



INSIGHT  
PHILANTHROPY  
RESULTS

# EXPLORE

PD25

*New Depths*

August 19-22, 2025

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland



Sailing the Seas of Success:

# Chartering the Course with Prospect Research in Healthcare



While you're waiting, complete your  
session evaluations in the mobile app!

# Agenda:

1. Welcome & Introductions
2. Philanthropy as Healthcare's Lifeline
3. HIPAA and Ethical Considerations
4. Building Internal Partnerships
5. The Healthcare Donor Journey
6. Gratitude in Motion: Turning Care into Commitment
7. Strengthening Your Prospect Research Framework
8. Key Takeaways & Final Reflections
9. Q&A





# Welcome to Baltimore!

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# Our Starting Point

## Mercy Medical Center





# Our Starting Point

## Mercy Medical Center

- Downtown Baltimore anchor
- Independent. Mission-driven.
- Philanthropy = essential

## Sisters of Mercy

- Legacy of service
- Especially women, children, & the vulnerable

## 150 Years, One Block

- Founded in 1874
- Same block. Same mission.

## More Than a Hospital

- Community hubs, ambulatory sites, hospice, long-term care
- Independent, surrounded by large systems



# Anchors Aweigh: Philanthropy as Healthcare's Lifeboat

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# Why Philanthropy Matters in Healthcare

- **\$56.58 billion** given to health causes in 2023; up 8.7%<sup>1</sup>
- Margins shrinking, needs growing
- Small revenue percent, big difference
- Lifeboat for innovation and access
- Research aligns mission and generosity





# What Makes Healthcare Philanthropy Unique?

- Deeply personal, tied to moments of need
- Gratitude – episodic & emotional
- Timing varies across service lines
- Clinicians are trusted faces, not data sources
- High privacy & legal stakes



# Steering True: Navigating Ethical Waters

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# HIPAA at the Helm

- Health Insurance Portability & Accountability Act (HIPAA) governs use of Protected Health Information (PHI)
- HIPAA Final Rule (2013): Our Ethical Anchor



# HIPAA Final Rule (2013)



- Can use without authorization:
  - ✓ Demographic info  
(name, contact info, age, gender, date of birth)
  - ✓ Dates of care
  - ✓ Department of service
  - ✓ Treating physician
  - ✓ Outcome info  
(for exclusion only)
  - ✓ Insurance status
- Patients must be given **opt-out** option



# Key Ethical Considerations

- **HIPAA Compliance Is Essential**
  - Never store PHI in donor records
  - Understand the 2013 Final Rule permissions and limits
- **Respect Patient Privacy**
  - Never use diagnosis or treatment outcome
  - No sensitive health data without explicit consent
  - Only publicly available or voluntarily shared information

# Key Ethical Considerations (Part II)

- **Transparency Builds Trust**
  - Be clear about data use
  - Allow easy opt-outs
- **Ethical Data Use**
  - Avoid invasive data collection
  - Use clinicians as champions, not data sources



# Full Crew Ahead: Internal Partnerships that Power Philanthropy

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The logo for 'EXPLORE PD25 New Depths' is located in the bottom left corner. It features the word 'EXPLORE' in a large, bold, orange, serif font. Below it, 'PD25' is written in a smaller, white, sans-serif font. At the bottom, 'New Depths' is written in a stylized, orange, cursive font. A decorative, swirling green line is positioned between 'PD25' and 'New Depths'.



# Clinical Staff: Catalysts & Connectors

- First to hear & feel gratitude
- Offer proactive & reactive referrals
- Act as trusted connectors
- Offer program insights
- Each has unique approach...  
and that's okay!
- Treat clinicians like you treat donors





# Prospect Researchers: The Rudder, Steering Strategy

- Research 😊
- Leverage data
- HIPAA guardrails
- Ensure ethical fundraising
- Collaborate, don't just deliver



# Gratitude in Motion: Fueling Healthcare Impact

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# Navigating the Grateful Patient Pipeline

- Episodic nature – Emotional highs & lows
- Post-care = Peak engagement
  - Ongoing clinician approval VITAL
  - Seek clinician approval before contact for major gifts
- Varies among service area





# Storms & Swells: Emotional Timing of Gratitude

- Gratitude peaks after care
- Giving is emotional & time-sensitive
- Engage thoughtfully or wait
- Key moments can reignite emotion
  - e.g. – recovery milestones, tributes, anniversaries



