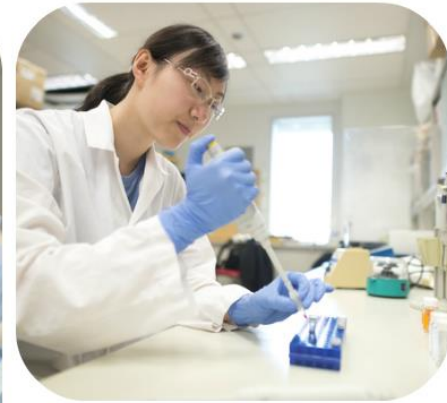


Leveraging Data to Improve Healthcare Fundraising Results



*Case Studies with Mount Sinai
and Pitt Medical*

August, 2020



OUR TEAM



Doug Cogswell

EVP The Pursuant Group,
President Advizor Solutions



Eugenie Packer

Senior Director, Development
Systems & Analytics

Mount Sinai Health System



Paul Silver

Director Prospect Management &
Analytics

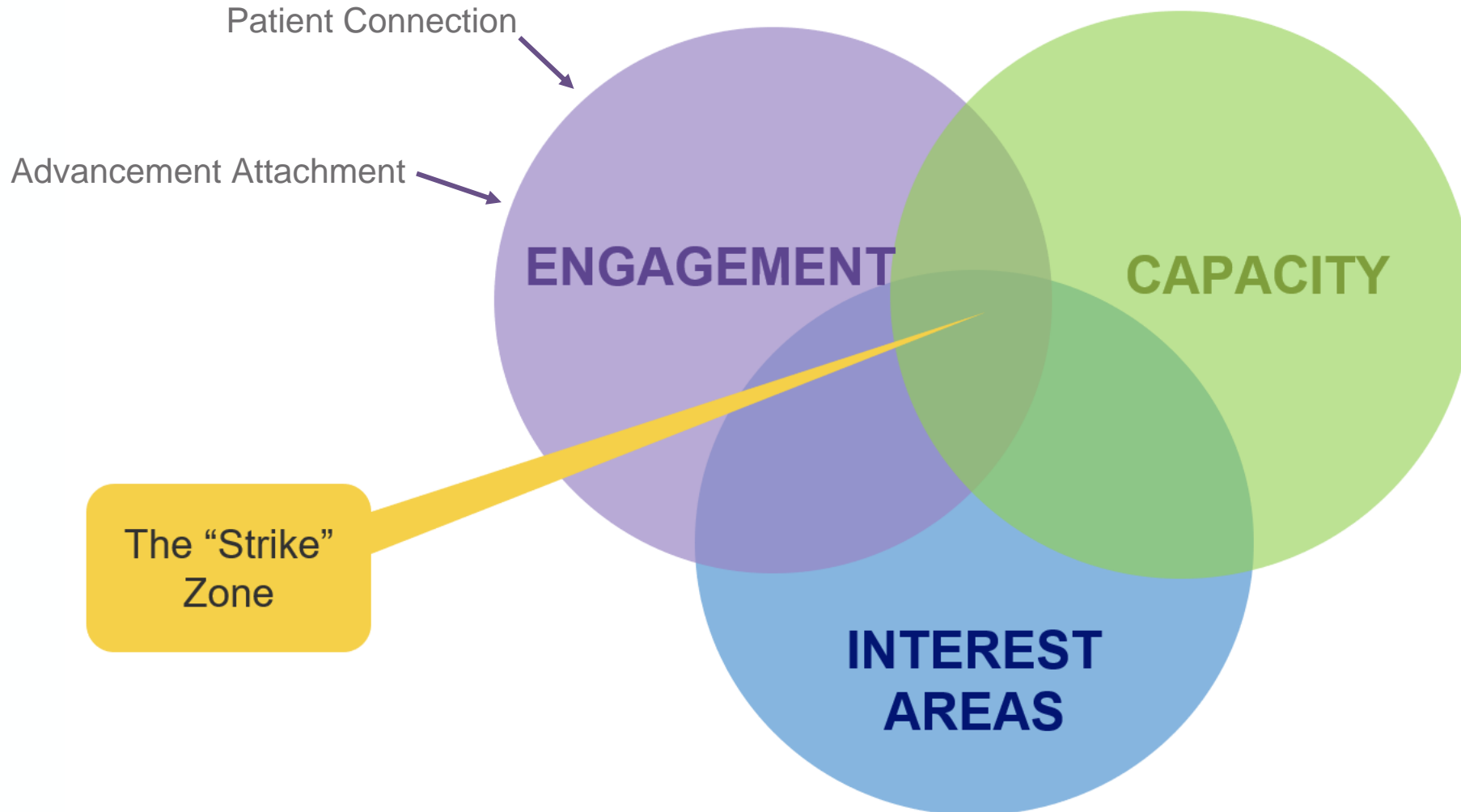
University of Pittsburgh Medical and
Health Sciences Foundation

