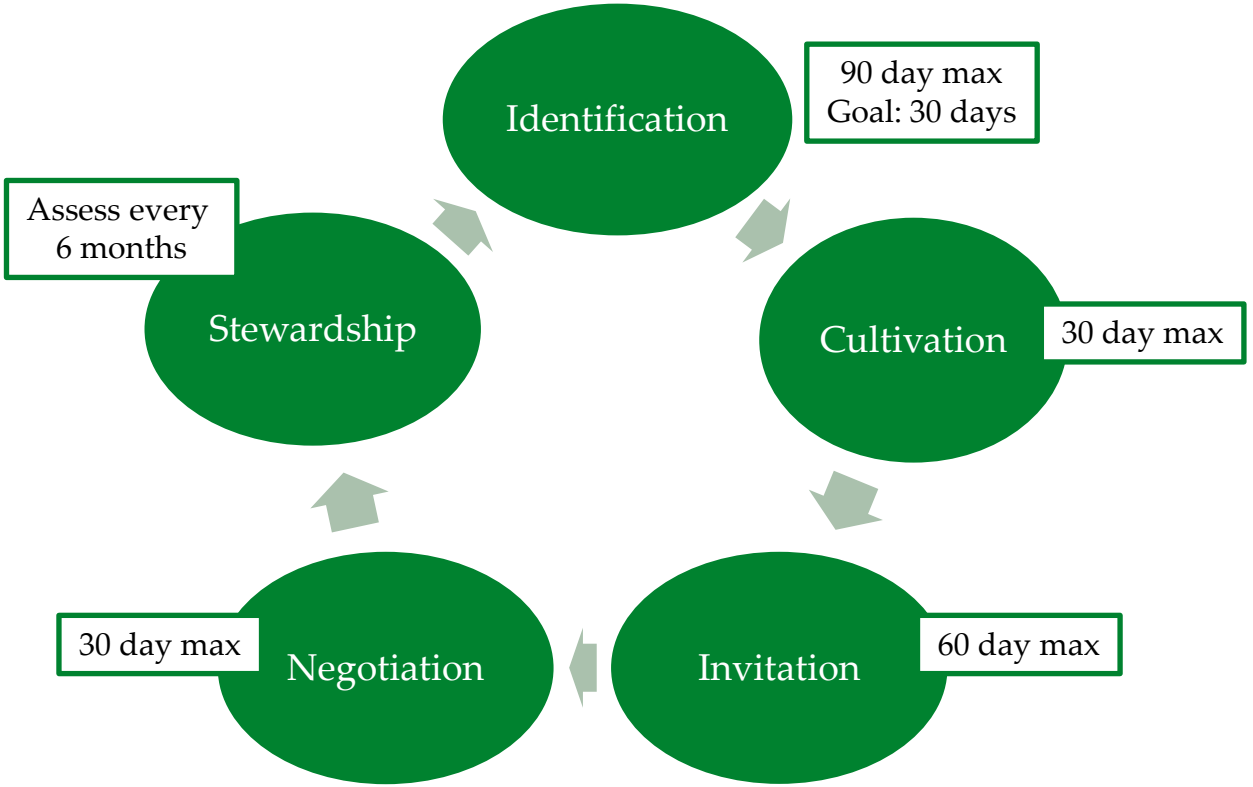
# Stages and Ages

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# Levels of Research

- DonorSearch Report
- Validated Data
- Level One
- Level Two
- Level Three
- Event Bio

Define:

- Stage
- Production Time
  - in house or outsourced
- Contents
  - Higher level, more detail
- Format
- Triggers for Proactive Research

# EPIC integration

**Looking for:**

- Best Practices for HIPAA compliant patient data integration into NXT
- Not to reinvent the wheel

