

# On the road with your DONOR database

## Driving new technology for your gift officers

In health care philanthropy, we often look for ways to use new technologies to enhance our donors' experiences. For example, we provide user-friendly mobile functionality on our websites so donors can more easily learn about our institutions and support our initiatives.

Recently our foundation at Children's Hospital of Philadelphia (CHOP) realized that we needed to devote similar time and thought to the technology tools and abilities that we were providing to our development team. Our gift officers were dealing with systems that were inconvenient and limiting, especially when they were on the road meeting with donors or community partners. For instance, they couldn't access donor records or enter contact reports when they were away from their desks. We wanted to give them new resources, so they could do their jobs more easily and efficiently.

It was time to take our donor database mobile. Making that happen involved much

research and the contributions of multiple stakeholders, including an independent contractor and our CHOP information technology (IT) team experts. Most important was the enthusiasm and support of internal champions from various areas of our institution. The process culminated in deploying new mobile device functionality over three months beginning in spring 2017. (This is the first phase of a larger upgrade to span the next few years.)

In this article, we'll discuss our new tools, the team we assembled, our development and implementation processes and what we've learned. By planning carefully, communicating frequently and





relying on the invaluable contributions of our team and stakeholders, we were able to meet the needs of our gift officers as well as plan for better processes moving forward.

### **Background for the project**

We began investigating options for updates in 2015, with two objectives: to provide tools that met the needs of our gift officers in a modern, mobile workforce and also to learn what functionality would be important for growth. On the back end, our foundation was robust and well functioning. We have used Raiser's Edge (RE) as our constituent relationship management (CRM) tool since 2005. RE houses gift history going back to 1979,

with over 2.3 million gifts recorded, almost 800,000 constituent records and a quarter of a million documents about those gifts and donors attached through PaperSave. Over the years, we have built processes to record, import and integrate large amounts of data, much of it now housed in a data warehouse we built with internal resources. Our team has also created complex reports with SQL and QlikView, and nightly data flows to the warehouse and RE from 15 different external sources.

### **Our planning process**

We initially took a three-pronged approach to explore possible options. First, we conducted interviews with the



## Examples of user stories

I want to...	So that...	Category
Add new memberships and end others that are terming for giving societies. For these organizations, we track: <ul style="list-style-type: none"> <li>• Their role, including if they are a chair or a member.</li> <li>• The start and end date of their membership.</li> </ul>	This information is accurate and available to other users to view. This membership is also critical for reporting on the donor's past and present involvement in the organization.	Giving Societies
Track when a CHOP employee's payroll deduction donation to the CHOP foundation is ending.	I can effectively track/remind CHOP employees to continue their support of the foundation via payroll deductions.	Gifts
Create a giving society event specifying: location, date, start/end time, who is eligible for event, RSVP list and foundation contact.	I can understand which donors are engaged in their giving societies.	Third-Party App/ Campaigns

entire foundation workforce. In general, our major gifts officers, as well as retail cause marketing, events, concierge services and campaign operations staff, all were hoping for a more mobile-focused, user-friendly front end. Our operations and services staff, including prospect development, gift administration, reporting and analytics, and donor relations appreciated the complex data entry capture that RE afforded.

In addition, we conducted benchmarking studies with peer children's hospitals in the Woodmark Group, the Association of Advancement Services Professionals and other organizations. And we also

researched creative solutions by attending conferences, viewing demos, etc.

We knew we didn't want to invest the budget and time to do a full CRM conversion—among other factors, we were in the midst of a 10-year, \$1 billion campaign—so we ultimately decided to put a mobile and user-friendly tool on top of RE. Some of our contacts had successfully deployed something similar: One used Tableau, a data visualization tool, as the front end on top of their old database, and another used a customized version of Salesforce on top of Banner.

Our chosen solution utilized Salesforce's Nonprofit Success Pack

along with RE, keeping the best of both worlds for our fundraising and operations staff. Salesforce provided a flexible solution with the new functionality we wanted, allowing our development team to roll out the new application in phases as we learned more about our needs over time.

### User stories instrumental

Through a request for proposal process, we identified an implementation partner, Accenture, which conducted interviews with our staff to determine processes and needs. At the end of two weeks, we had 177 "user stories" in a detailed spreadsheet, broken out by teams



and functionality. For examples of user stories, see the table.

These stories served three purposes:

- Our stakeholders felt that their input was taken into account during the decision-making process.
- We got to know and feel comfortable with the Accenture team.
- The user stories document served as a checkpoint for implementation, as we could refer to the user stories to remind ourselves of the needs we were addressing.

“The user story process helped me gain clarity around how we would use the software,” said Julia Wicoff, director of retail cause marketing and children’s miracle network.

The Accenture team also provided information about Salesforce and its functions that helped us make important decisions. For instance, we realized we didn’t want to customize our product to the point that when Salesforce updates were issued, we’d have to do major reworking of our functionality. We made changes such as adding columns or fields, but nothing that altered major processes.

