



# Engaging physicians in transformational philanthropy

How building a culture of gratitude benefits patients, clinicians and your institution

**M**ore than ever before, philanthropy is a key funding source for health care institutions. We also know it is connected to optimally serving patients and communities. Perhaps because the revenue generated from philanthropic gifts is so

essential, many hospital leaders view philanthropy primarily as a financial tool or transaction; a donor writes a check and institutions have access to much-needed resources.

But from the grateful patient's perspective, philanthropy is not transactional—it's transformative. Research shows that tangibly

expressing thanks for the extraordinary care they or their loved ones received can be an important part of the healing process for patients and their families. Giving back can make them feel happier, increase their feelings of well-being and even help provide closure during a difficult period of their lives, such as when they are navigating a serious illness or have lost a loved one.

With this patient perspective in mind, MedStar Health—a 10-hospital health system based in Washington, D.C., and Maryland—has implemented a comprehensive Clinical Engagement in Philanthropy Program that recognizes the greatest growth

## Philanthropy as part of the healing process

Research supports the idea that giving can positively impact health and well-being. An article published by Harvard Health Publications says “expressing thanks may be one of the simplest ways to feel better.”<sup>2</sup> And expressing gratitude in tangible ways has been linked to an increased ability to cope with stress, a stronger immune function, quicker recovery from illness, lower blood pressure, increased feelings of connectedness that improve relationships and well-being, greater joy, optimism and increased generosity and compassion.<sup>3</sup>

MedStar’s Clinical Engagement Program, implemented through

about giving can be rewarding for them and their patients.

Some MedStar physicians have become passionate about effectively receiving and responding to thanks from patients and families. One of the strongest physician champions is Zayd Eldadah, M.D., a cardiologist at MedStar Washington Hospital Center. “Probably the most important lesson that I’ve learned is that philanthropy [can be] an integral part of the healing process, of the caregiving process,” he says. “Patients and families who want to give should never be dismissed; the answer, ‘Oh, don’t worry, this is just my job,’ is... actually off-putting in a way that’s hurtful. We might be thinking that we’re relieving patients of the burden of having to thank us, but in fact they want to thank us as a way of getting better.”

How might a physician conduct a conversation in a way that is respectful of the patient’s expression of gratitude? Here’s one example: A patient might say, “You’ve been so great, Dr. B. We really appreciate the wonderful care you gave to Mom. Please let us know if we can ever do anything to help you.” Dr. B. responds first by graciously and sincerely recognizing and accepting the gratitude: “Thank you. It was a privilege to care for your mother.” Next, Dr. B. acknowledges the important role donors play in the success of an institution: “Actually, we welcome your support and there are many ways you can get involved.” Finally, Dr. B. suggests a next step: “If you would be interested, I’d like to put you in touch with a colleague in our philanthropy office who can tell you about some of the ways you can make a difference.”

Other patients may express their gratitude without directly asking how they might help. In these cases, the physician is asked to refer the name of

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comes from major gifts. And most major gifts come from grateful patients and their families.

The program has demonstrated to MedStar’s clinicians that a donor’s gratitude is a direct response to the clinical care and exceptional experience they have had during their health care encounter.<sup>1</sup> And hospital leaders, especially physicians, are learning to think differently about why individuals make philanthropic investments. Through this partnership, physicians have become more comfortable identifying and interacting with grateful patients who want to make a difference.

a partnership with health care philanthropy consulting firm Gobel Group, uses this knowledge about the benefits of giving by educating hospital employees about patients’ perspectives on philanthropy and helping physicians understand their role in the philanthropy process. It delivers regular hospital-wide training and focused sessions for physicians who choose to participate more directly by engaging with and referring grateful patients. These physicians are then encouraged to share their experiences with their colleagues, discussing how conversations

the grateful patient to the philanthropy officer and together they will strategize the best approach. Later in this article, we will discuss some ways physicians might refer these patients and reach out to them.

## Encouraging a culture of gratitude

As a result of this work, leaders at MedStar no longer talk about creating a culture of philanthropy; they talk about creating a culture of gratitude. Hearing positive patient stories has the capacity to heal,<sup>4</sup> and philanthropy leaders usually have a robust catalogue of these stories. Sharing them organization-wide reinforces a health care institution's core values and helps everyone feel more appreciated. When physicians, nurses and staff are on the receiving end of gratitude, they become more grateful, generous, compassionate

and empathetic in return—which helps them feel more engaged with patients and other members of the care team. Listening to grateful patients' stories also can remind health care professionals of why they were attracted to helping others in the first place and how much their compassionate care means to patients.

An excellent way to share stories is to create short video vignettes of patients, doctors and nurses talking about the healing power of philanthropy. At MedStar, health system leadership helped identify subjects for video interviews. We now have a library of more than 100 compelling stories to use in orientations and training, as well as on our website and television networks. You can view some of these videos at <http://gobelgroup.com/resource-library/videos>.

