

Yale-New Haven Hospital



Data Confirmation and Validation Strategy for Regular Screening Supports 300% Growth in Major Gifts

Qaya Thompson, Development Researcher at Yale-New Haven Hospital (YNHH), doesn't believe in creating any barriers to prospect research. "I support seven development officers (DOs)," says Thompson, "and I want them to have accurate wealth information when and where they need it, as timing is everything in fundraising. All of our development staff have access to FindWealth Online and use it as their primary prospect research tool."



The development officers have been shown how to use and interpret the analytics, such as the WealthEngine gift capacity ratings and P2G™ (propensity to give) scores, which are also integrated into YNHH's Raiser's Edge database. Thompson adds, "If they need further information or justification of data, I do in-depth research and create a more comprehensive profile."

This inclusive strategy has paid off. Conducted during a capital campaign, major gifts (\$10,000+) to the hospital have grown by nearly 300% since 2005. Thompson also estimates that patient giving, although there is no current tracking process dedicated to patient giving exclusively, has grown ten-fold over that same time period.

A Work in Progress

According to Thompson, YNHH's data confirmation process is still a work in progress, "as we gain experience from routine screening, we continue to fine-tune the process to identify those individuals who are most capable of making a gift." There are certain populations that are excluded from patient screenings. For example, maternity and psychiatric patients are omitted, as well as patients with certain insurance coverages.

After the initial data confirmation has been completed, the records are sent to WealthEngine on a routine basis. Most screenings are done on a daily and weekly basis. These numbers can total upwards of 425 records per week, including weekends.

"At first, we conducted only monthly and weekly screenings but we realized that we were missing potential prospects who were admitted through the emergency areas. This prompted us to initiate daily screenings," says Thompson, "being able to connect with our patients during their stay is the most effective strategy when cultivating future major gifts."

Yale-New Haven Hospital



Data Confirmation and Validation Strategy for Regular Screening Supports 300% Growth in Major Gifts

Action Plan

The prime goal in the Development Office is to review the screened lists as early as possible in order to connect with patients before they are discharged.

The entire system is a work in progress and changes are made as needed to make sure that the process produces the best results.

The DOs offer complimentary guest parking and meal tickets as well as information on the New Haven area to try and make the hospital visit more comfortable for both the patient and their families. The Development Office has adopted a “Moves Management” process to track the progress of cultivation. All moves and actions, including phone calls and face to face visits, are entered into Raiser’s Edge by the DOs upon completion. This way members of the development staff can review all correspondence between the department and hospital donors or prospects.

“Those who do not meet the gift capacity levels for major gift solicitation are added to our acquisition appeal mailings,” says Thompson. By doing this they are not only identifying high major gift candidates, but also increasing their lists for appeal mailings.

The results show that major gifts now make up a greater percentage of the overall contribution total. In 2005, major gifts comprised 62% of overall contributions. With the increase in daily and weekly screenings by 2009, major gifts had grown to account for 77% of overall contributions. This development in giving coincided with the Campaign for the Smilow Cancer Hospital at Yale-New Haven. Frequency based screenings helped identify patients who should be visited during their hospital stays which resulted in an increase in major gifts to the campaign.

“When it comes to data confirmation and validation, you only get what you put in. Our experience with daily and weekly screening has allowed us to fine tune our procedure for the best cultivation strategy. We have an efficient workflow in place that ensures that our data is clean and that we are targeting the right prospects.”

—Qaya Thompson
Development Researcher

For more information email us at marketing@wealthengine.com.