AGENDA

- Data
- HIPAA
- Strategies
- Stories
- Results
- Q&A



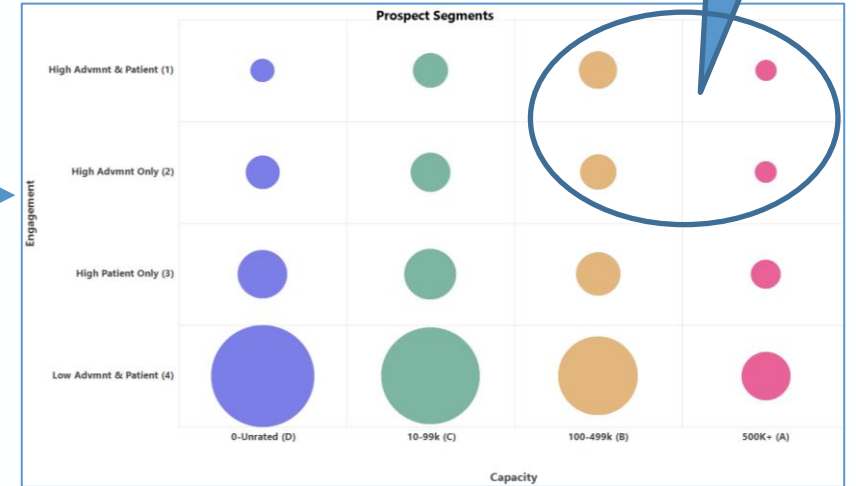
START WITH THE DATA



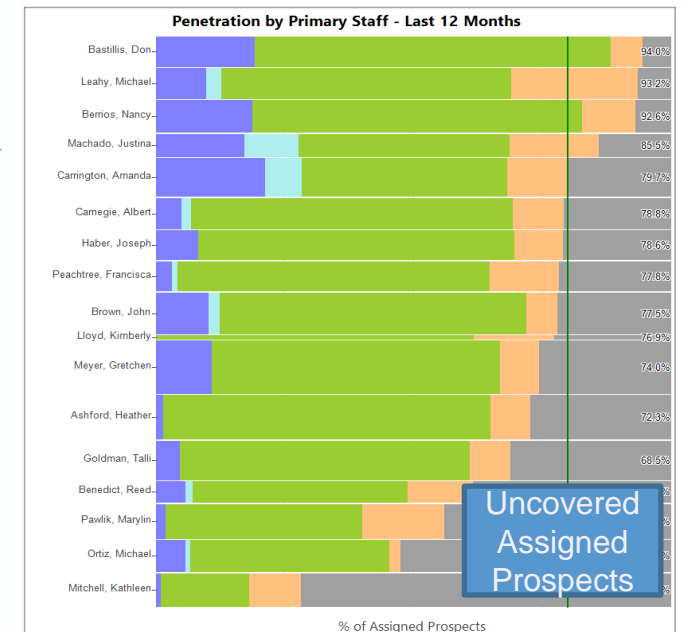
WHAT MATTERS MOST

- Patient Connection
- Advancement Attachment
- Capacity
- Interest Areas → *New Donor Acquisition*
- Portfolio Development:

Segmentation



- Proper Assignments
- Penetration & Connection → *Qualification, Cultivation, Solicitation, Close*
- Movement Through Stages
- Proper Solicitation Levels → *Relative to Capacity and Attachment*
- Yield (aka “Close Rate”)



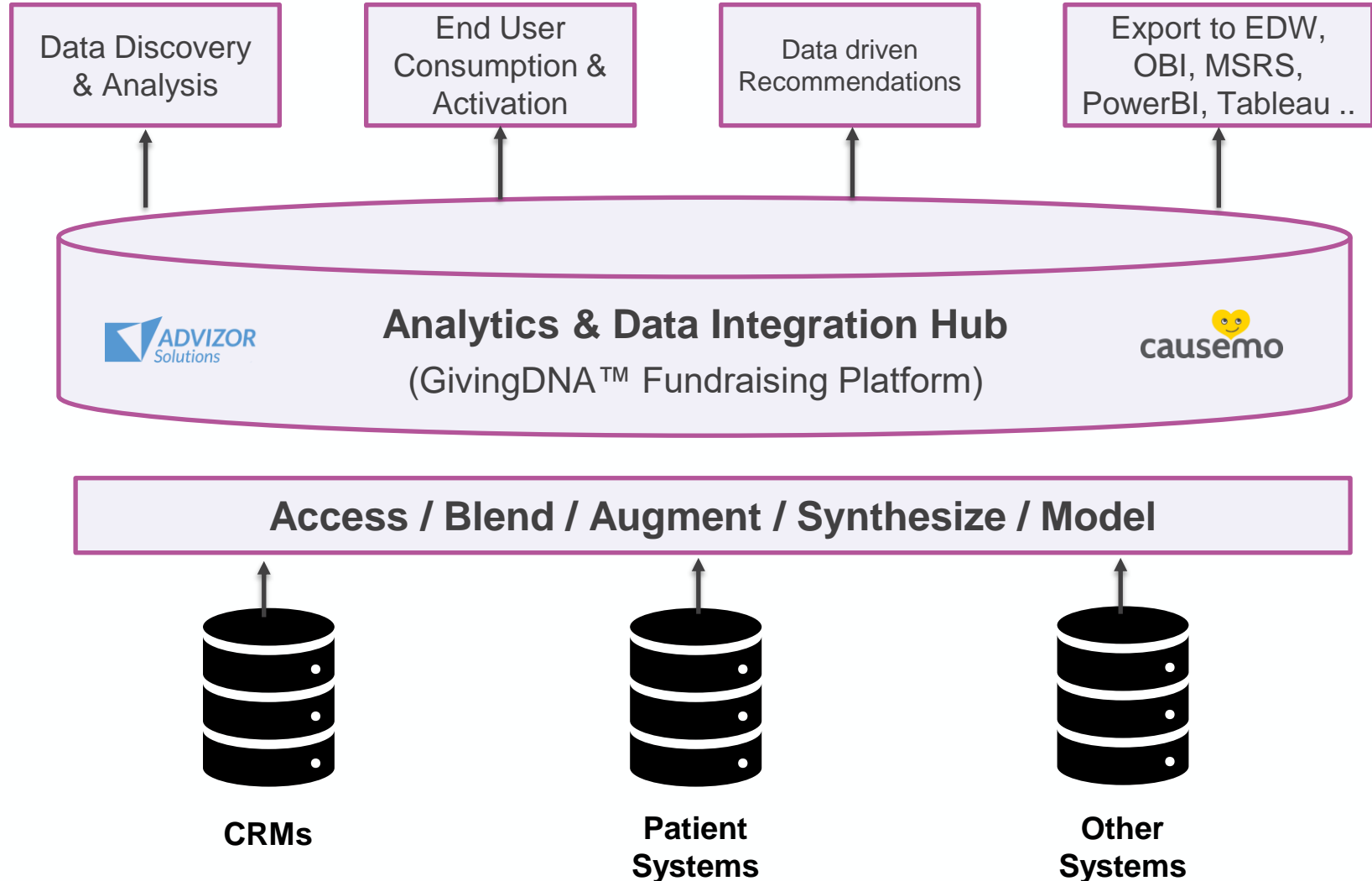
DATA PREP IS KEY

PURPOSE-BUILT HEALTHCARE FUNDRAISING APP

Visualize & Activate

Transform

Ingest



WHAT HIPAA ALLOWS

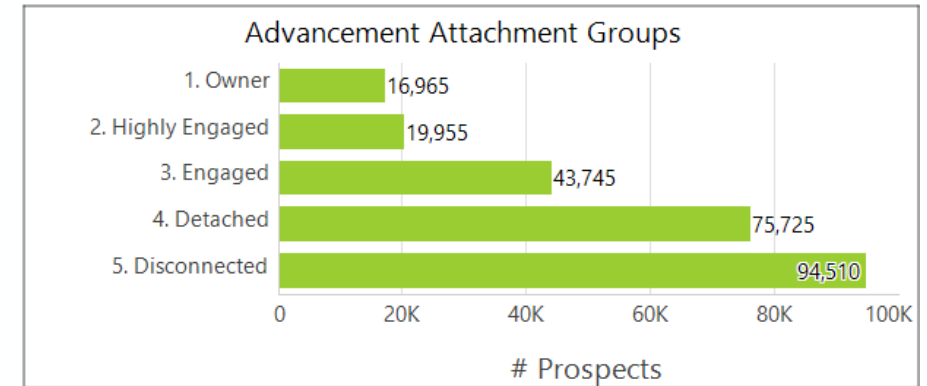
- **Good news is that back in January of 2013 the HIPAA privacy rule was changed so that patient encounters (visits) data can be used for fundraising**
- **Here's what the new rule actually says:**
 - **§164.514(f)(1) A covered entity may use, or disclose to a business associate or to an institutionally related foundation, the following PHI for the purpose of raising funds for its own benefit, without authorization:**
 - Demographic information relating to an individual, including name, address, other contact information, age, gender, and date of birth;
 - Dates of health care provided to an individual;
 - Department of service information;
 - Treating physician(s);
 - Outcome information;
 - Health insurance status
- **This allows healthcare fundraisers to create the factors to feed a patient connection model. And then to also slice and dice the data in an ad hoc manner**