# Charting the Course: The Donor Journey

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# Inclination

Why they would give

# Capacity

What they would give



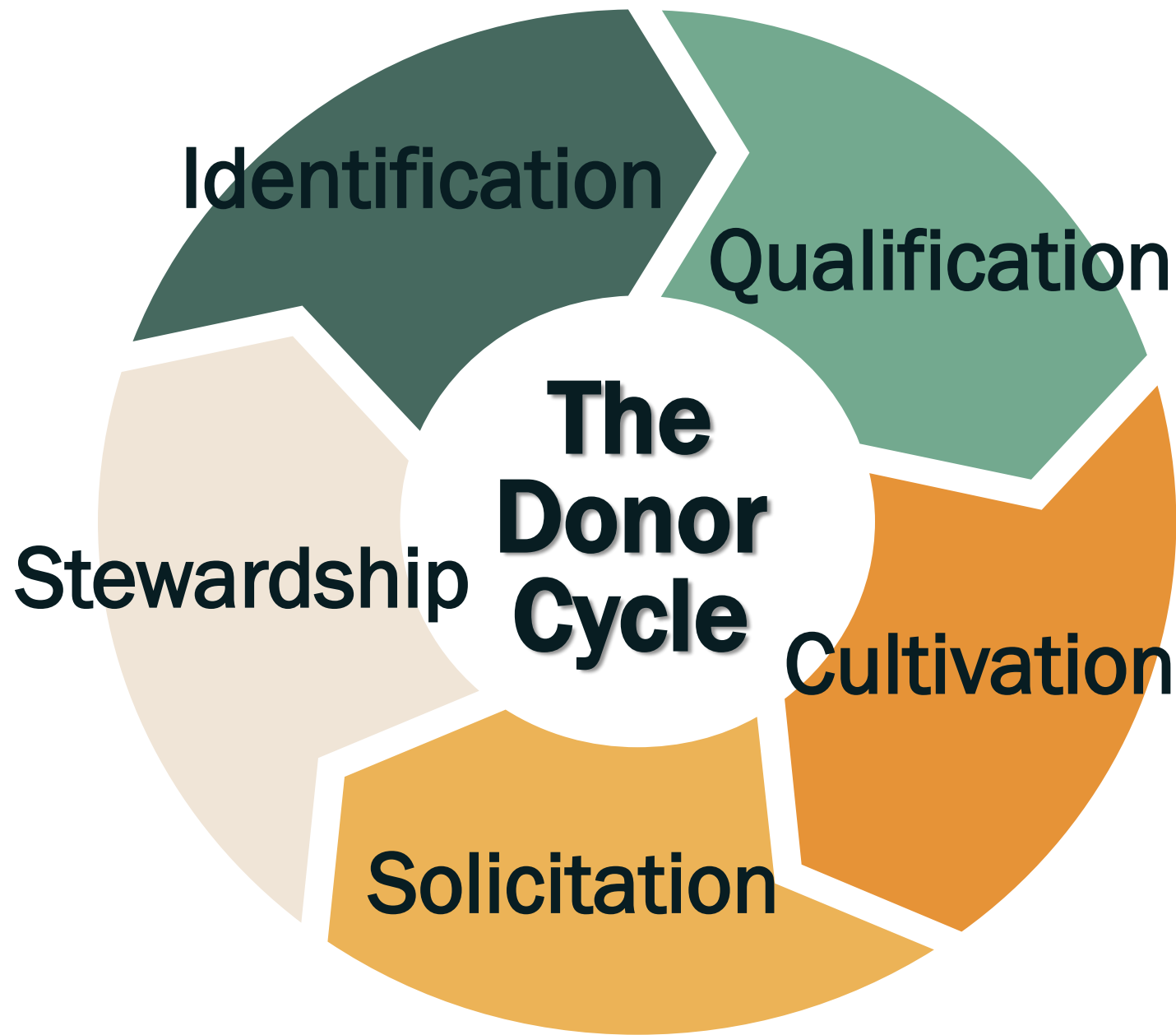


# Inclination **Ideal** Capacity

## **Prospect**

