

CREATING A GRATEFUL PATIENT MAJOR GIFTS PROGRAM FROM SCRATCH: YEAR ONE

The James



Emily Christian



Thom Harmon

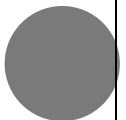
DEFINING “GRATEFUL PATIENT PROGRAM” FOR OUR TALK

- What it could include
 - direct mail, concierge, etc.
- What we are focusing on
 - staffing individual physicians for major gift introductions to their patients



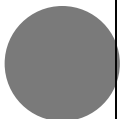
FUNDRAISING PRIORITY CHALLENGES

- Does your institution have a clear vision and a strategic plan that is sellable?
- Do your faculty leaders have clear funding needs?
- How you can drive the conversation to help your leaders crystalize their vision and get their buy-in?
- Clinical vs. Research needs



STAFFING STRUCTURE

- Departments vs. Disease Site?
- Metrics
 - faculty/fundraiser ratio, number of referrals, number of screened patients, number of gifts closed, frequency of internal meetings, etc.
- Miscellaneous areas
 - plastic surgery, basic science, etc.
- Role of wealth screening



TRAINING FACULTY

- Ongoing one-on-one coaching
- Dedicated trainings vs. brief sessions at standing meetings
- Treating faculty like donor prospects



BEING DATA DRIVEN

- Revenue reports
- Fundraiser activity reports
- Faculty metrics



NEW GOALS FOR THE PROGRAMS

- Continuing to evolve and evaluate is important
- Dollars raised
- Staffing/Reporting



QUESTIONS FOR US?

