



# Technology Consulting in the Community

Information Systems  
Management Course 95-822

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**Fall 2008**

**Final Consulting Report**

**Heritage Health Foundation  
Incorporated**

**Arvind Shrihari**

**Carnegie Mellon University  
Pittsburgh, Pennsylvania  
[www.cmu.edu/tcinc](http://www.cmu.edu/tcinc)**

**Carnegie Mellon**



# Heritage Health Foundation Incorporated

## Executive Summary

Student Consultant, Arvind Shrihari  
Community Partner, Ron Gaydos

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### I. Background Information

Heritage Health Foundation Incorporated is a non-profit organization located in Braddock, Pennsylvania

*The mission of Heritage Health Foundation is to enable individuals and organizations to improve health, education, economic strength, and social vitality in their communities.*

HHFI achieves its mission through programs like early education, green job training, and a community van service.

The consulting partner, Ron Gaydos, is the VP of Development at HHFI and oversees the newly forming job training program as well as the Community 2.0 program.

### II. Consulting Tasks

The first major task the consultant worked on at HHFI was integrating data on potential donors from various databases around HHFI into the CRM, Raiser's Edge. Before the data integration, HHFI had thousands of records on potential donors outside the CRM where Cindy, the Director of Annual Giving, did not have access to them. This meant that fundraising and the organization's income were suffering. This task involved exporting data from the databases, cleaning the data and ensuring it was still relevant, importing the data into the CRM, and developing data management guidelines for future HHFI programs.

The second major task the consultant worked on at HHFI was developing a technology budget. Before the budgeting project, technology expenditures and planning were done in an ad-hoc manner with. This made it difficult for Jeff to predict technology expenditures for future years as he did not have a clear idea of how much the organization was spending on technology each previous year. Additionally this made it difficult for the organization to describe its technology budget and expenditures on proposals for grants. The consultant worked with the CFO, Jeff, to analyze all technology expenditures in HHFI's programs and put them into a budget template. This template was then compared to various sample technology budgets and budgets for organizations similar to HHFI to help make sure nothing was missed. Finally, Jeff and the consultant filled in the budget template with 2008 expenditures and used the budget to come up with a projected budget for the 2009 fiscal year.

### III. Outcomes Analysis and Recommendations

Before the first task of integrating information on potential donors into the Raiser's Edge CRM, the CRM contained roughly 2,000 records. These records included HHFI employees and contained outdated information like incorrect addresses and information on people who passed away. At the end of the project, Raiser's Edge contained completely clean data and almost 10,000 records on potential donors. For Cindy, having access to this data means her fundraising efforts reach over five times as many people as it used to. The improved CRM also means that she can now create detailed and organized reports on HHFI's donors through Raiser's Edge.

The consultant also worked with Jeff, the CFO, to create a technology budget for HHFI. The consultant and Jeff first went through all the technology expenditures of the company and organized these expenditures into set categories across the different programs. This template was then cross referenced with existing and recommended templates. The template was filled with 2008 expenditures and the consultant then worked with Jeff to develop a budget for 2009.

The first recommendation the consultant made was for HHFI to switch from its expensive, CRM and Accounting software, Blackbaud, to, cheaper alternatives. The organization spent almost \$8,000 on Blackbaud software yearly and was using only the basic functionalities of the Raiser's Edge CRM and not using the Financial Edge fully either. The consultant analyzed The Salesforce CRM to be a much cheaper alternative as Salesforce provides its CRM software freely to non-profits. The consultant determined that switching costs would be easily offset in less than two years and identified quality support for the CRM as a possible issue.

The second recommendation the consultant made was leveraging social networking in HHFI's newly forming Community 2.0 Program. The Community 2.0 program involves using technology to aid in community building and awareness efforts in the Tri-Boro area. The program revolves around a website that allows members of the community to interact with community projects and others in the local community. The consultant identified the potential for building an online community with social networking features on the Community 2.0 site. The consultant also identified ways in which current online social networks such as Facebook and Myspace could be leveraged through their respective APIs, Facebook Connect and OpenSocial.