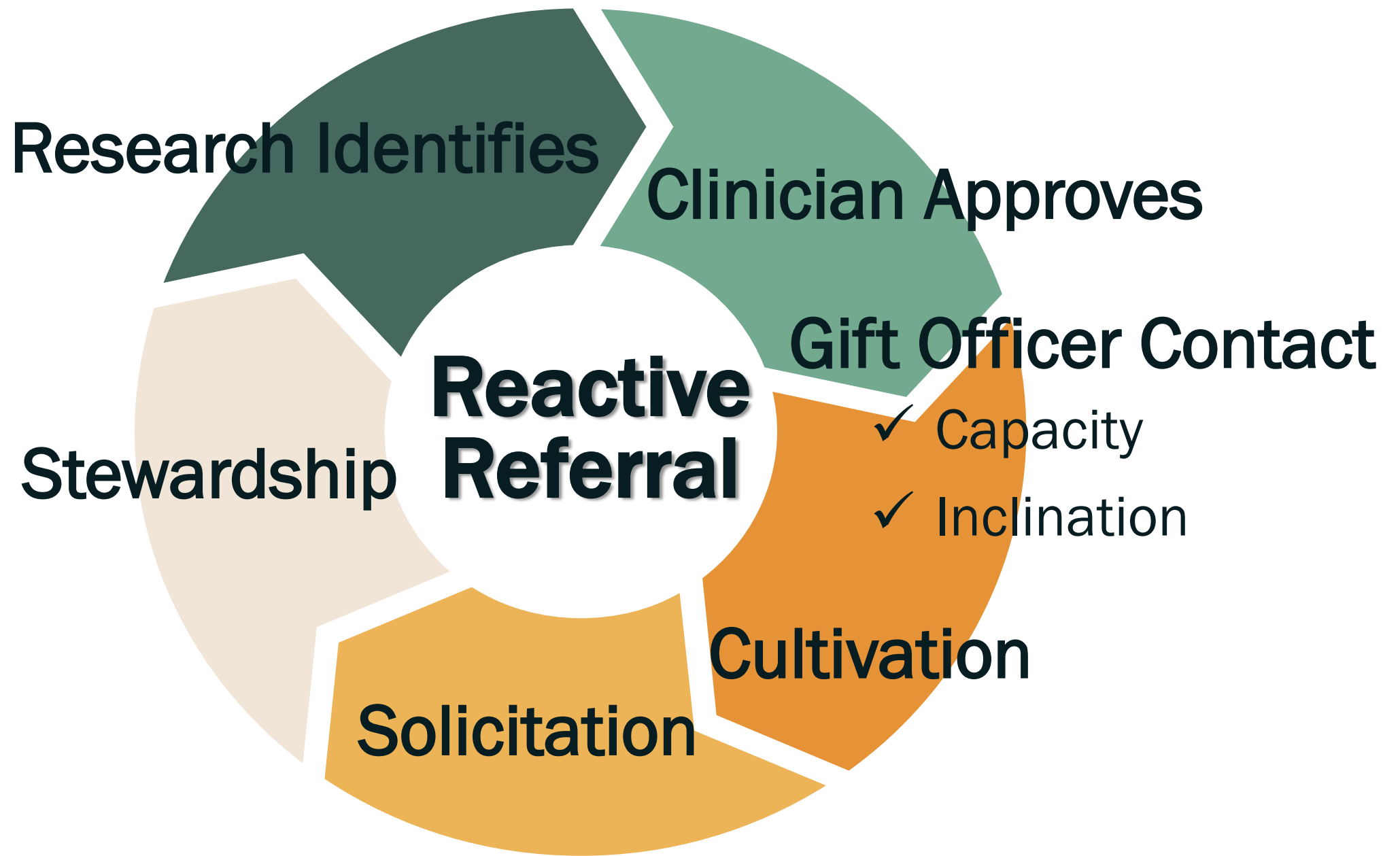
Why they would give

What they would give









# Shipshape Systems: Building a Strong Prospect Research Framework

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# Building a Strong Prospect Research Framework