ADVANCEMENT ATTACHMENT (example)

A Predictive Model That Refreshes Daily

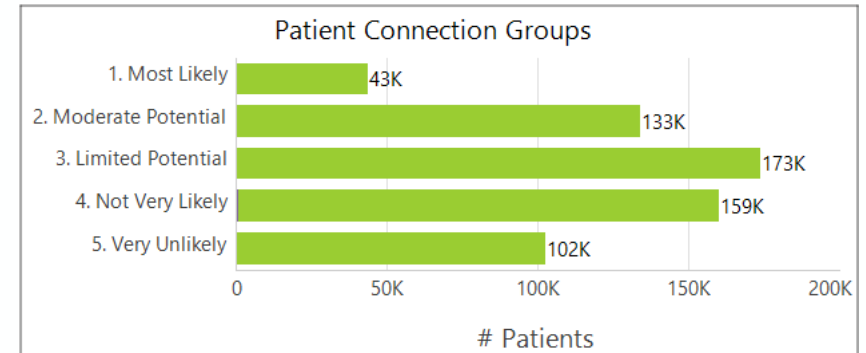
- # Years Given Last 1-2 (+/Square)
- # Years Given Last 3-4 (+)
- # Committees Participated L5Y (+)
- # Events L5Y (+/Square Root)
- # Newsletter Clickthroughs Last 6 months (+/Cube Root)
- # Connections (+)



PATIENT CONNECTION (example)

A Predictive Model That Refreshes Daily

- **Intensity**
 - # Visits Overall (+ up to 49)
 - # Distinct Areas Visited (+; last 3 mo., 12-24 mo.)
- **Duration**
 - Time Between 1st & Last Visit (+)
 - Last Visit was in last 6 mo. (+)
- **Facility**
 - Most Recent Facility Visited (+/-)
- **Area**
 - Most Recent Area Visited (+/-); e.g.:
 - Urology (+)
 - Dermatology (+)
 - ENT Surgery (+)
 - First Area Visited (+/-)
 - Most Recent CPT Group (+/-)
- **Distance**
 - Distance from Hospital (+/log)
- **Demographics**
 - Age (+ from 40 to 90)
 - # Other Patients Related To (+/Cube Root)



CAPACITY

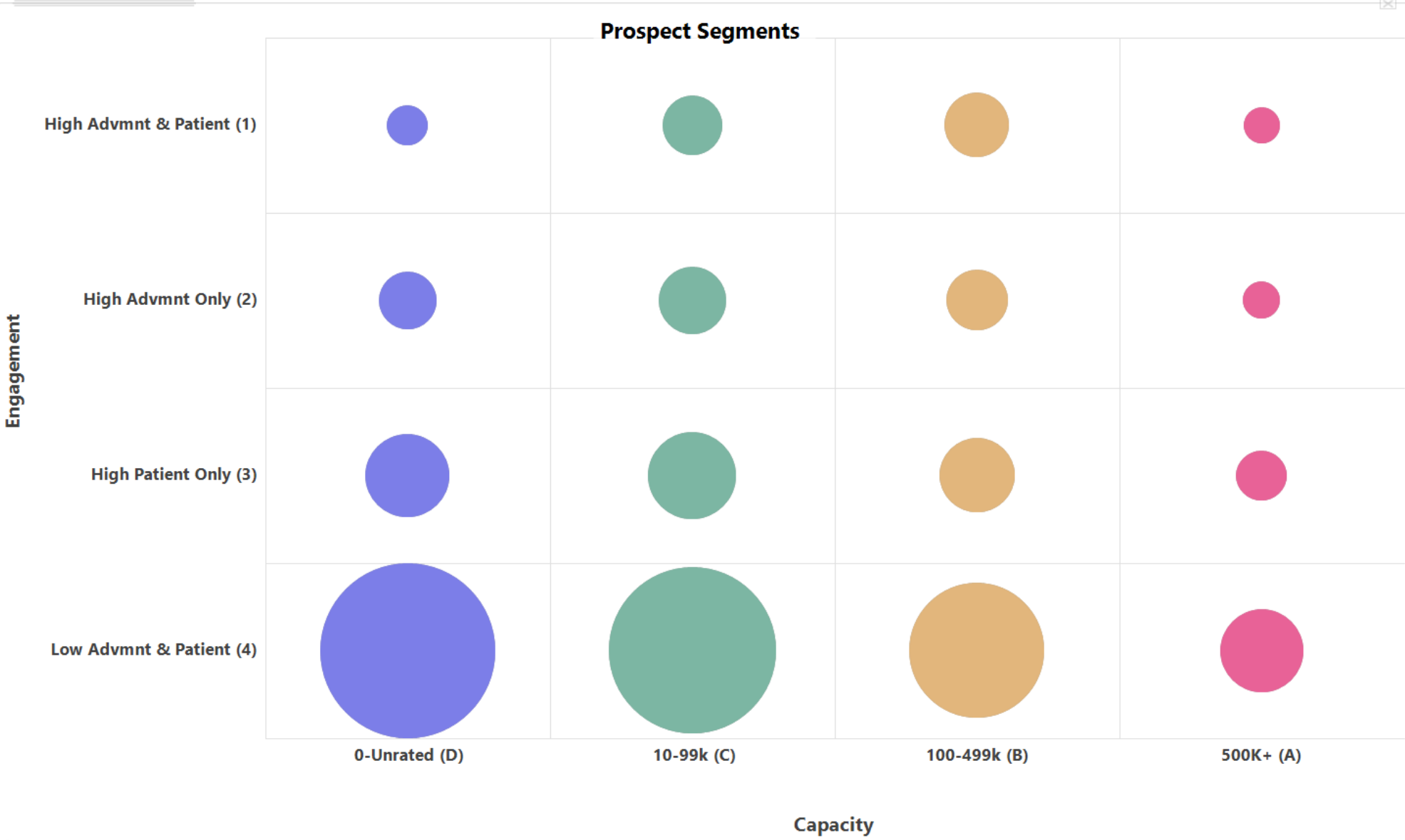
Several ways to get it.
Think pragmatically.

- **Level 1:** Zip Code as a proxy (income, property value)
- **Level 2:** Calculated Wealth Score as a proxy
- **Level 3:** Full Wealth Screen
- **Level 4:** Wealth Screen + Psychographic, Communication Preference, Other Giving, Demographics
- **Other proxies:** Job Level, Country Club, etc.



