



**First Things First**



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[www.fundraisingcounsel.com](http://www.fundraisingcounsel.com)



from the remote desk of  
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## 3 Essentials of Grateful Patient Programs

How do you effectively communicate the need for funding in a way that motivates donors to contribute?

One of the most natural methods, and the one that often yields the best return, involves tapping into patients who have received services from your hospital and are pleased with the care. These grateful patients visited your institution, developed important relationships with your faculty (physicians, nurses and other key staff), and gained some type of positive result from the experience. As a result, grateful patients are your best ambassadors in the community and are highly likely to contribute because they understand the value and impact contributions make.

It makes sense that you would develop a program to reach these potential donors. There are three components of a successful grateful patient program: wealth screening, staff involvement and follow up.

### 1. Wealth Screening

Wealth screening is nearly ubiquitous in all facets of fundraising now and that is no different in healthcare. Hospitals conduct daily screenings to capture timely patient encounters. Similarly, hospitals should be dedicating resources to gathering wealth-screening data on their patients.

Before you start, make sure your staff understands the minimum amount of information it needs to successfully screen patients and that everyone involved is aware of the laws pertaining to patient privacy. AHP's Fundraising Under HIPAA is a helpful resource to understand the regulations surrounding grateful patient program fundraising activities.

**[Once you have identified prospective donors....](#)**

## **Best of the Web:** ***Industry Trends***

One of the challenges facing development leadership today is the retention of key staff members. Turnover in development is high. In fact, some would argue it is an unprecedented high. A culture of numbers - dollars, donors, visits, solicitations, etc. - has become the norm and now seems to dominate many of the manager/staff interactions.

Technology has fostered and facilitated this philosophy, which tracks every possible activity value. In many ways, this has made our industry more disciplined - something that can be viewed as being positive. But there's a backlash brewing.

We frequently hear from high performing staff members saying their managers do not care to hear anything but statistics. These individuals, who were originally hired for their ability to close gifts and form strong and lasting relationships in addition to raising funds for the organization, are left wondering if their abilities really matter.



**[Here's timely \*insight\* for leading a team...](#)**



## Listen and *Learn*....

### **On Board and Institutional Governance: Insights from AGB President**

**David King**, Alexander Haas President & CEO, speaks with **Rick Legon**, President of the Association of Governing Boards, which was founded to educate board trustees and presidents of primarily colleges and universities on their fiduciary responsibilities. **Don't stop reading** because he leads an education organization.

**There's stuff in this podcast that is very useful for the social sector.**

For example...in recent years, the Association has seen a shift in the level of board expectations. Legon discusses the concept of "consequential governance" which means that board members must ask the questions that truly matter to their institutions; to be fundamentally engaged in doing real work on the issues facing the organization now and in the future. **Social sector boards and leadership should evaluate their governance model** to see if it is still relevant and effective in meeting the challenges of the institution.

[Take a listen...](#)



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## We'd Like You to *Know*...

### ***Transforming Institutions***

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### ***Our Transformational Services***

Alexander Haas offers a wide range of fundraising consulting services for organizations of all sizes. Our priority is to help transform institutions that transform lives. Whether you are readying for a capital campaign or need to assess your annual fund, our services are tailored to each individual client.

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