**Investigation:**

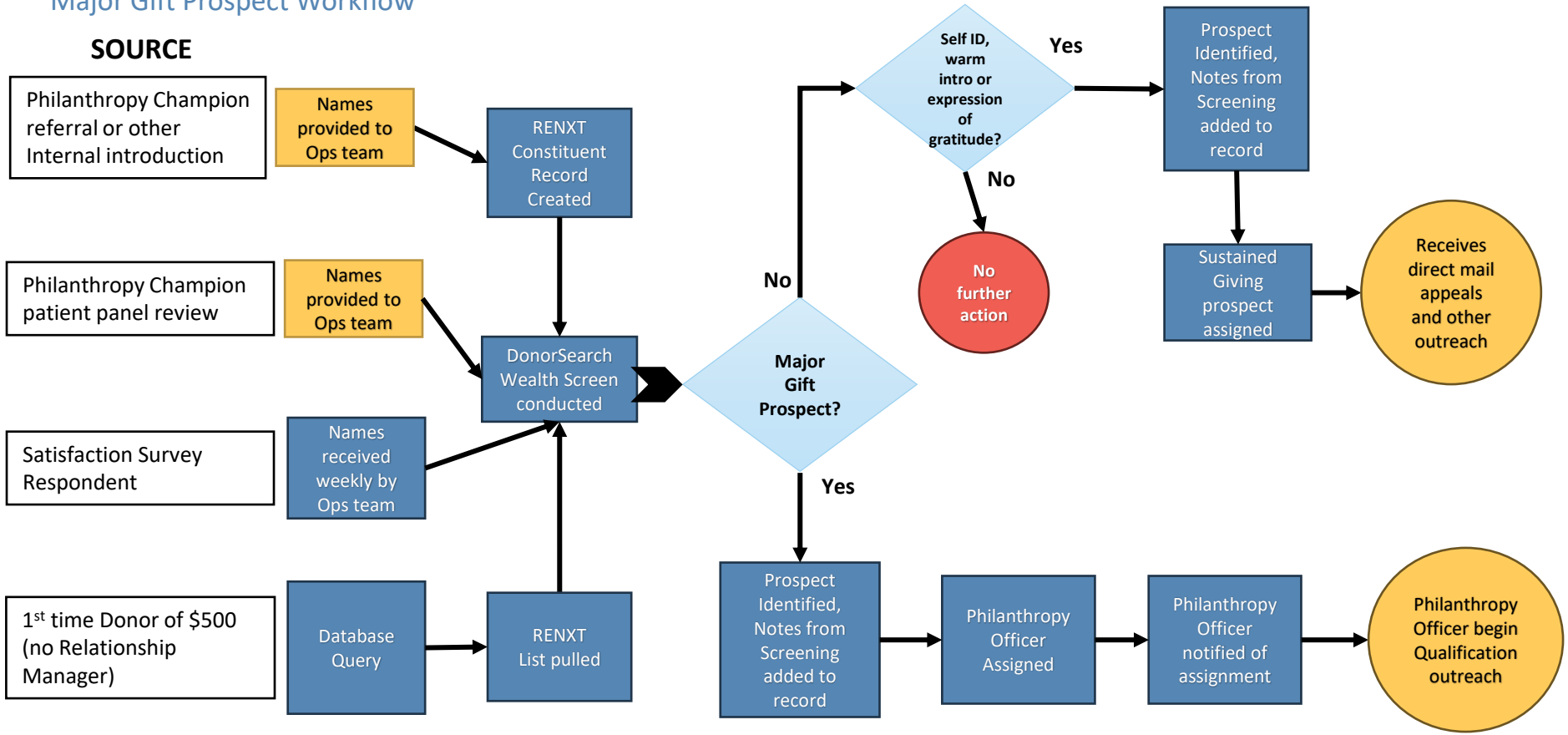
- Interviews with other hospitals
- Pivot
- Pivot again

# Bringing it All Together

Before

| Prospect Source | Wealth Screening? | Follow-up? |
|---|---|---|
| Grateful Patient | Not consistent, no analysis of results | Not consistent, or clear who should respond |
| Patient Panel | Upon request, no analysis of results | Not consistent |
| First-time Donor | Not happening | Not consistent |
| Referral process | N/A | Not in place, not consistent |