PROSPECT SEGMENTS

- Prospect List
- Segments
- Capacity Ratings
- Advancement Attachment
- Patient Connection
- Staffing
- Prospect Bio
- Appends
- Map
- Patient Visits
- Details
- Most Recent
- Event Participation
- Giving Summary
- Giving History



Prospects

Statistic	ConnectID
Selected	456,371

- ### Segment Filters
- Last Hospital Visit**
- a. 1 Day
 - b. 2-7 Days
 - c. 8-31 Days
 - d. 32-90 Days
 - e. 91-365 Days
 - f. 366+ Days
- Capacity**
- 0-Unrated (D)
 - 10-99k (C)
 - 100-499k (B)
 - 500K+ (A)
- Engagement**
- 1. High Advmnt & Patient
 - 2. High Advancement Only
 - 3. High Patient Only
 - 4. Low Advmnt & Patient

Prospect List

Name	ConnectID
Abbott, Domitila	51776
Abdallah, Enola	38681
Abe, Donetta	8711
Abe, Mackenzie	11302
Abele, Madalene	25965
Abele, Morgan	60208
Abercrombie, Darrin	79903
Abercrombie, Emma	40500

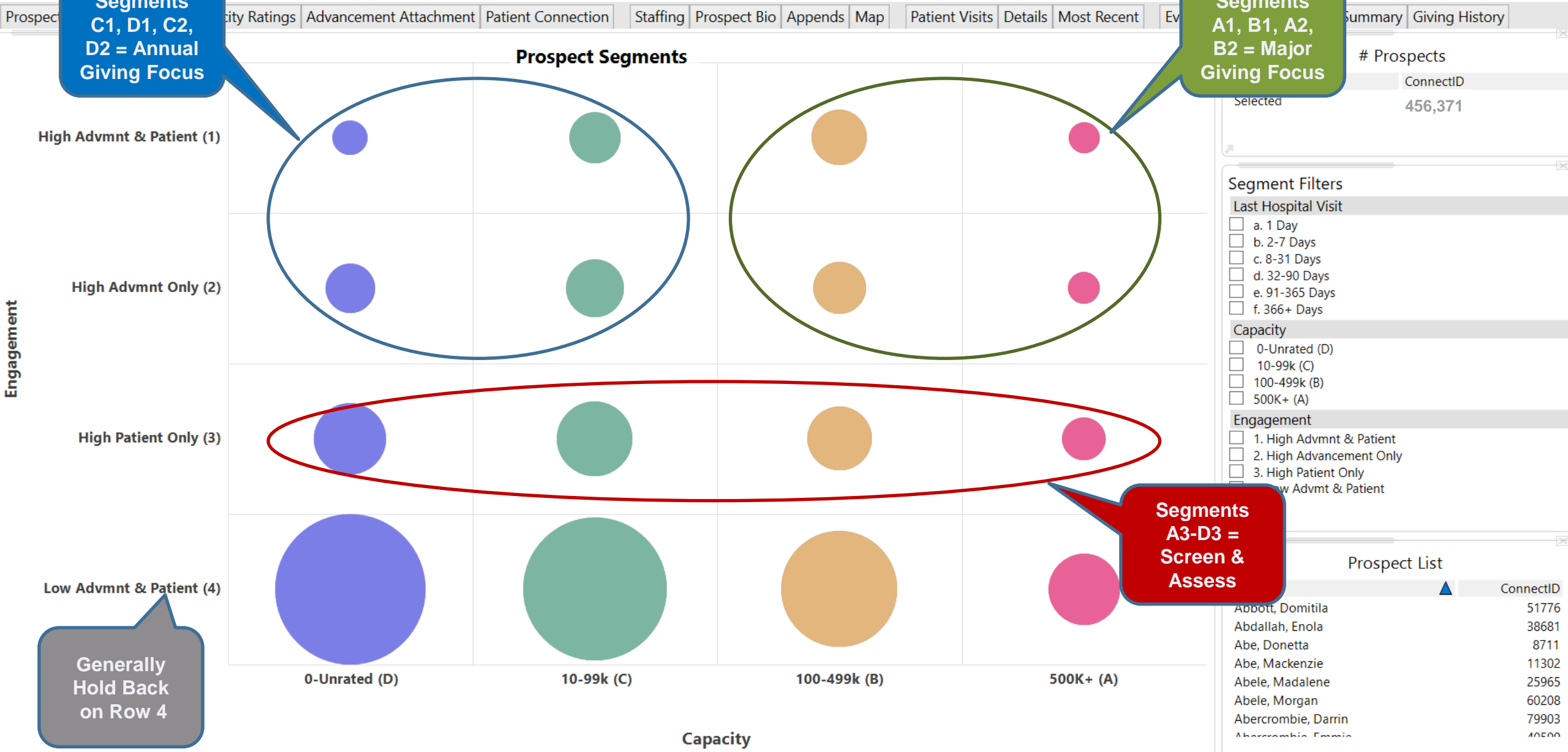
PROSPECT STRATEGY

Segments C1, D1, C2, D2 = Annual Giving Focus

Segments A1, B1, A2, B2 = Major Giving Focus

Segments A3-D3 = Screen & Assess

Generally Hold Back on Row 4



# Prospects	ConnectID
Selected	456,371

Segment Filters

Last Hospital Visit

- a. 1 Day
- b. 2-7 Days
- c. 8-31 Days
- d. 32-90 Days
- e. 91-365 Days
- f. 366+ Days

Capacity

- 0-Unrated (D)
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FIND INTEREST AREAS