To further promote a cultural

shift and align the vision of our health system and philanthropy team, MedStar's fiscal year 2014 plan includes these two goals: To educate 500 new individuals via in-house training and encourage them to think differently about philanthropy, and to engage 300 clinicians and other employees to act differently by referring patients who are grateful and introducing the philanthropy team to those individuals. A percentage of MedStar's senior leadership team's bonus is tied to our success in achieving these goals.

## Engaging physicians

Helping physicians recognize that philanthropy is a part of the clinical process and can be connected to a patient's healing is critically important. However, this new perspective may not drive change that results in them referring patient

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prospects. To best accomplish this goal, MedStar uses a four-step process developed by Gobel to identify, recruit and engage philanthropy champions.

### STEP ONE: Identifying philanthropy champions

The process begins with the philanthropy office creating a list of prospective physician champions with the following characteristics:

- Physicians with a wealthy panel of patients.
- Physicians who work in key service lines or centers of distinction.
- Physicians who already are active partners with the administration—serving on key hospital committees, participating in special events and donating to the organization.
- Physicians identified by senior leaders as having a high level of emotional intelligence and receiving high patient satisfaction scores.
- Physicians who are employees and those who are not. Those employed by the health system generally are more receptive to partnering, but physicians who are not employed should also be given equal consideration.

We have found that it's optimal to have 10 physicians working with each philanthropy officer. After developing a list of prospective champions, an institution should review it with the chief executive officer, chief operating officer, chief medical officer, chief nursing officer and other senior leaders. Engaging senior leadership in vetting champion prospects gives them ownership in the program.

### STEP TWO: Recruiting philanthropy champions

After involving your organization's senior leadership in the identification process, it is vital to seek their help in recruitment as well. Members of MedStar's senior leadership contacted prospective physician champions directly to ask for their help. We advise language similar to the following:

"Hi, Dr. Smith. I'm leading a new initiative to expand and diversify our revenue model, and we've identified philanthropy as a significant and untapped opportunity for growth. We know our patients are grateful for the care and compassion that medical staff leaders like you are providing. I

asked my senior leadership team to help me identify a few physicians who could help us conceptualize a new program that makes it easy for patients who want to give back to contribute to your program and others in our hospital. I also asked them to identify physicians who are leaders of our institution, who are already delivering exceptional patient experiences and who are citizens of the institution. You were one of the physicians they identified. Would you join our team to help us build this program?"

### STEP THREE: Training philanthropy champions

Engaging with physicians and nurses encourages them to view philanthropy as a natural extension of the excellent clinical experience they provide. They are not asked to solicit their patients, just to acknowledge and accept a patient's gratitude and refer them to philanthropy staff when the patient wants to give back.

### STEP FOUR: Streamlining the process

To not just change the way physicians think but to actually



change behavior, you must operationalize a process that makes it simple and efficient for them to partner with philanthropy staff.

This process involves easy-to-access systems and, when possible, technological tools for grateful patient referrals. Examples of tools philanthropy offices can use to streamline the process include:

- Smartphone apps for referral of patient names.
- Customized letters, emails and phone and in-person scripts for physicians to use when introducing philanthropy officers to grateful patients.
- Built-in referral button inside electronic medical records.
- Written and video “cases for support” that describe physician champions and the valuable programs they support.
- Philanthropy officer referral cards and posters.
- Database management systems to capture, track and share relevant referral information.
- IT solutions to manage the flow of patient data from the hospital to a wealth screening provider and back to the philanthropy department, segmented and coded for quick use.

Some physicians may choose to remain involved in the philanthropy process after they make a patient referral. For example, physicians may send personal thank you letters to donors they refer or those who have contributed to a particular program; invite donors to lectures or facility tours; or send progress reports to update donors on developments in areas they support.


## Positive results

Identifying, recruiting, training and streamlining a physician’s engagement with the philanthropy program will dramatically expand your prospect list. A hospital will

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most likely see an average of four new patient names identified each month from each active physician champion after six to 12 months of implementation. This means more prospect visits, more asks and more and larger gifts. An additional part of the program provides specialized training to philanthropy officers on best practices for partnering with physician champions and maintaining successful and productive relationships for continued referral success.

Philanthropy is about unlocking the power of gratitude to help patients heal. When patients are grateful for the care they have received, they are motivated to give. When they invest through philanthropy and express their gratitude, they are happier.

Ultimately, an integrated grateful patient philanthropy program creates a culture that values gratitude and appreciation—which results in exceptional feelings of connectedness in your hospital community and also more revenue from philanthropy. With additional revenue, institutions can better support the people, programs, facilities and technology they need. So, to help your organization thrive, focus on helping clinicians think differently about engaging more meaningfully in a grateful patient philanthropy program. 

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grateful patient philanthropy programs that result in more and larger major gifts. With more than 20 years of experience in health care philanthropy, he previously served as associate chairman of development at The Cleveland Clinic and chief development officer at the University of Rochester Medical Center.