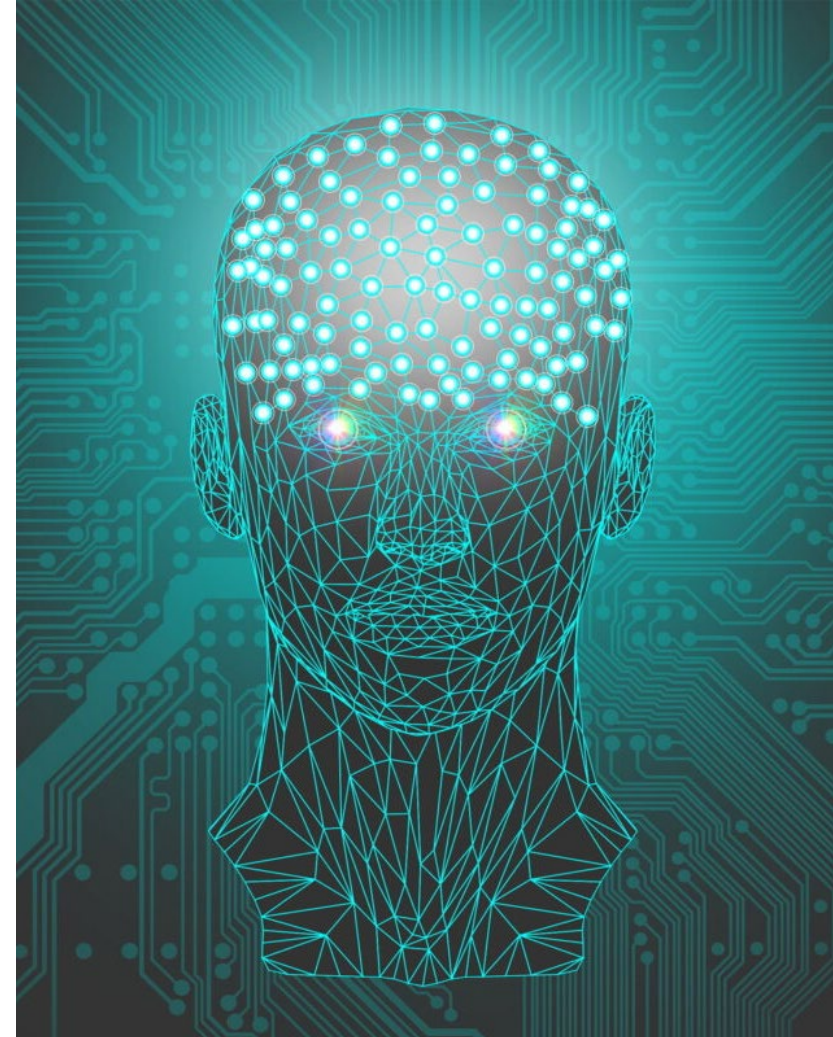
- Clean data is key!
- Wealth screening to assess potential
- Predictive analytics to guide outreach
- Engagement scoring for strategy alignment
- Stay HIPAA-compliant while tech-forward





# Yes, Even *We're* Talking About AI 😊

- You're already using AI — *surprise*
- Predictive modeling = AI in disguise
- Speeds up research & donor communication
- No PHI or confidential data ever
- Ethics still lead the way



# Plotting the Course: Key Takeaways & Next Steps

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# Key Takeaways

- HIPAA is your ethical anchor
- Relationships steer success
- Researchers = Collaborators & strategic partners  
Not just data engines
- Timing and trust are everything
- Stay transparent, stay human





# Docking at Port: Questions & Final Reflections

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# Closing/Q&A

- What resonated most with you today?
- Where do you see opportunities in in your shop?
- What might you *start, stop, or tweak* after this session?
- Let's share ideas, strategies, & lessons learned!





# THANK YOU!

Please complete your session  
evaluations in the mobile app.





# TIPS FOR AN ACCESSIBLE PRESENTATION

## 1. Use Slide Layouts

- Use the built-in slide layouts in PowerPoint. These templates are structured to work with assistive technologies like screen readers.

## 2. Add Descriptive Alt Text to Images

- Right-click on images, charts, and other visuals, select **Edit Alt Text**, and provide a concise description.
- If the image is decorative, mark it as such.

## 3. Ensure Sufficient Color Contrast

- Use high-contrast color combinations between text and background.
- Tools like the **Accessibility Checker** (under **Review > Check Accessibility**) in PowerPoint or online contrast checkers can help verify contrast ratios.

## 4. Use Meaningful Link Text

- Avoid vague text like "Click here" for hyperlinks. Instead, use descriptive text.

## 5. Structure Content Clearly

- Use headings and bullet points to organize content logically.
- Avoid long blocks of text.

## 6. Avoid Animations and Transitions

- Minimize the use of flashing animations, which can be distracting or trigger seizures.

## 7. Test with Assistive Technology

- If possible, test your presentation using screen readers or other assistive tools to ensure compatibility.

## Recommended Font Sizes

- **Titles/Headings:** At least **24–32 pt.**
- **Body Text:** At least **18 pt.**
- **Footnotes or Supplemental Text:**  
No smaller than **14 pt**, but avoid small text unless absolutely necessary.