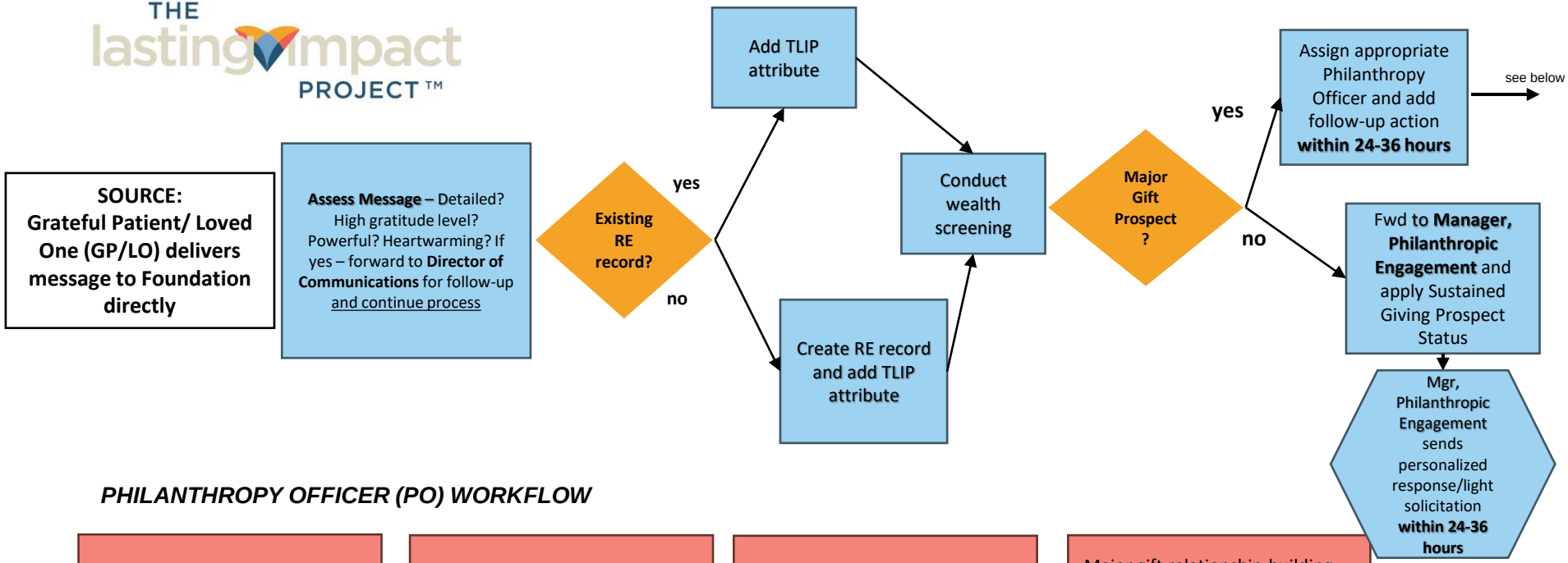
# Major Gift Prospect Workflow



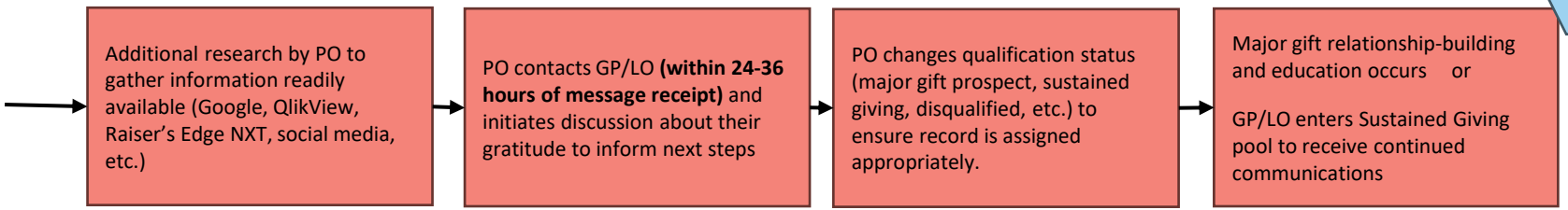



Virtua Health

THE lasting impact PROJECT™




## *PHILANTHROPY OFFICER (PO) WORKFLOW*






Virtua Health

# Takeaways

- ✓ Roles/Responsibilities – defined, understood, created with operational capacity in mind
- ✓ Tweak as needed, and document, document, document!
- ✓ 100% lead follow-up
- ✓ Gift officer AND clinician satisfaction has increased

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"The ability to make a referral within EPIC has been a HUGE difference maker in getting providers on board… Our providers are in their patient's EPIC record during/after every patient encounter, and being able to submit a Philanthropy Referral order at the same time as other orders is easy and very much appreciated by the providers."

- Virtua AVP for Philanthropy

# Thanks!

Please revisit menti.com and enter code XXXXXX to submit questions for the Q&A.

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