### Select your champions; use their time wisely

No one knows the business of fundraising better than fundraisers. We recruited seven program directors from areas such as development services, major gifts, corporate foundation relations, donor relations, concierge services, children’s miracle network/cause marketing and campaign operations to be top-line champions for this project. “Involving the program champions from the beginning was

## CHOP’s new mobile functionality, phase 1

Our new functionality includes:

### Mobile capability that improves user experience

- Simplified page layouts.
- Mapping functionality.

### Improved contact management

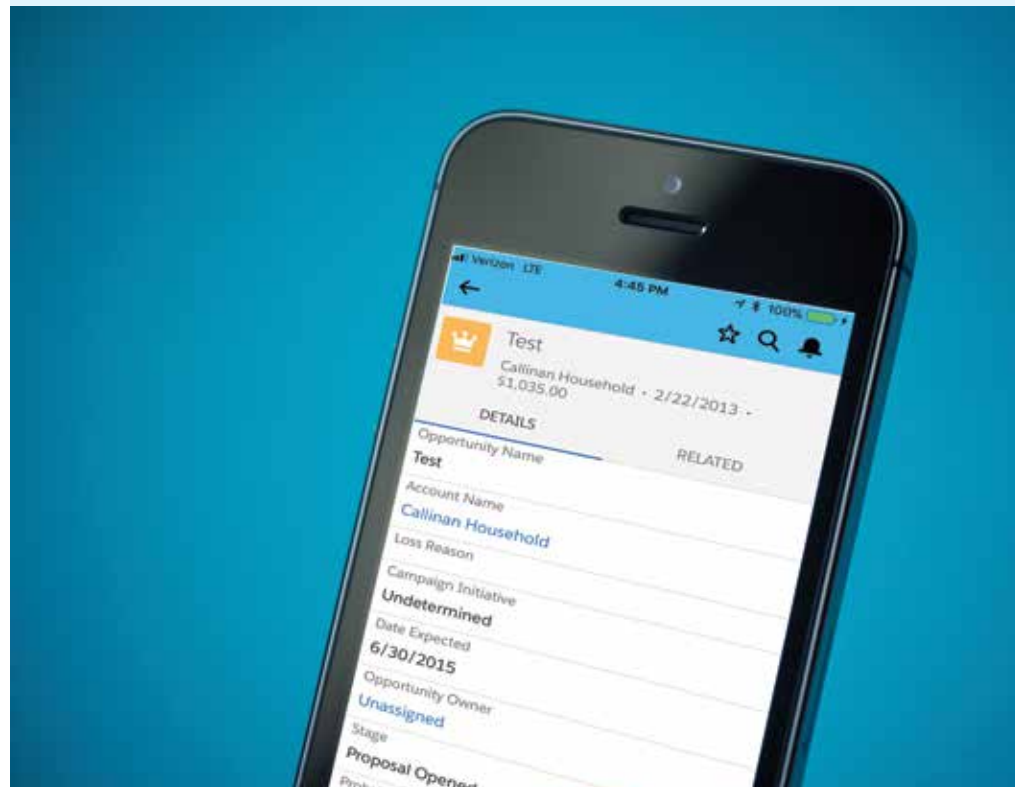
- Frontline staff can update donor information as they receive it.
- Configurable data fields allow users to capture cleaner data.

### Activity management

- Actions can be entered easily on a user’s phone in real time.
- Users can easily view and update open activities and future events.

### User and opportunity management

- Users can highlight opportunity stage progression.
- Managers can easily track their team’s performance with dashboards.



## Phase 1 project timeline and major tasks

Our 12-week deployment consisted of three overlapping phases.



### ● Weeks 1–8

- Identified requirements and functionality.



### ● Weeks 2-10

- Designed, built and tested new functionality.



### ● Weeks 8-12

- Developed training materials.
- Communicated with users about implementation process.
- Users tested and learned new functionality.

key,” said Tara McCartney, project lead. “This forum sparked ideas and creative solutions for new and improved workflows.”

Also on our team were four dedicated developers and one trainer from our development technical services team, as well as a few resource people from CHOP’s IT department. And a number of staff volunteered to participate, testing functionality and providing feedback.

We were very conscious that we were asking busy people to devote time to this project. We made sure to keep everyone apprised of our schedule and progress, and targeted our requests for input on various functions to those most directly impacted. McCartney noted, “Our weekly technical and program champion meetings were targeted and focused on answering questions that could hinder accomplishing the specific project goals for that particular week.”

Once we made the decision to use Salesforce, we also embarked on a communications campaign about the project and the product targeted to our entire staff. We used email, all-staff meetings and our internal newsletter to share updates.

