

Beebe Medical Foundation— Creates Seamless Prospecting Workflow



Beebe Medical Foundation is a single, 280 bed facility in Lewes, DE. Their implementation plan includes targeting grateful patients, immediate analysis of recent donors and integration into their donor management system (DMS). Some of their strategies include:

New Patients

Monthly screening of inpatient, emergency care, cancer, cardiac, and physical-therapy patients from the previous month. They exclude those under 30 years old and any charity care. The file is de-duped against patients from last six months so they don't screen or solicit the same patient twice and then they:

- Mail to all screened patients except those without match data
- Track the response rate from monthly mailings (consistent at 1.3% with average gift of \$77)
- Call top five to ten screened patients in addition to mailing

Donors

Each week the development staff runs a report and meets to discuss the previous week's donors (see sample below). The report contains information from their DMS system: donor's name, giving info and other prospect information. It also includes their prospect research data—RFM, inclination to give, giving capacity, P2G (Propensity to Give), influence, etc.—to help identify future gift potential and possible known relationships. Top prospects are called for appreciation, seeking appointment, or other action.

"DMS integration is a great resource for me; I can find major donor prospects among my annual donors and choose who to call on immediately following their gift. The prospect research ratings are handy—there are many donors who we've chosen to reach out to personally after a small annual gift because the gift capacity rating is right in our report. I use a similar report for other prospecting lists, like when I travel out of the area."

—Alex Sydnor, Executive Director
Beebe Medical Foundation



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Sample Weekly Report	DMS Information		WealthEngine Data
Donor A Address Address Type: (Home, Business, Other) Contact Information: <ul style="list-style-type: none"> • Home Phone • Work Phone • E-mail 	Last Donation: \$20 Type: Memorial Gift Largest Donation: \$500 First Donation: \$500 Donation Total: \$520	Date: 7/11/2008 Date: 5/5/2004 Date: 5/5/2004 No. of Gifts: 2	Giving Capacity: \$11,137 Inclination Rating: 1 Influence Rating: 3 RFM Recency: 71 RFM Frequency: 60 RFM Money: 73 P2G: 4 – 0 = Annual Fund Prospect
Donor B Address Address Type: (Home, Business, Other) Contact Information: <ul style="list-style-type: none"> • Home Phone • Work Phone • E-mail 	Last Donation: \$100 Type: Unsolicited Largest Donation: \$100 First Donation: \$100 Donation Total: \$100	Date: 1/27/2009 Date: 1/27/2009 Date: 1/27/2009 No. of Gifts: 1	Giving Capacity: \$107,827 Inclination Rating: 2 Influence Rating: 4 RFM Recency: 87 RFM Frequency: 41 RFM Money: 52 P2G: 2 – 5 = Major Gift Prospect
Donor C Address Address Type: (Home, Business, Other) Contact Information: <ul style="list-style-type: none"> • Home Phone • Work Phone • E-mail 	Last Donation: \$525 Type: Golf Classic Largest Donation: \$50,000 First Donation: \$100 Donation Total: \$73,140	Date: 10/4/2008 Date: 1/4/2007 Date: 9/24/1999 No. of Gifts: 7	Giving Capacity: \$1,322,000 Inclination Rating: 1 Influence Rating: 1 RFM Recency: 98 RFM Frequency: 85 RFM Money: 83 WE Inner Circle Flag: Y WE P2G: 1 – 0 = Major Gift, Capital Campaign or Planned Giving