

Case Study

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Introduction

Project Hope Alliance (PHA) is a nonprofit organization in Costa Mesa, California that works with homeless families who have school-age children. The two main focuses for the organization are in assisting families in getting stable housing, and in supporting children's education. In my observation, I focused on learning about PHA's information systems and how they are used in their day-to-day operations. PHA raises all of their funds through private donations, since government funding comes with restrictions on how the funds can be used that would limit how they could assist their clients. Each year, they host a fundraising gala attended by many of their donors, many of them quite wealthy or representing corporations with a lot of money to give. Most of their organization's money for the year is raised at this event, so it is crucial that everything runs smoothly. PHA holds most of their information in a Salesforce database, but the information system for this fundraiser was both buggy and separate from Salesforce, causing frustration among employees and creating extra work.

Methods

I have spent ten hours observing employees' daily work at the main Project Hope Alliance office in Costa Mesa. Much of my time has been spent with the data analyst but she often is working with other people, so I have gotten a variety of perspectives on the information systems in use at PHA. I have tried to observe the processes PHA uses to support clients—from the first phone call to being housed to receiving educational support for kids—and the documentation and information that accompanies each part. Throughout my observation, I have made quick jottings in a notebook—words or phrases to jog my memory later. After I get home, I type up my full observation notes, expanding on what I wrote in my notebook and checking off parts of my jottings to make sure I don't miss anything in the full version of my notes.

Findings

The computer system Project Hope Alliance used to coordinate donations at this this year's fundraising gala had some serious bugs. While these bugs were a major problem, if they were fixed or if PHA switched to a different, less buggy, software, PHA's system for managing donations would still be inefficient.

At the fundraising event, donation information was logged in two ways. The primary record was kept through a software they purchased for the event called BidPal. BidPal provided iPads to receive credit card information, processed their payments, and kept a record of the details of each donation. A second copy of information about the donations, including bid numbers, amounts, and payment methods, was kept on paper and organized onto clipboards.

As some of the employees were going through the lists of donations from the gala to process payments, they complained about the many bugs in the BidPal system they had encountered. During the event, as they were checking guests in on the iPads, the software wouldn't accept valid email addresses. The PHA employees tried testing it out with their own email addresses, which did not work either. Later in the event, when they were inputting donations and reading credit cards for payment, the iPads were not working properly either. Instead of capturing the credit cards' information when they were swiped, nothing happened. They determined that the

software on the iPad was the issue, since they moved the card readers to some personal iPads brought by employees, loaded with the same app. Doing this allowed them to have some working devices that they could juggle to make sure all the payment information was collected. I didn't hear anything positive about BidPal, only descriptors like "complicated" or, probably more honestly, "a pain in the ass."

PHA is planning on switching to a different fundraising software for their gala next year. This new software is cheaper for the organization, and, for events like the gala, the fundraising company sends staff to help operate their software. The volunteer coordinator was very enthusiastic about this new system. From her perspective, it would solve all the problems that they had been dealing with from their current setup.

Within the context of how information is managed within PHA, there is an inherent issue in using a separate system for a fundraising event, whether BidPal or another system. These systems are designed to maintain a database of donors and a history of their donations. PHA, however, has just finished migrating virtually all of their data to Salesforce, including clients, case managers, records, and information about donations. Making sure the data from BidPal is migrated properly to Salesforce is a lot of extra work.

On a later date, I watched as PHA's data analyst and another employee reconciled outstanding donations in Excel to import into Salesforce. They highlighted the unusual ones, such as a donation from Taco Bell, to follow up on later. A lot of this part of the work required confirming information with other staff members about whether donations are coming from a personal account or from a foundation, among other information. "Double check with Jenny," "Let me ask Marie." Donors in the Excel spreadsheet then needed to be matched with their records in Salesforce by finding their Salesforce ID number and inserting it into the spreadsheet. The data analyst then added other information like the type of donation (for example, a live auction, silent auction, or raffle).

Once this information was entered into the spreadsheet, the data analyst went through the information and made sure the names on the donations matched up exactly with the existing records in Salesforce—the name couldn't be "Gregory" in Salesforce and "Greg" in the spreadsheet. Sometimes the information was unclear as to who exactly had donated, so she had to confirm with other people who should be entered into the system. To finish preparing the spreadsheet to be imported to Salesforce, she created campaigns in Salesforce divided into donation categories, then inserted the codes for these campaigns into the Excel spreadsheet.

Discussion

An ideal system for managing Project Hope Alliance's fundraising would be one that not only is not prone to the bugs and errors BidPal seems to be, but also would be integrated with the Salesforce database that is crucial to the rest of PHA's operations. I envision a system in which, right from the start, donors and their donations are matched with their records in Salesforce, meaning they don't have to spend days of work migrating the data after the fact. An investment in such a system would help the organization to expand even more in the future as well. The last few years have been years of a lot of growth within PHA, and if this continues, they will need more donations, increasing the amount of work that needs to be done to process these donations and input them properly in the system.

Practically, such a system might be prohibitively expensive. Depending on how PHA's Salesforce system is set up, it might have to be a completely custom solution and thus not cost

effective. While spending days migrating information takes a lot of time and expense, if it only has to happen once a year for a big fundraising event, it may not be a big enough issue to be worth investing in a solution.

In addition, aside from BidPal's bugs, the practices and structure of the organization mean that it can compensate well for the flaws in the existing system. One example of this is in the information that is not contained in the documentation in BidPal or on paper—they might know that a donor gave money, but not whether it should be drawn from her personal account or from Taco Bell. The organization is small enough, however, that the person processing payments knows who to talk to in order to get the information they need. The culture is such that walking to another person's office and interrupting what they're doing for a minute for help is normal and accepted.

Some areas for further research are in the alternatives for fundraising software that are available. There are many choices in the market for nonprofit fundraising software, and it's possible that there's a solution available for them that would both integrate with Salesforce and be a reasonable cost. Going forward, it would be helpful to see firsthand one of PHA's fundraisers and the process of actually receiving donations.

Conclusion

In my study, I focused on learning about the information systems that Project Hope Alliance uses to assist clients. For the most part, these processes work well, especially when they make full use of the Salesforce database. What stood out to me most was how their system for managing donations contrasts with everything else. Not only did the software they use have major bugs, but it is not integrated with Salesforce, exports data in a cumbersome format, and requires a lot of manual work. This extra work is tedious, takes a lot of time, and could be error prone if not done correctly. The processes of PHA help to alleviate the issues with the current system, but a new computer system to manage donations could solve them and enable further expansion without overhead that increases with a greater number of donations.