### **New functionality and deployment**

From the user stories as well as input from our team and staff, we decided to initially focus our new functionality around several areas: our mobile capacity, contact management and activities functions, and user and opportunity management. See the sidebar on CHOP’s new mobile functionality, phase 1, for more details.

As part of our engagement with Accenture, we agreed to an aggressive but realistic 12-week

timeframe for phase 1 (see the sidebar on project timeline and major tasks). For this phase, we decided to focus on tools that would primarily be used by our major gifts, corporate and foundation relations, cause marketing and campaign operations staffs. Weeklong sprints condensed our timetable, and overnight coding by offshore programmers meant that a change suggested one day could be ready for testing the next. This kept our momentum going.

Said McCartney, “We were able to deliver phase 1 so quickly because we kept the scope contained. This ongoing project gives us the ability to roll out new phases when we are ready based on user feedback and program priorities.” Programs like gift planning, concierge services and donor relations can use the new phase 1 functionality, and, from their observations, staff can suggest enhancements they would like to see in the future. Tracking good new ideas for later implementation kept staff satisfaction high; they could tick off items in their user stories and, at the same time, see the growing lists for phases 2 and beyond. For more details about future plans, see the sidebar on “upcoming phases.”

### **Our new tool: Donorforce**

Our phase 1 go-live was July 2017. Staff can now use our version of Salesforce, which we call Donorforce, when they are on the road. We are still building, testing and tweaking functionality as necessary; staff is currently testing mapping tools for a near-term implementation.

Robyn Lorfink, senior associate director of campaign operations, said, “Donorforce is easy to use and navigate. Wherever you’re doing



## Intelligence for

grateful patients

new consumers

**connected healthcare**

healthy communities

breakthrough care

population health

engaged patients

meaningful outreach

lasting impact

better outcomes



## The Only Comprehensive Intelligence for Good™

There's artificial intelligence, and then there's *comprehensive* intelligence optimized for social good organizations from Blackbaud. No one else brings together the right data, analytics, expertise, and artificial intelligence the way we do—all so your healthcare institution can thrive.

[blackbaud.com/intelligenceforgood](http://blackbaud.com/intelligenceforgood)

Big Data + SKY Analytics™ + Social Good Scientists™ + SKY AI™

## Upcoming phases of CHOP's mobile technology project

Future phases of our project and the areas we will address include:

### Winter/Summer 2018

*Third-party applications*

- Mapping.
- Outlook integration.
- Document management.
- RSVP software.
- Online donation forms.

### FY19

*Development enhancements*

- Planned giving (based on user stories already collected).
- Donor relations (based on user stories already collected).
- Tribute enhancements.
- Giving societies enhancements.
- Naming recognitions enhancements.
- Expand Code of Federal Regulations enhancements (grants).

### Future (date TBD)

*Events*

your job, it allows you to keep current without having data entry pile up for office days. I look forward to the future phases as well as the discussions this has opened up.”

Ultimately, we've been able to streamline our processes and think differently about how we operate without investing the years and dollars that would have been required for an entire CRM conversion. And we believe this project has strengthened the relationship between advancement services and frontline fundraisers at CHOP, which is a big bonus as we move forward together. As Wicoff said, “The process was a great

exercise in breaking out of the ‘this is how it's always been’ [mindset] to think about how it could be. It also gave me incredible insight into the day-to-day activities and needs of my colleagues.” <sup>AMP</sup>



**Mary Ehart, M.A.**, is assistant vice president of development services at the Children's Hospital of Philadelphia foundation. She has worked in technology and philanthropy in many nonprofit settings, including social services, arts and culture, education and health care. In addition to overseeing a number of programs at CHOP, she focuses on best practices for reporting and data management.

## SPONSOR SHOWCASE



### Blackbaud Healthcare Solutions: Connected Insights for Your Healthcare Organization

Blackbaud Healthcare Solutions enables healthcare organizations to reach new consumers and connect individuals along the new healthcare continuum—consumer to patient to constituent—through world-class cloud software, services, unmatched data intelligence and expertise.

Blackbaud has served healthcare foundations for over 35 years. While we continue to work with healthcare philanthropic organizations through our offerings of RE NXT, Analytics, Luminate, OLX, Attentive.ly, TeamRaiser, Everyday Hero and professional services, we also work with FQHCs (Federally Qualified Healthcare Centers), community health centers, through our FE NXT and professional services solutions.

New in 2017, Blackbaud Healthcare Solutions is now expanding our world class analytics by providing collective intelligence designed to give hospitals access to the right consumers, patients and constituents. By now serving entire healthcare systems, Blackbaud Healthcare Solutions provides solutions that increase revenue, decrease debt and grow philanthropic support through the entire health system's consumer lifecycle (consumers, patients, constituents). Our solutions impact both operational and philanthropic revenue allowing hospitals and their foundations, community centers and other healthcare organizations to focus on mission delivery while improving their bottom lines.

**blackbaud**<sup>™</sup>  
▶ power your passion