

Healthcare Charities

Integrating Wealth Data Gives Their Fundraising a Boost

Since 1983, Healthcare Charities has been serving the people of rural central, eastern and northern Maine by supporting the philanthropic efforts of the Eastern Maine Healthcare System (EMHS). With a guiding tenet that philanthropy has a way of bringing people together working for a common goal and realizing amazing success, Healthcare Charities works with its local community to garner support for its hospitals and other member organizations to keep them on the cutting edge of technology. Thoughtful gifts of all sizes make possible the equipment and research that EMHS doctors and scientists need to make the important discoveries today that will help build a healthier tomorrow.

Healthcare Charities has traditionally had a sizable number of donors and prospects; in fact, their database holds almost 200,000 records across more than a dozen affiliate hospitals, programs and healthcare organizations. For the past few years, their management team had been looking for ways to build a segmented and targeted approach to fundraising. In late 2010 they decided to consider screening batches of records in order to identify and target their top prospects and inform their fundraising strategy. In February 2011, they selected WealthEngine, Inc.™ and engaged its research and screening services, with the following goals:

- » Screen recent donors and determine a cultivation plan
- » Integrate the screened data into their donor management system
- » Use data mining to compare major donor files with patient records to target grateful patients

Screening Donors for Effective Cultivation

Healthcare Charities started by screening 21,000 records across seven affiliate hospitals and healthcare organizations to get a feel for who is giving, discover what their wealth profile is, and determine if there is room for additional solicitations. This allows the respective development teams to focus on their top prospects and cultivate relationships for additional gifts.



"We are able to provide our affiliate organizations and hospitals with immediate and direct access to quality, actionable data, thanks to the screening data we integrated from WealthEngine."

- Marianne Grifasi-Miller, Senior Information Systems Technologist, Healthcare Charities

"Our data is separated for each of our affiliates, and while each does their own fundraising, they rely on Healthcare Charities for guidance, support functions, and for managing their gift processing," explains Marianne Grifasi-Miller, Senior Information Systems Technologist at Healthcare Charities of Bangor, Maine. They have found the screened data to be invaluable in planning direct-mail programs, the first two of which are set to launch this Summer.

Integrating Wealth Data for Better Fundraising Results

Determining the Desired Level of Integration - Healthcare Charities uses The Raiser's Edge® from Blackbaud® for fundraising and for managing their donor information. Using a mass import approach they looked at the available fields and prioritized which fields they would add to the system based on the criteria provided by the fundraising teams within their affiliate hospitals and organizations.

"While some of our affiliates wanted every bit of information in there, we couldn't put it all in. We had to prioritize. By working with my WealthEngine client services manager and being able to seek advice from her, I used WealthEngine's core tables as a starting point and then determined what fields were necessary to include," explains Grifasi-Miller.

Validating Data - Before importing into the live environment, the fundraising teams conducted spot checks to validate the data. Fortunately, no major discrepancies were found, in large part because the team had first confirmed the accuracy of data already in the system, including contact information, checking for duplicate entries, and standardizing gift tracking.

Benefits Realized - The team has found the wealth data invaluable in analyzing past donor attributes and compiling targets for direct-mailings. They look at charitable giving history, stock holdings and pensions, real estate holdings, hard assets, and propensity to give scores and gift capacity ranges.

"With all of the information in one place, our gift officers can quickly understand the donor or prospect and determine how to best approach that individual," explains Grifasi-Miller.



Having the data available to the affiliates from directly within Blackbaud's The Raiser's Edge DMS brings benefits to both Healthcare Charities and their affiliates. "Using WealthEngine data within our Raiser's Edge platform has allowed us to step up our fundraising and has raised the profile of Healthcare Charities among our affiliate hospitals and organizations," explains Marianne Grifasi-Miller, Senior Information Systems Technologist at Healthcare Charities.

For their affiliates, the integration of wealth data has enabled the development teams to be more proactive in their fundraising. "Our fundraising teams can get a complete view of our donors and follow up in a more timely fashion so no opportunity is ever missed," continues Grifasi-Miller.

Next Steps - Since the initial integration was completed in February and Healthcare Charities has had the opportunity to work with the information, they have added some fields that were not included in the initial mass import.

Data Mining

Moving forward, Grifasi-Miller's plans to conduct a data mining exercise with WealthEngine to analyze their major donors, so that this data can be cross-referenced against patient data that is stored in a separate system. Essentially, their hospitals will be able to screen patients on a daily, weekly or monthly basis and cross-reference the results against the major donor file, allowing them to spot those who have previously donated and, with some special attention, may give again.

Using this analysis, the gift officers can cultivate relationships that have potential for major gifts and develop a grateful patient program by targeting individuals for repeat donations based on their estimated giving capacity and propensity to give scores. "We are very excited to do this data mining exercise, as it will allow our affiliates to design a grateful patient program and ultimately better coordinate and time their fundraising ask with the patient's visit or interaction with the hospital," explains Grifasi-Miller.

Critical Support, Every Step of the Way

Having detailed and accurate wealth data integrated into their donor management system gives Healthcare Charities a boost in the work they do with their affiliates. "We are able to provide our affiliate organizations and hospitals with immediate and direct access to quality, actionable data, thanks to the screening data we integrated from WealthEngine."

Their satisfaction in having selected WealthEngine is evident. As Grifasi-Miller explains, "WealthEngine staff has been extremely knowledgeable and helpful. We have had a great experience working with their team. Everyone has been quick to respond, eager to help and willing to go the extra mile. It's been a pleasure to work with fundraising professionals that are dedicated to serving me and my organization."



Goal: Screen recent donors and determine a cultivation plan

Tactics:

- ⚙ Screened 21,000 records across seven affiliate hospitals and healthcare organizations
- ⚙ Assessed wealth profile of donors and prospects
- ⚙ Determined opportunities for more solicitations

Goal: Integrate screened data into their DMS

Tactics:

- ⚙ Analyzed past donor attributes and compiled targets for direct-mailings
- ⚙ Raised their profile among affiliate hospitals and organizations
- ⚙ Enabled affiliates to be more proactive in their fundraising by having a complete view of their donors

Goal: Data mining to compare major donor files with patient records

Tactics (In Progress):

- ⚙ Target individuals for repeat donations, using wealth and affinity indicators
- ⚙ Cultivate relationships that have potential for major gifts
- ⚙ Develop a grateful patient program