

Baylor College of Medicine Cuts Reporting Time in Half and Gains New Donations

omatic
SOFTWARE

“The donors were so pleased when the Development Officers delivered the reports that a few of them actually wrote additional checks right then and there!”

—Amy Armstrong,
Senior Director of
Philanthropic Operations,
Baylor College of Medicine

THE CHALLENGE

The team at Baylor College of Medicine needed to collect a variety of data points stored in separate databases to create end-of-the-year endowment reports for their donors. A process that involved printing and hand-collating the information was taking four to six months to complete.

THE SOLUTION

ImportOmatic allowed all the data from each of the data sources to be imported into Raiser's Edge, where it could then be exported into an Excel sheet and accessed directly via InDesign.

THE RESULTS

The report creation time was cut in half to only two months. The new reports were so well received that several donors wrote additional checks when they were delivered.



Baylor College of Medicine, a health sciences university with a leading clinical research program, funds much of its research through endowments. Donors are excited to contribute to groundbreaking research initiatives that often result in new diagnostic tools and treatments, and they look forward to learning what their individual contributions have accomplished in the end-of-the-year reports.

Because the research program is so extensive, the university has a large amount of data to compile in order to create the reports that are so important to donors. The Philanthropic Operations team had been spending up to six months to gather data from disparate sources and create the reports—meaning that the reports weren't getting delivered until springtime of the following year. The team realized they needed to find a way to be more efficient. They had to deliver these vital reports, which the university relies on to drive annual giving, faster.

THE CHALLENGE

Baylor College of Medicine's endowment reports are created from different data points that are stored in separate databases. Financials are drawn from Accounting, scholarships are drawn from Admissions, donor information is drawn from Raiser's Edge, and the researcher's

narratives were, before they began using their new process, coming from email threads. The Philanthropic Operations team members were printing and hand-collating these documents to match up the data for each endowment.

In 2014, the team started using a Blackbaud NetCommunity form to gather the narratives from the researchers, replacing the cumbersome email process. The system allowed the team to have a historical record of the narratives and to remind researchers what they'd submitted the previous year. While this form took care of one time-consuming process, the team members still needed to merge the researchers' narratives with financial, scholarship, and donor data. This hand-collating process was responsible for the bulk of the extensive timeframe. The team needed to streamline the process in order to deliver the reports in a more timely manner, keeping donors interested and motivated to continue giving.

THE SOLUTION

When Amy Armstrong joined Baylor College of Medicine as the Senior Director of Philanthropic Operations, she challenged the team to get creative and approach the annual report process with fresh eyes. Amy says, "The team made it their mission not only to get more efficient, but also to raise the bar on what they were producing—to really make the reports something that the donors would love and respond to."

The team had been using Omatic Software's integration tool, ImportOmatic, to bring donor information into Raiser's Edge for two years, and they were confident they could use ImportOmatic in additional ways to increase efficiency. They consulted Omatic for guidance on how to import the data from each of the separate databases into Raiser's Edge. Omatic helped the team set up a system that moved the required data into each endowment record in Raiser's Edge. The team could then easily mail merge the data into the InDesign document that the graphic designer used to create the end-of-the-year reports.

THE RESULTS

Using ImportOmatic, the team was able to reduce time spent on the reports by over half. Now the process, from start to finish, takes only two months—and this timeframe includes graphic design, which they previously weren't able to dedicate time to. The Development Officers were (and are!) proud to hand deliver the reports because the documents are on time, look attractive, and are very engaging. Amy shares, "The donors were so pleased when the Development Officers delivered the reports that a few of them actually wrote additional checks right then and there!"

With this success, the team began using a similar system for their scholarship thank you letters. Previously, a team member would email each recipient to ask for the text that would be used in the letters. Recipients would email back, and then the team members had to sort through individual emails to collect all the text for the letters. The team began using a NetCommunity template to collect the thank you note text from the recipients and then used ImportOmatic to import the text into Raiser's Edge. The response rate for the thank you notes is now 100% as well.

Amy says, "When people tell me they're having problems like we were, I ask them, 'Do you know Omatic?' When they say 'no,' I say, 'Oh, you need to know Omatic!' I recommend the team at Omatic to everyone."