



CASE STUDY

UNC Health Foundation Advances Grateful Patient Fundraising with Analytics



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—Eli Jordfald, Executive Director for Healthcare Philanthropy

Overview

Pursuing an ambitious \$1 billion campaign goal to advance the health of residents throughout North Carolina and around the globe, UNC Health Foundation uses data analytics and performance metrics to reach the right donors with the right messages, amplifying results and renewing clinician confidence in organized efforts to engage grateful patients and families as supporters of UNC Health.

After adopting Blackbaud’s Patient Conversion Model™ together with Affluence Insight™ at the start of the fiscal year, the total value of major gifts from grateful patients and families closed by the team in the first three quarters increased more than 73% over the same period in the previous fiscal year. It should be noted that the Blackbaud model was used in conjunction with many other strategies the Foundation deployed, and that these worked in tandem with the model to realize the achieved level of success.

In addition, when using those Blackbaud tools along with more frequent and more tailored appeals, the Foundation saw the number of responses to its grateful patient/family appeals for annual giving increase 164% over that same time period, year-over-year.

UNC Health Foundation is powered by:

Patient Conversion Model™

Affluence Insight™

Blackbaud CRM™



The Foundation has a successful history of working with grateful patients and their family members. Pro tennis player John Isner partnered with UNC Health to name a cancer hospital reception area for his mother, Karen, in gratitude for her care. The family was joined at the unveiling by cancer center director Dr. Shelley Earp and Karen's surgeon, Dr. Ben Calvo.

The Organization

With a staff of 57, UNC Health Foundation supports the medical professionals and healthcare providers of UNC Health, North Carolina's largest academic health system. UNC Health is headquartered in Chapel Hill and affiliated with the University of North Carolina School of Medicine, which has 3,200 physicians, a dozen hospitals, and 350 clinic locations across the state.

The Foundation raises funds to train the next generation of expert physicians and scientists, move world-renowned research from the bench to the bedside, and provide the best possible patient care. Key leadership initiatives involve cancer, children's health, medical education, global health, neurosciences, and advancing health.

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The Challenge

UNC Health Foundation has been at the forefront of the evolving grateful patient movement in healthcare philanthropy with its cancer center development team closely partnering with physicians as early as the mid-2000s, before the term “grateful patient” was commonly used.

In 2013, changes to federal privacy laws allowed healthcare systems greater access to protected health information to engage with their patients, providing new data—and a greater need than ever for insight on potential donors. The Foundation initially attempted to harness this opportunity with a product from another vendor, but it didn't deliver on the potential that the team knew existed. “We were using a less than ideal wealth screening tool, and we knew it wasn't working well for us,” said Executive Director for Healthcare Philanthropy Eli Jordfald. “We knew it was just giving us part of the story about patients. It didn't tell us whether someone was philanthropically inclined.”



Major Gifts from Grateful Patients and Families

73%

Increase in monetary value



Development directors met monthly with clinicians in their service lines to consider potential donors from their patients. But they were working from an overly broad list with unreliable, often outdated information, akin to looking for a needle in a very large haystack. “It was just unmanageable,” Jordfald explained. “There were simply too many patient names to realistically consider.”

Clinicians had little faith in the process at a time when the focus on fundraising needed to intensify as UNC Health Foundation sought to raise \$1 billion as part of The Campaign for Carolina, a broader initiative with the University of North Carolina at Chapel Hill Foundation to raise \$4.25 billion. The UNC Health Foundation’s development team needed a new solution to meet their ambitious goals for the capital campaign as well as annual giving. They needed to make their haystack smaller—much smaller.

The Solutions

After Jordfald heard the executive leader for Blackbaud Healthcare Solutions talk in fall of 2019 about the powerful capabilities of Blackbaud’s Patient Conversion Model—and the amplifying potential of combining that predictive model with Affluence Insight—UNC Health Foundation moved swiftly.

By July of the following year, the Foundation adopted and implemented these Blackbaud solutions for modeling and prospect research with the benefit of Blackbaud’s expert support and guidance. From the earliest conversations about UNC Health Foundation’s needs around grateful patient fundraising, the Foundation has had a trusted partner in Blackbaud.

Blackbaud’s Patient Conversion Model allows the Foundation to gauge a non-donor patient’s likelihood to donate to the Foundation in support of UNC Health and School of Medicine initiatives by using a custom-built model that includes the potential to screen new patients during the year. Blackbaud typically provides new patient updates to an organization using the model at least four times a year, yet the Foundation arranged for monthly updates from Blackbaud from the very start. “Timeliness in reaching out to patients who are grateful for their care is everything because the window of gratitude tends to decline very quickly,” Jordfald stressed.

