

Merging 11 databases for more effective fundraising



Streamlining Databases for a Prominent Health System

“The Heller team understands that while you can make a database do what you want, the hard part is managing the human factors.”

Challenges

- Development programs in each of the health system’s medical centers worked independently of the primary clinic and each other, creating competition for the same donors.
- Their system was not taking advantage of efficiencies of using combined resources for activities like prospect research and planned giving programs.
- Development staffers recognized the need to avoid disparate data and processes by combining their 11 separate databases into one.

Solution

- Team Heller conducted a thorough needs analysis to learn about concerns and goals, analyzed the databases, and mapped out a clear, affordable plan.
- The team worked with the health system’s database administrator to map the 11 databases — each with different coding structures — into one system, structured so that it could eventually be merged with the health system’s donor database.
- “Team Heller helped us navigate the concerns that development officers often have about mixing their data,” said the Director of Development Programs. “They do it in a way that allows people to express their differences and still come to a solution.”

Results

- **Increased efficiency** — The main database administrator can now run reports for individual medical centers, freeing development staff time.
- **More effective fundraising** — The system no longer competes over shared donors, dual development officer assignments are minimized, and officers are closing more gifts.
- **Improved performance** — The consolidated database paved the way for processes that manage and track development office performance.