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**Community Partner**

Ron Gaydos  
*rgaydos@hhfi.org*

Heritage Health Foundation Incorporated  
445 Fourth Street, Braddock, PA, 15014  
[www.hhfi.org](http://www.hhfi.org)

**About the Consultant**

Arvind Shrihari  
*ashrihar@andrew.cmu.edu*

Arvind is a sophomore studying Information  
Systems at Carnegie Mellon University

# **Heritage Health Foundation Incorporated**

## **Final Consulting Report**

Student Consultant, Arvind Shrihari  
Community Partner, Ron Gaydos

### **I. About the Organization**

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#### **Organization**

*The mission of Heritage Health Foundation is to enable individuals and organizations to improve health, education, economic strength, and social vitality in their communities.*

The organization is composed of five smaller programs that help the organization achieve its mission in a particular capacity. The programs are WorkLink, 4Kids, The Hospital Parking and Housing Initiative, the Tri-Boro Development Forum, and a newly-forming Job Training program.

#### **Facilities**

HHFI has a main office that holds about 20 employees at 445 Fourth Street, Braddock, PA 15014. The building has multiple floors and rooms or cubicles for all the employees. Additionally, there are conference rooms and a kitchen. The main 4Kids center is down the street and there is also a small HHFI office at the Braddock Employment Training Center (BETC), which is about half a mile away from the main office.

#### **Programs**

WorkLink - A free community van service that helps people get to jobs and other needs of daily life.

4Kids - Provides quality education for young children.

The Hospital Housing Initiative – Renovates housing infrastructure and helps individuals in the area find housing

The Tri-Boro Development Forum – Improves the overall quality of life in the communities it represents.

The Job Training program – Aims to provide training to those qualified on environmentally-friendly jobs with a living wage.

#### **Staff**

There are about 65 employees who work for HHFI. About 35 of them work at the main office on Fourth Street and the rest are mostly in the 4Kids program. Each member of the staff has a personal computer and though they might not be too comfortable with computers, they know how to use e-mail. Other staff members are Bob Grom, the CEO; Jeff Au, the CFO, Cindy Elliot, the director of annual giving; and Ron Gaydos, director of community development. Cindy is proficient in general computer use and the Office Suite. She is also skilled in using the Raiser's Edge Customer Relationship Management System and she has a good understanding of relational database concepts such as normalization and "garbage in, garbage out". Jeff is also very adept with both software and hardware technology. He frequently uses the software like

Microsoft Excel and QuickBooks for accounting purposes, troubleshoot printers and computers occasionally for others in the organization, and has a solid understanding of computer networking.

## **Technical Environment**

All the computers in the main office as well as some printers and servers are on a Local Area Network. The organization also has Wi-Fi in the building and broadband internet from Comcast, which goes down about once or twice every few months. The branches of the organization that are not part of the main office are not connected in any way to the network at the main office.

The organization also has a CRM called Raiser's Edge from Blackbaud. This software is supposed to be used to keep track of potential donors to the organization and is used during fundraising drives. In addition to the Raiser's Edge CRM used by the organization to track potential donors, different programs use many databases like Access and Excel spreadsheets to store this information.

Some HHFI programs like Work Link also have unique technology uses. WorkLink, the community bussing program, uses technology like GPS and active RFID track the location of its busses and store information on ridership and member data.

HHFI and all of its programs also have websites but the main HHFI website is not frequently updated and it currently links only to three of its programs' websites.

## **Technical Management**

The individuals with the technology know-how end up initiating and working on technology projects that are relevant to the entire organization. For example the CFO is currently working on providing all branches of the organization access to the main network because he is familiar with networking technology. Jeff is also the CFO and ends up informally doing the technology budgeting and planning as there is currently no formal, codified process for this. Jeff also makes sure that computers are updated every three years.

Within specific programs, technology management is again done by those with the know-how. For the Work Link program the few employees involved are tech-savvy and manage all the technology for that project. HHFI also hires an outside organization to host and partially manage many of its websites. The organization has also been getting the help of a consultant from Micro Rental, a computer solutions provider in Pittsburgh, for any technology needs that come up like the need to upgrade software on a computer that Jeff doesn't have the time to take care of. Different people in different program are responsible for updating their websites and the CP, Ron Gaydos, has access to and ends up updating websites like the one for the TBDF program. Cindy is in charge of the CRM and she uses it to identify potential donors for fundraising.

## **Technology Planning**

The organization does not have a technology plan and doesn't see the need for one. Technology planning for the entire organization is currently done in an ad-hoc way mainly by Jeff. Additionally, when a new program is formed, no special or explicit attention is paid to planning the use of technology.