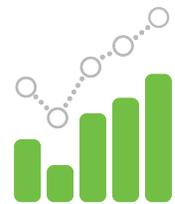
The model generates a simple score for each record, allowing development officers to focus their efforts on those patients most likely to respond, boosting levels of engagement and return on investment.

While Patient Conversion Model can be a game-changing solution for healthcare organizations on its own, Affluence Insight by Blackbaud Target Analytics® allows UNC Health Foundation’s development team to gain a more complete picture of prospects and uses data to sort donors into segments based on a combination of wealth, demographic, life stage, and



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Annual Giving

164%

Increase in responses

giving characteristics. This, in turn, helps the Foundation speak to and motivate each donor group with targeted communications. As Jordfald explained, when the Foundation sends a health equity appeal to those motivated by humanitarian concerns, “the message resonates perfectly with the donor’s interests.”

UNC Health Foundation drew on the combination of its Patient Conversion Model and Affluence Insight to maximize its efforts for the major gifts and annual giving campaigns. “Once we had the model, we were ready to put other tools in place,” Jordfald said. With this new approach, members of the development team became more strategic in who they sent mailings to and how often. They increased the frequency of appeals with confidence and tested the success of letters for service lines. Meanwhile, development officers could focus their efforts on the most promising leads. “We’ve become so much more data-driven, which in my opinion is the right direction,” Jordfald said.

Key Benefits



Impressive Fundraising Results

With the adoption of the Patient Conversion Model and Affluence Insight along with the increased frequency of targeted appeals, UNC Health Foundation soon realized a noticeable impact on fundraising results during the course of the fiscal year.

- The Foundation saw the total value of major gifts from grateful patients and families closed by the team increase by more than 73% in the first three quarters of FY21 when compared to the same period in FY20. That represents an increase of \$2.7 million over the previous year.
- The Foundation also saw the number of responses to its grateful patient/family appeals for annual giving increase 164% during the first three quarters of FY21 in comparison to FY20.
- The oncology service line also saw an impressive increase in responses to the service line’s appeals. In addition to using the Patient Conversion Model scores, they too increased the frequency of appeals and tested different types of letters with various target groups.



Increased Efficiency, Effectiveness

The Foundation now has a more streamlined process that provides intelligence for targeted messaging of distinct groups and more efficiently zeroes in on top prospects for the development team to reach out to individually.

Step by Step

See how UNC Health Foundation uses Blackbaud’s Patient Conversion Model in tandem with data analytics and its own metrics for major gift officers.

- 1 UNC Health Foundation deploys major gift officers to work with clinicians in specific disease areas and service lines. Once Blackbaud screens patient lists, the Patient Conversion Model enables the Foundation to assign the best prospects by service line to gift officers.
- 2 The Foundation has built a unique metrics system around these assignments that tracks gift officer activity on a number of data points, such as the number of patients reviewed with physicians, number of patients suggested/referred by physicians, and the number of those patients who were qualified, solicited, and eventually made gifts.
- 3 The monthly screened patient list also serves as a pipeline for the Foundation’s Top 30 Heat Map, where the very highest-rated patients are selected, assigned, and tracked, using an automated color scheme that corresponds to the type of action taken by the assigned gift officer. The Heat Map is tied to the Foundation’s donor database and allows the team to see in real time, precisely which patients have been discussed with clinicians and have been qualified.

Finally, the Foundation provides a one-stop hub for all of these grateful patient fundraising tools with personalized versions of these items so each major gift officer and supervisor can quickly reference progress toward goals.



“With Blackbaud solutions and our new data analytics tools, we are no longer making haphazard guesses, and we are using data analytics to our advantage. As a result, we are working a lot smarter, and we are working faster,” Jordfald said. “The time element to identifying someone to a qualification conversation has been shortened significantly. It’s just a much better, more efficient process that everyone is happy with.”



Clinician Champions More Engaged

Seeing the effectiveness and relevance of this new approach, clinicians who trust in data have become more engaged in fundraising efforts, knowing their time will be used well. “That really is a big plus of this model because physicians are trusting it, and it just has given them more confidence in the process,” Jordfald said. “It respects their time, and it aligns with their own assessments of patients very often.”

Future Outlook

As the Campaign for Carolina comes to a close, UNC Health Foundation’s development team feels confident about meeting or exceeding its \$1 billion goal while advancing its new analytics-driven approach to grateful patient fundraising. As the Foundation emerges from the pandemic, Jordfald said she anticipates even greater donor engagement by development officers with the intelligence provided by Blackbaud solutions and sees the potential to use the data in other ways that strengthen the organization’s grateful patient fundraising practices. “It builds the foundation for a wonderful tracking tool for development officer performance. We are measuring that better than ever before, thanks to these types of metrics that we could build into it.”

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Connect with us to make the most of your grateful patient and family fundraising. Email blackbaudhealthcare@blackbaud.com.

About Blackbaud

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