Big Shoulders Fund: Organizational Transformation Using Salesforce

Big Shoulders Fund.

Big Shoulders Fund was founded in 1986 to provide support to Catholic schools in the economically disadvantaged areas of Chicago. Big Shoulders Fund has helped Chicago's children in need achieve their dreams through access to a quality, values-based education. The organization accomplishes this by investing more than $30 million annually in scholarship support and academic enrichment for students, operational improvements for schools, leadership development programs for the next generation of school leaders, and academic programs and professional development for teachers.

Simplified processes led to YOY increases
289% increase in applications received, 93% increase in scholarship funds requested, 60% increase in scholarship funds awarded

Enhanced ability to handle large volumes of applications in short timeframes
Year 1: Processed 6,000 applications in the first hour; Year 2: Processed 6,000 applications in the first 9 minutes

Automated processes translate to savings in both time and money
Over 4 years, have saved 30,000 hours of staff time and significant personnel costs due to automation

"Exponent Partners has truly been a partner to us. They have brought best practices of Salesforce in the nonprofit world into our organization. Their in-depth understanding of Salesforce has allowed us to optimize and enhance our use of the platform, so that we can harness it fully to support various efforts across our organization. They have taught us how to fish, making us more self-sufficient moving forward."

– Kate LaMantia, Senior Systems Analyst, Big Shoulders Fund

Scholarship applications managed using spreadsheets and paper applications

Big Shoulders Fund was using a manual system of spreadsheets and paper applications to receive and award approximately 5,000 scholarships to students annually. These labor-intensive efforts meant staff spent a significant amount of time completing data entry. Moreover, the amount of manual effort involved made human error more likely.

Donor management solution fell short of needs

The nonprofit had been using a server-based system for donor management, primarily to record transactions. However, the system's limitations were negatively impacting productivity. Big Shoulders Fund had created workarounds for some of the solution's shortcomings, but this meant that some data was being tracked in spreadsheets, limiting the ability to get an accurate historical view of a donor's profile and impact. According to Christine Sweeney, Director, Development Operations and Donor Services at Big Shoulders Fund, "We wanted a solution that would give us more agility in our fundraising and that would provide a single view of what engagement looks like over the life of a donor, so that they could build even stronger relationships." The fact that the donor management system was on an installed server created additional challenges. "Staff in the field had to call the office regularly and ask for data to be pulled and emailed," explained Christine. "We wanted a solution that was cloud-based, so that staff—no matter where they were—could easily access the data they needed and be more productive when they were outside of the office."

Limited reporting capabilities for both scholarships and donor management

The organization wanted to move towards a more effective data management and reporting solution. The data was housed in multiple places, making it difficult and time-consuming to create reports, and the organization wanted to more efficiently collect additional data points. As a result, the organization was challenged to create meaningful metrics that they could easily track.

Tracking volunteer engagement was challenging

Spreadsheets were being used to track volunteer engagement based on estimates of hours completed. There wasn't an ability to easily drill down into the data by school, volunteer, or engagement type.

"For the Tax Credit Scholarship, made possible by the Illinois Invest in Kids Act, we were given a two-month window to implement a completely different model than the one we already had in place in Salesforce. The nimbleness of the Salesforce platform allowed us to work with Exponent Partners and apply two models in Salesforce within the tight deadline. It was truly transformative."

– Kate LaMantia, Senior Systems Analyst, Big Shoulders Fund

Solution

Salesforce was implemented as part of a pro bono project that was donated by PwC. After the consulting firm completed their generous engagement in mid-2016, post-configuration, Big Shoulders Fund engaged Exponent Partners to provide training and support on their new Salesforce instance. Over the years,

Big Shoulders Fund has continued to work with Exponent Partners on several consulting projects with a view towards optimizing the nonprofit's Salesforce instance with improvements and configurations that are specific to nonprofits.

Big Shoulders Fund Scholarship Program:

Big Shoulders Fund selected Salesforce in early 2016 as a solution to its challenges related to processing and tracking thousands of student scholarship applications received

from 75 schools annually. The system was also configured to receive and award approximately 5,000 scholarships to new and returning students annually.

Tax Credit Scholarship Program:

When Big Shoulders Fund was approved as a Scholarship Granting Organization (SGO) in 2017, the nonprofit quickly identified Salesforce as the best tool to facilitate the related processes under the Illinois Invest in Kids Act. With only two months to launch, the application was created

in-house using FormAssembly, a form building platform designed for Salesforce. Then Big Shoulders Fund engaged Exponent Partners to configure the organization's Salesforce instance to allow for the capture of required data using processes that followed State-mandated rules.