## **Internal and External Communication**

Communication happens through email, telephone, and in-person. Information between branches or different locations of the organization is shared through emailed or sent by post as there is no organization-wide network.

## **Information Management**

Each department is in charge of its information. Employees store data in various formats including: on paper, in Word or Excel documents, and in Databases. Much of this, however, depends on the employee's knowledge and familiarity with technology. Each program has its own databases in various ways/formats. Additionally, HHFI stores information on donors in a CRM called Raiser's Edge. The CRM contains 2,000 to 3,000 records but Cindy suspects some of the data is outdated and estimates that there are anywhere from 8,000 to 10,000 records on potential donors outside the CRM in databases in the different programs the organization has.

## **II. Scope of Work**

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### **Task 1. Develop a Technology Budget**

#### **Description of Problem**

Heritage Health does not currently have a technology budgeting system. While program leaders in different parts of the organization have an idea of technology expenditures in their particular programs, there is a lack of a comprehensive, documented vision of technology budgeting for the entire organization. Because of this, the organization does not have a vision of how much money has been spent on technology in the past, how much money the organization is currently spending on technology, and the organization cannot predict technology budgets for future years.

Currently, Jeff, the CFO, incorporates technology into the budget as needs come up. He encourages the programs to try to get grants for computers and other technology whenever they can but whenever there is a need for technology spending people from the organization's different programs come to him and he allocates part of the budget for their need in an ad-hoc fashion. The problem with this system is that it is difficult for Jeff and to predict the technology budget for the organization for any given fiscal year. According to Jeff, this lack of planning allows for runaway budgets as there is no formal cap or expected limit on what the organization is willing to spend in technology and no such budget has been formally conveyed to the different programs. Because HHFI has many different programs with significantly varied technology usage, it is difficult for Jeff to predict how much of the budget any one program will need as this would require him to be knowledgeable and up-to-date on what is happening in every program. Jeff has expressed concern to the consultant over the lack of a formal budgeting process for technology and agrees that a technology plan created with the approval and input from all the programs will help greatly in addressing the issue.

Additionally, a lack of an formal technology budget for HHFI makes it difficult for Jeff and others in the organization to apply for grants since they cannot accurately represent the organization's current expenditures. Jeff has stated that this has been a big issue in the past and it is one that he is currently facing as he is writing a proposal for a grant for networking technology for the entire organization.

#### **Description of Work Plan**

The consultant will work with Jeff, the CFO, and Ron, the Community Partner, to develop a technology budget that captures current technology expenditures at HHFI and test this budget by using it to predict a technology budget for the 2009 fiscal year.

This will be performed through the following steps:

1. The consultant will work with Jeff to survey technology expenditures throughout entire organization including taking stock of hardware, software, and training, by talking to leaders in each of HHFI's programs and going through each program's individual budget
2. The consultant and Jeff will work together to establish major categories across each of HHFI's programs and create a technology budget template in an excel spreadsheet
3. The consultant will research technology budget templates in HHFI's partner organizations as well as sample ones on the web and cross reference them with the created technology budget.
4. After finalizing on the technology budget, Jeff will go through each of the cells and programs and fill in the budget template for the 2008 fiscal year



5. Finally, the consultant will work with Jeff to use the 2008 technology budget to predict a budget for the 2009 fiscal year
6. Jeff will be in possession of the technology budgets as he is the CFO and will update and revise them each year as he sees appropriate

### **Expected Outcomes**

The expected outcomes for each of the steps are:

1. HHFI will have a clearer picture of the exact state of technology expenditures throughout the organization
2. The organization will be able to predict technology budgets for future years reasonable accurately
3. The technology budget will cover all expenditures across all HHFI programs
4. HHFI will be able to better fill out grant applications accurately capturing and representing the organization's current, past, and predicted future technology expenditures since it will have a formal technology budget
5. The technology budget will always be relevant and up-to-date as Jeff will be responsible for it

### **Additional Impacts**

The budget will have a positive effect on HHFI as a whole since it will allow the organization to take a look at its technology use at a high level. The budget will allow the organization to get more funding since it can now accurately represent its technology expenditures

Jeff will also be able to better budget the organization's expenditures as a whole now that it is clear how much is being spent on technology by each of the programs. The technology budget will help Jeff identify areas of particularly high technology expenditure, which will be useful to identify if Jeff is trying to reduce the organization's overall spending.