- **Internal Data Sources**

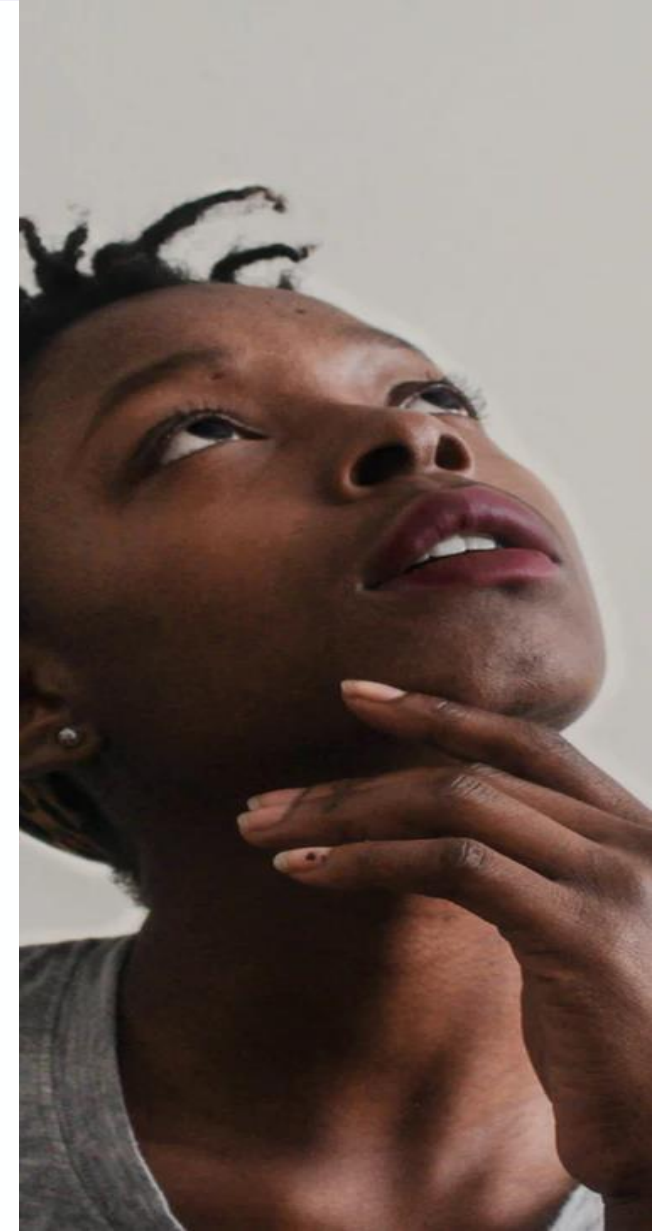
- Patient Experience
- Field of Work
- Types of Events attended
- Newsletter Articles clicked on
- Survey Data
- Etc.

➔ *Automated Smart Parsing™ can flag, bin, and rank this information out of the “raw” data*

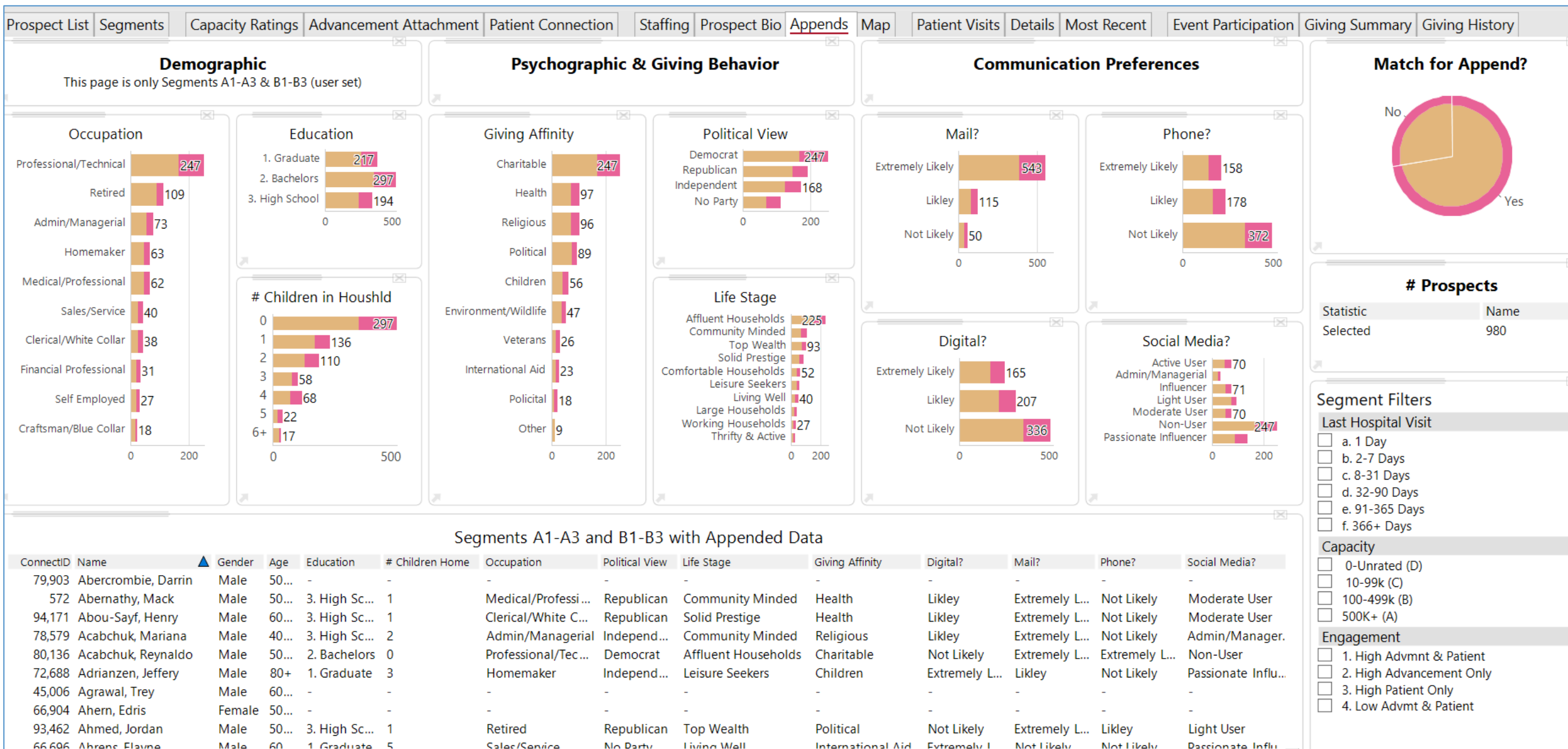
- **Newsletters**

- “Probe” for interest areas through the articles you run
- “See” connection to your cause by how often they click

- **External Appends (see next page)**



AUGMENT WITH DATA APPENDS



Use Case Discussions



Eugenie

Mount Sinai

1. What triggered your initial interest in leveraging your data like this?
2. What are a couple of the core problems that you were trying to solve?
3. What tools have you tried? What other tools do you additionally use today? Why?
4. What have been some of the successes?
5. What's missing? What else would you like to be able to do?
6. Final thoughts?