Donor Management:

In January 2019, Big Shoulders Fund decided to migrate their donor management database to Salesforce. Exponent Partners designed and configured a donor management system using the Salesforce platform, and also migrated the

nonprofit from Salesforce Classic to Salesforce Lightning. In July 2019, Big Shoulders Fund started using Salesforce, exclusively, for both gift and donor management.

Simplified processes for scholarship applications

The move from paper-based applications to online applications using Salesforce allowed for a 289 percent increase in the number of scholarship applications received from FY17 to FY18, a 93 percent increase in funding requests received from FY16 to FY17, and a 60 percent increase in scholarship funds awarded between FY15 and FY20. "The dramatic increases in applications and funding requests reinforced the fact that it was much easier for people to apply online instead of going through the cumbersome paper application process,"

explained Kate. The organization also saved more than 43,000 pages of paper during one year thanks to the transition away from paper-based applications. Additionally, with the help of Exponent Partners, Big Shoulders Fund reduced the number of data points collected from 45 on the paper application to 15 on the online application, focusing on those that are truly of value to the organization. These improvements have been possible as processes and flows are now used, reducing the number of steps required to complete certain tasks.

Improved efficiency due to automation

With the automation of many processes using Salesforce and Form Assembly, Big Shoulders Fund has saved 11 work weeks per year of data entry for application processing and 67 hours per year for award processing, while eliminating errors caused by human entry of data. "We have saved more than 7,000 hours annually from automating our scholarship processes from paper to electronic," stated Kate. "This reduction in hours has yielded significant personnel savings. Bigger picture, FY20 marks the fourth year of automation

via Salesforce and Form Assembly, resulting in almost 30,000 hours saved, since the inception of the program." With the help of Exponent Partners, the nonprofit also integrated Apsona, a Salesforce app which saves the organization even more time thanks to more robust and streamlined batch data entry, the ability to produce merge document for acknowledgement letters, and mass update and mass deletion capabilities that have equipped the nonprofit to significantly improve data integrity.

Configured Salesforce to receive and process Tax Credit Scholarship Applications

Big Shoulders Fund became the only large-scale SGO in Illinois to successfully launch the Tax Credit Scholarship application three years in a row. Salesforce enabled the nonprofit to efficiently accept thousands of applications in short timeframes, and then process them on a first come, first served basis. Year 1 resulted in over 12,000 applications, with more than 6,000 applications received in the first hour.

Year 2 resulted in over 14,000 applications, with more than 6,000 applications received in the first 9 minutes. Year 3 resulted in further successes with almost 14,000 applications, 7,500 of which were received in the first 9 minutes. These results were achieved while ensuring compliance with program legislation and providing a high-quality customer service experience.

Enhanced donor management and insights into relationships

The cloud-based Salesforce platform is easily accessible to staff in the field, and now houses all data related to contributions and pledges, including donor history and notes. "Not only have we become more productive when it comes to donor management, but we now also have a deeper understanding of our community of supporters and how they are engaging with

our organization," stated Christine. "We are now better equipped to manage and analyze our robust historical data of fundraising events and appeals, and then use it to inform decisions." In parallel, thanks to the ability to capture donor permissions in Salesforce, schools now have the ability to steward their donors and cultivate renewal of vital contribution revenue.

Gained more sophisticated reporting capabilities

Access to real-time data is a game-changer when it comes to providing reports to various stakeholders, including the organization's executive team. "Before Salesforce, most of that data wasn't available to us, or if it was, it was difficult to aggregate and report on," explained Kate. "We can now report on any data that we collect. For scholarships, we can report on the number of applications received, the top 10 elementary schools, the top 10 high schools, the grade level that is most in need, the breakdown of applicants by population and more." For the Tax Credit Scholarship, staff can now easily report on the cumulative history of the program, including the number of unique donors and total contributions.

Started to accurately track detailed volunteer information

The nonprofit can now track details about volunteer engagement at a granular level. For example, staff will be able to see accurate data about the total volunteers engaged by school, the cumulative hours over the life of a contact relationship, the engagement history with a given school, and service hours by service engagement type, such as mentoring, school service days, tutoring, and test prep.

Able to nimbly support the organization's needs and growth with a flexible platform

When the COVID-19 pandemic struck, staff at Big Shoulders quickly released an application for emergency support, thanks to the infrastructure that was in place in Salesforce. Following the application's release, the organization was able to easily report results to donors, giving them specific details about what percentage of scholarship recipients were positively impacted by the donations received.

Moving forward, Big Shoulders Fund will continue to expand its use of Salesforce as the organization grows, with a view towards taking full advantage of the platform's capabilities.