### **Feasibility**

Developing a technology budget for the organization is definitely feasible. There is definitely time to perform the tasks proposed although one concern is the thoroughness with which the consultant can perform the first task of surveying the entire organization's technology expenditures as HHFI is quite large. However, this issue might be mitigated as many parts of the organization might have current information on their technology spending and use. The community partner is committed to this task as it is one that has much potential to help the organization. More importantly Jeff sees much value in this task and is also committed to it. The consultant has the required resources to analyze the current budgeting situation at the organization and has access to resources for developing a comprehensive technology budget. Additionally, many individuals in the organization are tech savvy and are in a position to help with technology analysis in the organization. The budget will be sustained by Jeff after the consultant leaves. Jeff is proficient in Excel so editing the document will not be a problem.

## **Task 2. Integrating Raiser's Edge With Other Databases**

### **Description of Problem**

Heritage Health has one main database called Raiser's Edge that contains fundraising information on potential donors. Raiser's Edge, a customer relationship management system, is maintained by Cindy Elliot, Directory of annual giving and she relies heavily on it to fundraise for the organization.

There is an estimated 8000-10,000 records on potential donors outside Raiser's Edge in the form of other databases like Microsoft Access, Excel spreadsheets, written records, and ProCare(a childcare management system). This data outside Raiser's Edge is maintained by employees in different parts of the organization who don't have direct access to Raiser's Edge and usually need the data they have to be in formats that do not lend themselves to Raiser's Edge.

The issue of data scatter at the organization has a very serious impact on its ability to achieve its mission as it cripples fundraising efforts. The lack of information on potential donors for Cindy means that she is unable to reach nearly over 60% of the organization's contacts. This is a problem that impacts all programs in the organization.

### **Description of Work Plan**

The consultant will work with the Ron Gaydos, Cindy Elliot, as well as individuals across the organization with data on potential donors to clean the data inside Raiser's Edge, migrate data outside Raiser's Edge into it, and ensure this situation doesn't occur again. It should be emphasized that the consultant will be working on setting up a process of ensuring data migration is feasible and not trying to get all data into the CRM. Want to figure out how to do it for general cases and special cases.

This will be performed through the following steps:

1. The consultant and Cindy will survey data in Raiser's Edge to determine extent of outdated information and devise means of cleaning up the data.
2. Both the consultant and Cindy will clean up data currently in Raiser's Edge either through scripts, excel formulas, or manually as is necessary
3. Survey data on potential donors outside Raiser's Edge and determine volume and format of data.
4. Determine best method of extracting data from each database format and loading data into Raiser's Edge with minimal data loss
5. Extract cleanse, and load from outside databases into Raiser's Edge.
6. Create a document for new HHFI programs with guidelines on data storage to make sure problem does not occur again.

### **Expected Outcomes**

The expected outcomes for each of the steps are:

1. There will no longer be a question as to the validity and quality of data in Raiser's Edge
2. Raiser's Edge will contain the entire organization's data on potential donors.
3. Cindy will be able to more effectively hold and target fundraising drives
4. New programs at HHFI will share data on potential donors with the CRM and so the CRM will not become outdated or lose usefulness again

### **Additional Impacts**

This cleansing and migration of data on potential donors will have a significant impact on the organization as a whole as it is expected to greatly improve fundraising efforts, which in turn will provide more funds for HHFI's facilities and programs.

Additionally, the staff will have access to a centralized repository of individuals associated with HHFI, which could make them more powerful in doing their jobs. Finally, information management will become much easier for fundraising efforts as Cindy will be able to generate more accurate and reports through Raiser's Edge.

## **Feasibility**

This solution is feasible. However, if the amount of data outside of Raiser's Edge is too large or unruly, the time required to finish the task may not be enough. However, Cindy Elliot is passionate about the project and will be able to help with all stages. The consultant has the required resources available to implement the project and has many of the skills required for the project. There are some privacy concerns in the solution because much of the data that has to be dealt with like ProCare data is sensitive. Also, while it is unlikely that all the data migration will happen while the consultant is at the organization, the consultant will ensure that the process for the migration to happen is setup and understood by Cindy and other key employees. Hopefully, a solution can be reached where all members of the organization have direct access to Raiser's Edge and update it whenever they obtain new information on potential donors to maintain the success of this project..

