



# SAN FRANCISCO FOUNDATION CUSTOMER SUCCESS STORY



## COMPANY

The San Francisco Foundation



## INDUSTRY

Philanthropy



## OBJECTIVE

The San Francisco Foundation needed to replace outdated and limiting technology with a modern, cloud-based Donor Management System that included a community portal to create a better experience for staff and donors.



## WHY

The San Francisco Foundation used Raiser's Edge as its Donor Management System. Raiser's Edge is a client-server application built using technology that dates back to the 1990s. It is not mobile-friendly and lacks the ability to customize beyond the creation of custom fields and attributes. It was difficult for users to access remotely requiring a remote desktop or terminal server. Data inconsistencies led to reporting issues and limited security functionality created security challenges.

## TECHNOLOGIES & SERVICES USED



## CUSTOMER QUOTE

“We’ve worked with StarrData since 2017 in a multi-phase Salesforce implementation. Their team listened and developed a genuine understanding of our business needs and pain points. They developed and implemented a solution that has made life easier for our internal staff and given increased functionality to our donors. The caliber of work is extraordinarily high and we are very pleased with what they’ve done to help us serve the San Francisco Bay Area community.”

- Dee Dee Brantley, Chief Operating Officer

## BEFORE

The San Francisco Foundation had been using several applications to support donor management, financial management, and grant management. These legacy systems used outdated client-server applications that created a myriad of issues.

Customization was incredibly limited. With Raiser's Edge, when the Foundation needed something changed to better support their business needs, they were limited to custom fields and attributes. Even then, they had to rely on Raiser's Edge support team to implement the changes.

Not only was it difficult to customize records, but it was also difficult or impossible to customize roles. That created a situation where everyone essentially had access to all data. And users were often overwhelmed by data not related to the tasks for which they were responsible.

To get a complete picture of a donor, staff would need to log in separately to multiple applications, open different records, and switch between different screens. It was a tedious and tiring process. Working remotely was incredibly challenging.

The Foundation needed to maintain servers, worry about backing up data and otherwise devote time and energy to keeping these legacy systems running.

Lastly, the legacy systems made it challenging for donors to access critical information as well as make gift recommendations and otherwise perform their role as community benefactors.

## AFTER

With StarrData's assistance, The San Francisco Foundation created a customized instance of Salesforce in addition to a Community portal that offered all of the benefits of Raiser's Edge and a whole lot more.

Gone were the days where the Foundation's IT staff needed to worry about maintaining servers and software quickly growing obsolete. In its place, they were confident that Salesforce would continue investing in their products while having the support of a large ecosystem. As a cloud-based application, remote work was a breeze.

Users were assigned roles which not only provided better and more granular security but improved the user experience with a role-based user interface and custom design. A donor's record could be viewed with all of the information in a single place thanks to integration with systems like Fluxx Grant Management.

StarrData created workflows that helped automate part of the donor management process that was previously prone to error. With a push of a button, processes that took hours before were finished in seconds.

A portal was created using the Salesforce Community Cloud that provided an easy and rich experience for the Foundation's donors to stay on top of gifts, make gifting recommendations, download tax documents, and much more.

## RESULTS

- The San Francisco Foundation's staff has a much easier time of doing their job as it relates to donor management. In their words, it's been a "game-changer".
- Data accuracy has improved which allows for much more reliable reporting.
- The Foundation saves hundreds of hours by automating tasks that previously required a time consuming manual process.
- The Foundation has implemented a community portal that simply makes it easier for donors to be donors.