Paul

Pitt Medical

University of Pittsburgh

- Ranked No. 18 among nation's top public colleges and universities in 2020 U.S. News and World Report Best Colleges rankings
- 33,744 Students
- 331,873 Living Alumni
- Ranked No. 5 among U.S. universities in competitive grants awarded to members of its faculty by the National Institutes of Health



Icahn School of Medicine at Mount Sinai

- Ranked No. 20 in Best Medical Schools for Research in 2020 U.S. News and World Report Best Colleges rankings
- 1,233 Students ▪ 2,000+ Residents/Fellows ▪ 582 Postdocs
- 37,026 Living Alumni
- Ranked No. 12 among U.S. medical schools for National Institutes of Health funding



University of Pittsburgh Medical Center (UPMC)

- \$21 billion health care provider & insurer based in Pittsburgh, PA
- Largest non-governmental employer in PA (90,000+ employees)
- Operates 40 academic, community and specialty hospitals, 700 doctors' offices and outpatient sites, employs 4,900 physicians
- UPMC-Pitt collaboration: supports interrelated teaching, research, clinical care and community service missions



Mount Sinai Health System

- Began as a single hospital in 1852, now with eight hospital campuses in New York metropolitan area
- 7,200+ physicians ■ 410+ ambulatory practice locations ■ 39 research and clinical institutes ■ 42,000+ employees
- 152,520 inpatients ■ 3.5M outpatients ■ 536,443 ER ■ 13,864 babies
- Mount Sinai Hospital – ranked no. 14 for *Best Hospital* and no. 1 in Geriatrics in latest U.S. News & World Report



University of Pittsburgh

Division of Philanthropic and Alumni Engagement (PAE)

- Part of PAE is the Medical and Health Sciences Foundation (MHSF)
- Founded in 2003, MHSF raises funds for the University of Pittsburgh's six health science schools and UPMC hospitals



Mount Sinai Health System Office of Development

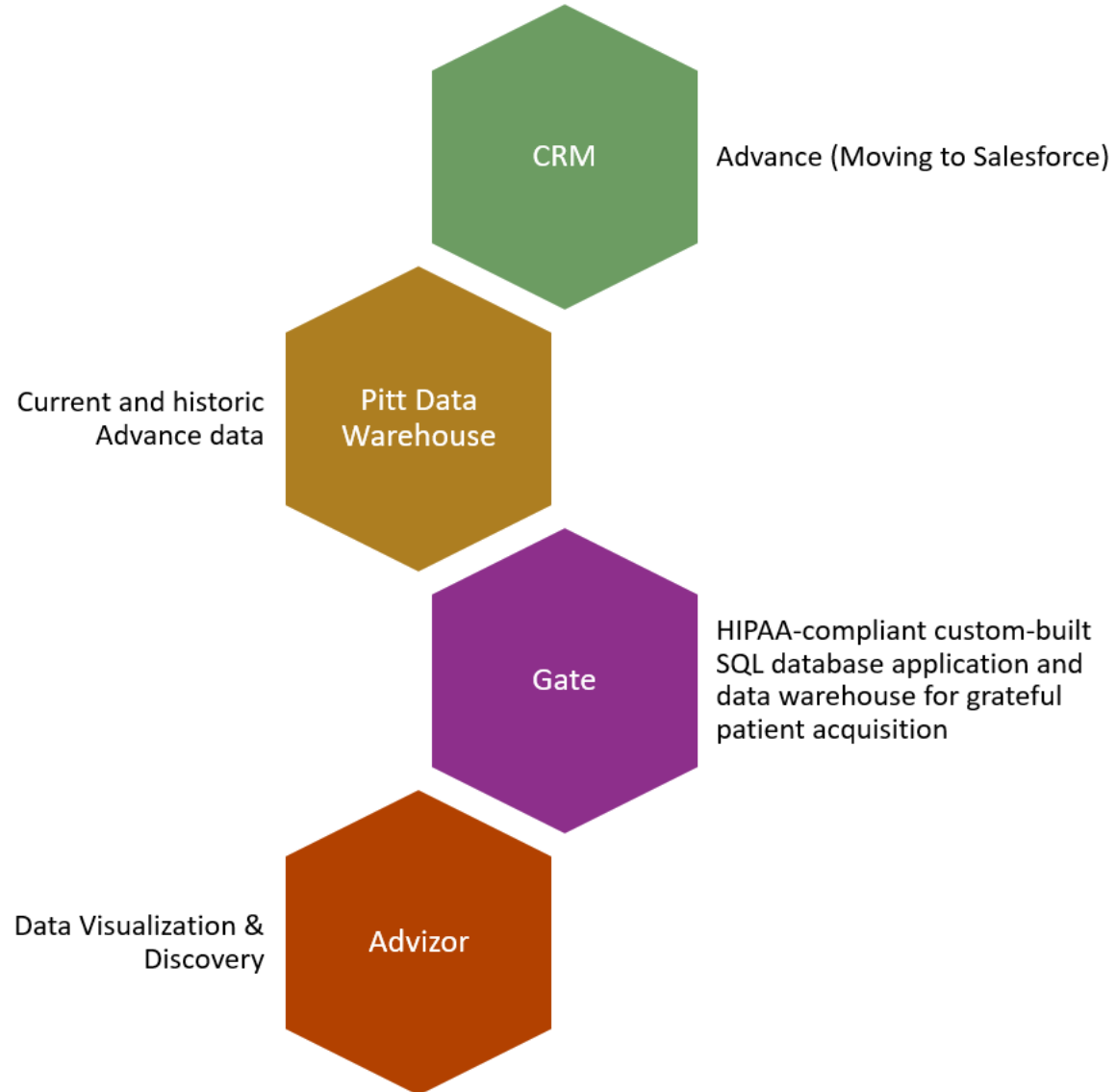
- One centralized department for all official fundraising activities and gift acceptance
- Raise funds for all seven hospitals in New York City and the Icahn School of Medicine at Mount Sinai