### **III. Outcomes and Recommendations**

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#### **Task 1. Data Migration Project**

This task involved consolidating data on potential donors into HHFI's CRM, Raiser's Edge. The different steps were exporting the data from databases throughout the organization into the CRM, normalizing and cleaning the data, and setting up guidelines for new programs to ensure that this problem did not occur again.

##### **1. Move data on potential donors into CRM**

Before the project, the CRM contained about 2,000 records. These records included employees and hadn't been cleaned or used in years so much of the data was probably invalid. At the end of the project, Raiser's Edge contains almost 10,000 records of clean and relevant data. This is a 500% jump in the number of records. Additionally, there used to be no way to generate reports on potential donors for the entire organization and each program had to do this on its own. Now, Cindy is able to create useful reports in Raiser's Edge that provide valuable organizational intelligence for the company's fundraising efforts. This increases the organization's capacity to achieve its mission exponentially because it allow Cindy, the director of annual giving to reach five times as many potential donors and thus increases the potential for revenue from donations greatly. Indeed, some of the new records in Raiser's Edge are individuals who have benefitted greatly from its services like its pre-school program and it's bussing program and might be eager to contribute to the organization.

The outcome can be sustained because Cindy is now an expert in data management and transfer and knows how to deal with mangled data from other databases. Cindy is also able to communicate to the leaders of programs at HHFI what basic fields she needs for Raiser's Edge and the other programs have now included those fields into their databases. Cindy showed both of these traits when undertook a full data migration process for the WorkLink Database starting from communicating with John from the WorkLink program about the minimum fields she needed for Raiser's Edge and then importing the data he gave her into the CRM by herself in a couple of days. Cindy's ability to use Raiser's Edge is also definitely not an issue because she set the software up herself initially, has shown a mastery of its basic features like managing contacts and has even demonstrated some of its advanced features like setting up campaigns to the consultant. One issue that has not been considered or tested is whether the organization has the expertise to integrate data from a database other than those it currently deals with. This might be important for HHFI going into the future because, for example, the organization recently acquired the Ship of Zion into its WorkLink Program. Ship of Zion was another bussing program with its own data and WorkLink acquired that program and had to integrate it into HHFI operations. This involved integrating the Ship of Zion database into the WorkLink database, which John, the consultant from Microrentals, took care of. However, in the case that organization has to maintain a new type of database or one of the current programs starts using a new database, though the consultant believes that Cindy has enough experience with technology to adapt or employ John's help for the task, it is not completely clear how this will impact Cindy and maintenance of the CRM.

##### **2. Data Cleansing**

Before the project, Raiser's Edge had data in it that was outdated and irrelevant. Many records contained information about people that were no longer alive or no longer lived at the address specified in the CRM. All of the 2,000 or so records in Raiser's Edge were "cleaned" and

normalized as Cindy was able to go through all of the data to ensure there were not typos or inconsistencies in spelling. Figure 1 in Appendix A is an example of the type of messy data exports that had to be dealt with. In this case, one record has spilled across two rows. Almost all data coming into Raiser's Edge was also visually inspected by either the consultant or Cindy. Cindy is also able to manipulate exports to excel well because she has shown that she can do things like write little formulas to remove duplicates. She has also shown that she understands the need to normalize and "clean" the data because she did this as a part of the WorkLink data migration. The quality of the data increases HHFI's capacity to meet its mission significantly as fundraising efforts are much more targeted and accurate now. One issue that still remains unresolved is eliminating the need to go through exports from other databases and normalize or structure the data so it can be imported by Raiser's edge. For example instead of Cindy having to modify the messy export ProCare care generates every time ProCare data in Raiser's Edge needs to be updated, the organization should figure out how to export the data from ProCare appropriately.

