

MOSS BEACH HOMES – CASE STUDY

Challenge

- .: Moss Beach Homes, Inc. (MBH) is a California state-wide child welfare agency with many distinct programs, each with its own database for tracking organizational information which needed to be consolidated into one system
- .: Two of MBH's programs are volunteer-driven and needed a way not only to track daily volunteer hours but to manage the extensive in-take process as well as long-term volunteer placements at a variety of locations and settings.
- .: MBH needed an air-tight system for tracking event participation and communicating with event attendees
- .: MBH was becoming more intentional about developing individual donors and corporate partners and needed a system that would help them nurture these relationships over time

Solution

- .: Implement Donor and Grant Management using Salesforce Opportunity Management
- .: Create custom objects in salesforce for Volunteer recruitment, in-take, placement and hour tracking
- .: Configure Campaign object in salesforce to track Event participation
- .: Deliver training session designed for staff who would be using salesforce on a regular basis

Resulting Benefits

- .: The customization and implementation process provided venue for diverse programs withing MBH to engage in conversations about common needs and processes
- .: The process of populating the system with information motivated staff to begin the major task of compiling large quantities of past and current data and filling in missing gaps, which will eventually give staff direct access to invaluable historical and real time reports
- .: MBH is currently using the campaign/event management feature to keep track of invitations to a major annual fundraiser, as well as in-kind, individual, and corporate donations.

Quote

"We are just getting started but can already see the great potential for Salesforce to increase our ability to stay on top of the massive amount data and relationships our agency must maintain on a day-to-day basis. Salesforce will help ensure that we are all on the same page, regardless of program affiliation or geographic location." - Eunice Nichols, Director, Experience Corps Bay Area (a program of MBH)