Pitt-UPMC

Medical and Health Sciences Foundation

Ecosystem



Mount Sinai Health System Office of Development

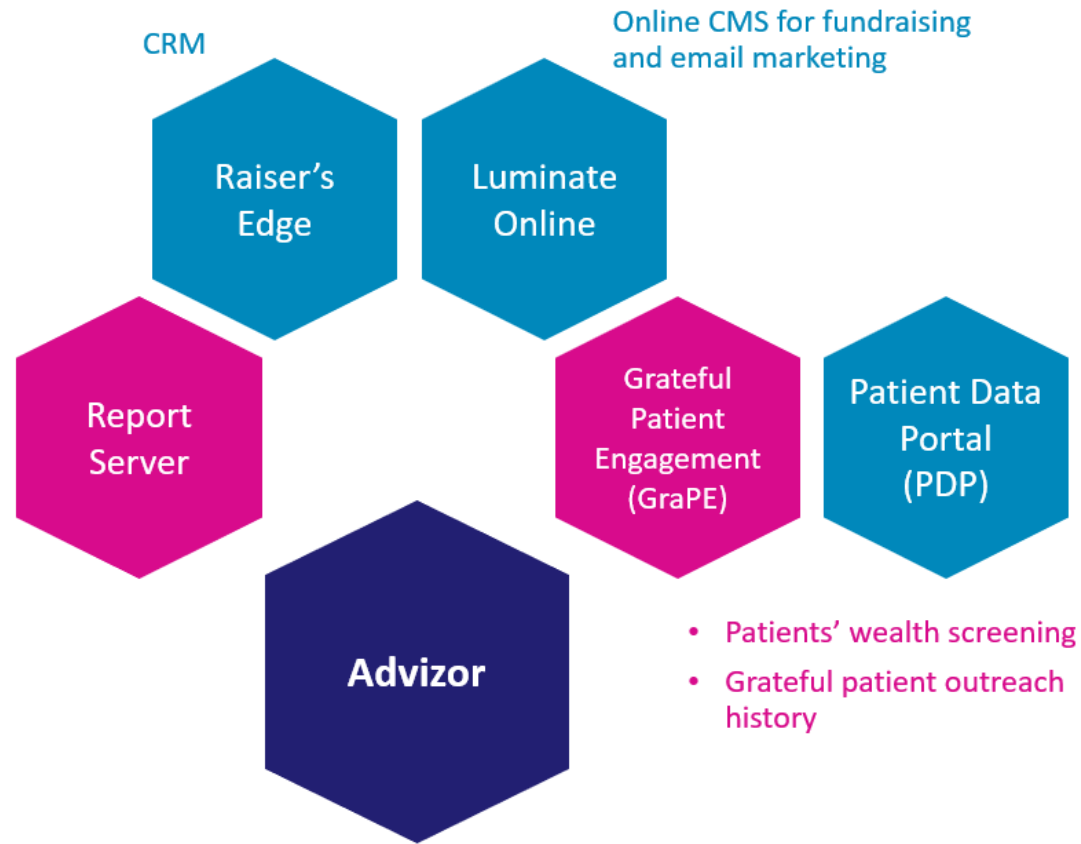
Ecosystem



Personalized Reports



Interactive Dashboards



- Patients' wealth screening
- Grateful patient outreach history

- In-memory Data Warehouse for patient & donor look-up
- Predictive Models
- Annual Giving Renewals and Segmentations



Smaller Provider Office of Development

Ecosystem



Personalized Reports

CRM



Patient System

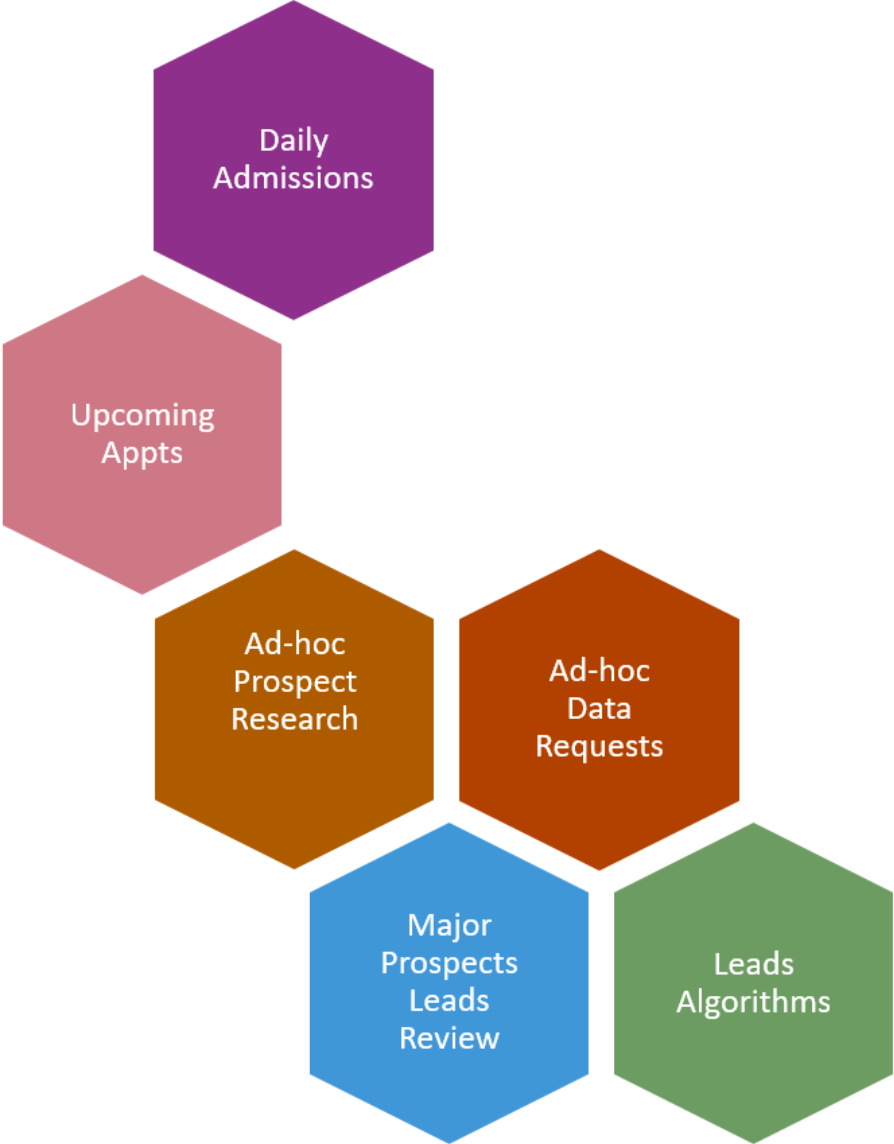


- In-memory Data Warehouse for patient & donor look-up
- Predictive Models
- Annual Giving Renewals and Segmentations