### **3. Create Data Management Guidelines for New Programs Task**

There was no process or set of guidelines in place for new programs at HHFI before with regards to data management. This resulted in different programs managing their data in completely different ways, making the data migration project very difficult. However, the consultant, the CP-who is in the process of starting a new EPA Job Training Program at HHFI, and Cindy have worked together to come up with a set of rules and guidelines for new Programs on how to store their data that will make data migration into the CRM much easier. These guidelines (attached as Figure 2 of appendix A) include fields they should have in their database, standards for spelling and abbreviations such as "Jr." instead of any alternative spelling of the word/abbreviation, standards for databases to make sure they can export data in a form that can then be imported into Raiser's Edge, and instructions to meet with Cindy about data management. The guidelines also ask that the program setup a regular meeting time with Cindy based on how frequently new data comes into the program in order to perform data migrations. Previously, programs like WorkLink had been started without any communication with Cindy or any thought to integrating data on members with the CRM. These guidelines allow the CRM project to be sustainable as it makes sure that new programs don't have islands of data on potential donors not in the CRM and that the CRM is updated anytime data in the other programs is updated as well. The CP has followed the guidelines with the newly created program and both the CP and Cindy are satisfied with the results. This process allows the CRM to have more data and helps maintain the quality of the data. This, in turn, will increase donations and improve the organization's ability to achieve its mission. The consultant has also asked the CP, who is a board member at HHFI, to bring it at one of the meetings so leaders in the organization are aware of it.

### **Task 2. Technology Budgeting Project**

HHFI previously didn't have a formal process for technology budgeting. This meant that the CFO didn't have a robust way of knowing how much the organization spent on technology as a whole every year, had trouble predicting how much money to set aside for technology in budgeting for future years, and had trouble detailing the organization's technology spending on applications for technology grants. The consultant worked with the CFO, Jeff, to create a template for technology budgeting each year that includes both technology spending for the organization as a whole as well as spending for each program. This budget template is attached in Appendix A.

## **1. Identify Technology spending in all areas and consolidate information into one Spreadsheet**

The consultant worked with Jeff to look through current budgeting reports to identify technology spending on hardware and software as well as spending in areas not so obvious like employee training for software. The consultant also cross referenced the identified areas of spending with sample technology budgets of partner organizations as well as online templates to ensure nothing was missed. Additionally, General categories in the current budget like “Software Spending” were separated into more specific categories like “Accounting Software” and “Software Training Costs”. All of this information was put together in an excel spreadsheet separate from the main budgeting spreadsheet by the consultant. While Jeff didn’t have an exact answer to the question “How much does HHFI spend on technology every year” before, he now does. He can also now be more certain about technology budgeting for future years as he has a better grasp of the company’s current expenditures. Also, Jeff is currently trying to get a grant to establish a network to connect HHFI with remote locations and has stated that he has a much easier time explaining the organization’s technology spending because of the technology budget that was established. Jeff’s extensive experience with accounting in general, technology savvy, and annual review the company’s budget will help ensure that the technology budgeting process established will continue in future years. One issue that still needs to be addressed regarding the technology budget is that large portions of money are still being provided for certain programs with complicated technology needs such as WorkLink and while WorkLink maintains records of how that money is spend, Jeff doesn’t have that information in the technology budget. The consultant and Jeff also worked on creating a technology budget for 2009 based on the budget they got by filling in the budget template for 2008. How well the 2009 budget matches the actual technology expenditures that come up in 2009 will reflect the success of the technology budgeting project.

## **Recommendation 1. Switching from Blackbaud's CRM and Accounting Software to Cheaper Alternatives**

In 2008 HHFI spent around \$8,000 in maintenance and other for its CRM and accounting software. This money was paid to Blackbaud, the company that created HHFI's Raiser's Edge CRM as well as HHFI's accounting software, the Financial Edge. The consultant has examined the way HHFI uses both the Raiser's Edge as well as the Financial Edge, considered alternative products, and factored in switching costs. Based on these considerations, the consultant recommends that HHFI switch from Blackbaud's CRM to the Salesforce CRM and stop using Blackbaud's Financial Edge software and continue using QuickBooks and Excel for accounting.

### **1. Current Use**

Currently HHFI uses Blackbaud's Raiser's Edge to maintain records of potential donors to the organization. Basic information such as name, address, phone number, and the HHFI program they are associated with are stored for each potential donor. This information can easily be exported in various common formats such as a csv(comma seperatd value) file. HHFI(primarily Jeff) uses Financial Edge for accounting and budgeting purposes. Much of the accounting work is done in Excel and with the QuickBooks software and many times this work is copied into the Financial Edge.