Pitt-UPMC

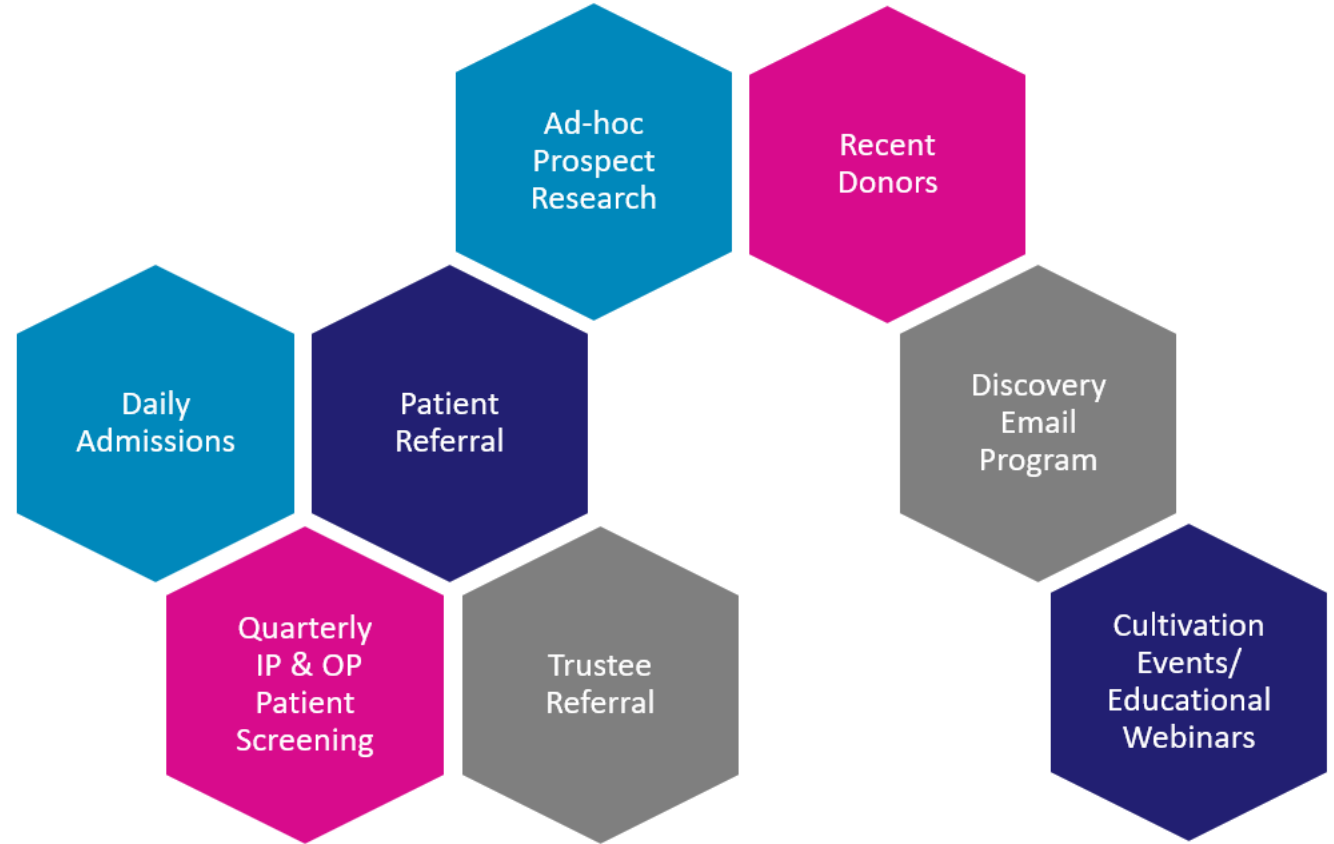
Medical and Health Sciences Foundation

Six channels for clinical prospect identification



Mount Sinai Health System Office of Development

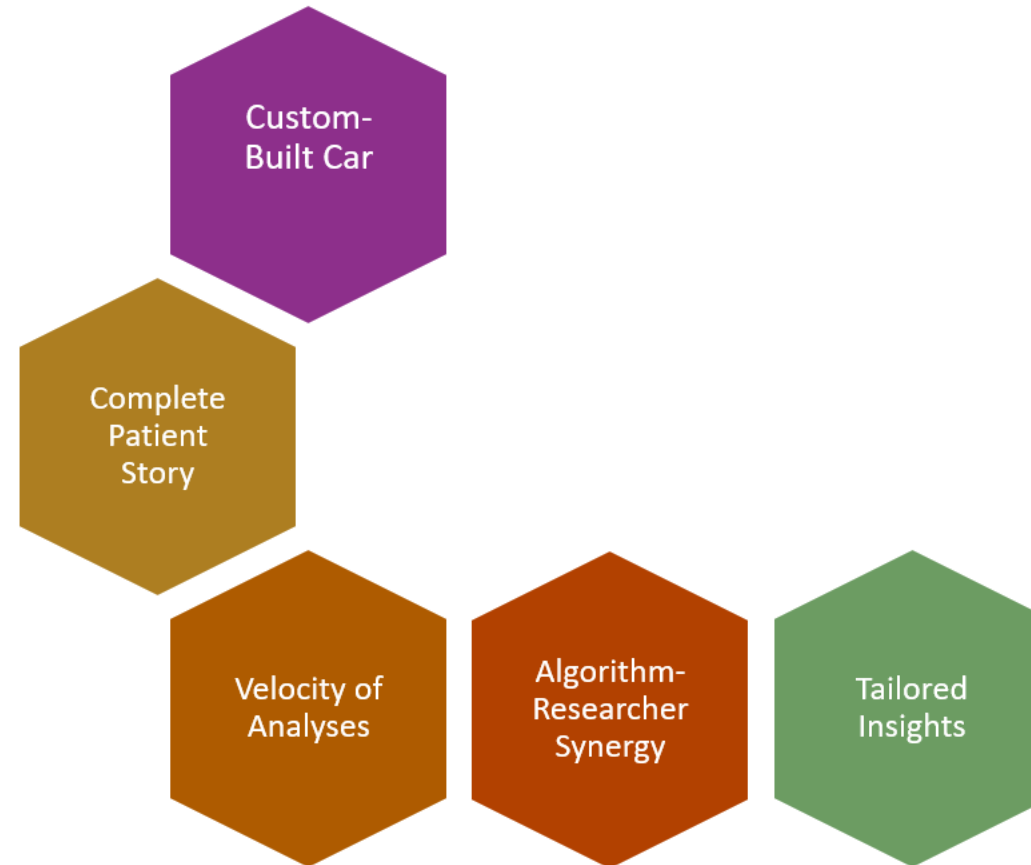
Eight channels for clinical prospect identification



Impact

Full-Throttle Operational Capacity

Systems, Analytics, Prospect
Research & Management



Q&A AND FOLLOW UP



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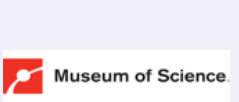



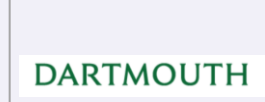









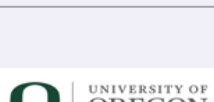
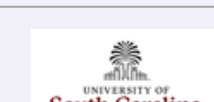



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www.ContinueTheDialog.com

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 American Cancer Society	 PAN Foundation	 OPEN DOOR MISSION Transforming lives through RECOVERY HEALING LEARNING	 FEEDING AMERICA	 CYSTIC FIBROSIS FOUNDATION	 The Global FoodBanking Network	 HOUSTON SPCA	 Guiding Eyes for the Blind	 HUMANE SOCIETY INTERNATIONAL WILDLIFE LAND TRUST
 JDRF IMPROVING LIVES. CURING TYPE 1 DIABETES.	 Habitat for Humanity	 Stanford MEDICINE	 Mount Sinai	 Arkansas Children's HOSPITALS • RESEARCH • FOUNDATION	 MOFFITT CANCER CENTER	 GATEWAY FOR CANCER RESEARCH	 Seed Company Bible Translation. Life Transformation.	 MISSION OF Hope
 alzheimer's association	 NYU Langone Health	 BCM Baylor College of Medicine	 Boston Children's Hospital Until every child is well	 GARDEN of DREAMS	 MS National Multiple Sclerosis Society	 Penn Medicine	 Children's Hospital Colorado	 VIRGINIA HOSPITAL CENTER FOUNDATION
 CitySquare	 Museum of Science	 AaBbCc BARBARA BUSH FOUNDATION FOR FAMILY LITERACY	 NATIONAL MATH + SCIENCE INITIATIVE	 WASHINGTON NATIONAL CATHEDRAL	 DARTMOUTH	 Berklee College of Music	 McGill UNIVERSITY	 LSU LOUISIANA STATE UNIVERSITY
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