### **2. Switching to Salesforce CRM**

The Salesforce CRM can be obtained by non-profits for no fee with 10 free licenses and 80% discounts on further licenses through Salesforce's charitable arm Salesforce.com Foundation. HHFI currently has less than 10 licenses with Raiser's Edge and only one person, Cindy the

Director of Annual Giving, uses the software on a regular basis. Salesforce is a professional software provider and has strong documentation for its product. Salesforce also has an online user community that could be a useful resource for information on the software. One concern with switching to Salesforce might be losing special functionalities that the Raiser's Edge provided. However, HHFI does not currently use any of the advanced features of the Raiser's Edge such as its ability to sync with the Financial Edge. The basic functionalities that are provided by Raiser's Edge such as the ability to store contact and donation information on potential donors is available in the Salesforce CRM. While, HHFI doesn't use special features the Raiser's Edge has, if it plans to do so in the future, the Salesforce's CRM is just as robust and has many similar advanced features like recording and tracking campaigns.

Because the data in Raiser's Edge is not too complex, transferring data from Raiser's Edge to the Salesforce CRM might not be very difficult and HHFI might be able to perform the task by itself with help from John or other consultants from Microrentals. However, in the case that the data transfer is not straightforward, HHFI could hire a consultant Salesforce to ensure the transfer is completed. Based on estimates from Salesforce's site as well as posts on Salesforce's user community, the consultant has determined that consulting fees might range anywhere from \$5,000 for smaller and less complex transfers to \$15,000 for large and complex transfers involving complex data relations or Enterprise Resource Planning systems. The consultant believes that if a Salesforce consultant is needed for the data transfer, the costs will be around \$5,000 because the data transfer should be straightforward. However, even considering the worst case that hiring a consultant for a one-time data transfer costs \$15,000, HHFI would still save money in the long-run as the \$15,000 would be offset in two years since the average software fees HHFI would pay to Blackbaud over two years would be \$16,000. Another cost that would come with switching to a different CRM is the time HHFI will have to spend to switch from Blackbaud to Salesforce. Finally, Salesforce.com is coming out with a new version of its software called Salesforce Nonprofit Edition in November 2009, specifically tailored for non-profits, education, and public sector organizations. The consultant recommends HHFI waits till this edition is released to switch to Salesforce since the organization might have to switch to the newer edition of the software when it comes out even if they switch to the current Salesforce CRM.

### **3. Alternatives to Salesforce**

In researching other CRM software, the consultant has come across other options HHFI can consider if the Salesforce CRM does not meet its needs. CiviCRM is one popular option for many non profit and advocacy organizations. It is an open-source constituent relationship management system that has the basic functionalities that Raiser's Edge is currently used for. More information can be found at <http://civicrm.org/aboutcivicrm>. MPower also came up as a viable option. MPower is another CRM program that has switched to an open-source model without licensing fees in March 2008. A video about MPower and its features is available at <http://www.mpoweropen.com/demo.shtml>. The consultant has noticed that many of the features available in MPower are also featured in Raiser's Edge.

#### **4. Dropping the Financial Edge**

Whether or not HHFI should drop the Financial Edge software should be determined by Jeff based on whether he think he will lose any significant functionality with the Financial Edge that he does not have with QuickBooks and Excel. While much of the \$8,000 the organization spends on software fees from the Raiser's Edge, it does not make sense to pay for the Financial Edge if Jeff does not use it and can get his work done with QuickBooks and Excel.

## **Recommendation 2. Leveraging Online Social Networking for the Community 2.0 Project**

The goal of the Community 2.0 project is to use technology to help community building efforts in the Tri-Boro area. The project is still being formed and initiatives being considered include helping disadvantaged individuals manage multiple commitments by providing them PDAs and training them on how to use the PDAs or building a web site where the Tri-Boro community can interact and communicate virtually on matters concerning the entire community including voting on and raising funds for civic projects. The project involves using technology, including the web, to not only impact individuals in the community but also the way individuals in the community interact with each other. The consultant sees much potential for leveraging social networking on the Community 2.0 site because of its socio-technical nature. Online social networking is a form of computer-mediated-communication usually done through a social networking service like Facebook or MySpace.

### **1. Leveraging Pre-existing Online Social Networks**

Facebook and MySpace are two of the biggest social networking sites currently in the United States. These online social networks, each consisting of over 115 million users, have had time to flourish. HHFI estimates that 36% of the Tri-Boro area has an internet connection in the home and it is likely that others use the internet at school or in public libraries. It is also likely, especially in schools and workplaces that many of these individuals have already networked and interacted over Facebook or MySpace. The Community 2.0 website would gain much if it could leverage the social online networks that members of the Tri-Boro community have already formed using Facebook's and MySpace's developer platforms.

Facebook's Facebook Connect platform and MySpace's OpenSocial platform allow third party websites to connect to Facebook or MySpace and access information on the social network the way an application on each of those sites could. In addition to simple authentication, these platforms allow a third-party-site such as the Community 2.0 site to get a user's information like his or her list of friends and their information. The Community 2.0 site will have to use Users and allow them to login to comment on, vote for, or donate to civic initiatives. Users on the site will have to be able to message or in some way communicate with each other and form connections. With regards to these connections, the Community 2.0 site can leverage the friends network that community members have on Facebook and Myspace. Through their respective platforms, the users can login to the Community 2.0 site through their Facebook or MySpace accounts and the site can then import a user's friends, check to see if they're in the Tri-boro area and add them to the user's "friends list" on the Community 2.0 page. Additionally, the site could allow a user to invite his or her friends in the Tri-Boro area to the Community 2.0 site with just a click. This feature could be implemented in the other direction as well as one could add users in the community that he or she communicates with on the Community 2.0 site to his Facebook or Myspace accounts. The consultant has experience developing on the Facebook platform and knows it to be well documented and developer-friendly. Both Facebook Connect and OpenSocial APIs are designed to be simple and have client libraries in many languages so the developers of the Community 2.0 site can easily integrate them into the site. In order to use Facebook Connect, a developer simply has to copy a snippet of code into his or her third-party application and the developer has complete access to the Facebook API. MySpace follows a similar protocol with OpenSocial.



## **2. Cultivating Social Networking on the Community 2.0 site**

Because of the interactive nature of The Community 2.0 site where users can participate in and discuss issues in the community, there is much room for fostering and allowing users to network and interact. In order to foster relations between users in the community, the site could implement a pseudo-social network with features like users with basic profiles including their location in the community and the ability to privately message or communicate with one another directly. Additionally, Facebook has shown that social networking can help increase the average time a user spends on a website. Implementing social networking features and building an online community on the site can increase community interest and participation in the Community 2.0 project. While such a website could be built by HHFI, services exist that allow people or organizations to create social networks. One such service, Ning allows users to create and manage social networks through a friendly interface. It allows users to create a completely customized social network and provides extensive features such as messaging, groups, blogging, chat, forums, personalization (for users in the network). Ning also allows users to develop applications on the Opensocial and Facebook Connect Platforms for their social networks so the Community 2.0 site could be set up in conjunction with a social network on Ning and leverage Facebook and Myspace through Ning. Alternatives to Ning like SocialGo and Webjam exist but neither is as developed and customizable as Ning.

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### **About the Consultant**

Arvind Shrihari is a sophomore in the Information Systems program at Carnegie Mellon University. He plans on earning an additional major in Computer science and getting his masters in Information Systems Management at the Heinz School before entering the workforce.

## Appendix A.

This is the technology budget template that the consultant worked with the HHFI CFO, Jeff Au, to create. The first row is a list of the programs at HHFI and the first column is a list of categories for technology expenditures.

		HHFI	4KIDS	WORKLINK	STRATEGIC PLAN	TBDF	OTHER	TOTAL
TECHNOLOGY								
	COMPUTER EQUIPMENT (INCL INSTALLATION)							
	NETWORKING EQUIPMENT							
	AUDIO VISUAL EQUIPMENT							
	SOFTWARE							
	SUPPLIES							
	REPAIRS & MAINTENANCE							
	PC							
	SERVER & NETWORK							
	SUBSCRIPTIONS & SOFTWARE MAINTENANCE							
	CONSULTANTS							
	RESEARCH & DEVELOPMENT							
	OTHER							
	TRAINING							
	ONLINE							
	OTHER							
	COMMUNICATIONS - TELEPHONE & INTERNET							
	WEBSITE							
	HOSTING & FEES							
	DESIGN & CONSULTING							
	CAPITALIZED EXPENDITURES (EXCEEDING \$1,000)							
	COMMUNICATIONS EQUIPMENT & SOFTWARE							
	COMPUTER EQUIPMENT (INCL INSTALLATION)							
	NETWORKING EQUIPMENT							
	AUDIO VISUAL EQUIPMENT							
	SOFTWARE							