

ACCUFUND CRM CUSTOMIZES SALESFORCE TO IMPROVE NONPROFIT EFFICIENCY

UNITED NEIGHBORHOOD CENTERS OF NORTHEASTERN PENNSYLVANIA

The United Neighborhood Centers of Northeastern Pennsylvania (UNC) is a non-profit agency dedicated to meeting the needs of local low-income families, seniors, and youth, while also empowering them to attain self-sufficiency. To achieve this goal, UNC oversees six programmatic departments (Community Services, Child Care, Youth, Older Adults, Community Education & Revitalization, and Community Health) and a Housing/Community Development Corporation. Through this diverse programming, UNC uses an innovative wrap-around approach to address the emerging needs of the community it serves. With its beginnings dating back to 1923, UNC has become one of the largest, and longest operating, nonprofit organizations in the region.

THE BUSINESS CHALLENGE

To manage fundraising for its numerous programs, the United Neighborhood Centers of Northeastern Pennsylvania was using a well-known fundraising management software system for nonprofits that it found to be too complicated.

“That system had so many bells and whistles, it was frustrating,” explained Mary Carroll Donahoe, director of development at UNC. “Getting a report together was such a challenge, and I never trusted it to be accurate. Since we were paying a huge amount of money each month for a system that was not easy or reliable, we started to question whether we should continue to use it.”

UNC also found that because the fundraising management system wasn't compatible with its accounting system, donor gifts had to be entered twice --- once in the fundraising management system and again in the accounting system --- a time-consuming situation ripe for inconsistencies.

“It was crazy having to enter the gift in two separate systems,” said Donahoe.



ACCUFUND INTEGRATES WITH SALESFORCE

When UNC requested a recommendation from AccuFund, their trusted accounting system vendor since 2011, Salesforce, a cloud-based fundraising and constituent relationship management (CRM) solution, was suggested. AccuFund Accounting Suite easily integrates with Salesforce via its AccuFund Connector. With the AccuFund Connector, UNC is able to unite all the functions of its accounting system with Salesforce. AccuFund CRM optimized and customized the core components of Salesforce into a reliable donor database to improve the organization's development, management and fundraising activities. This now provides the organization with a complete nonprofit management solution and UNC eliminates the need for double entry on every donor transaction.



A WORLD OF PRAISE FOR ACCUFUND

AccuFund CRM optimizes and customizes a Salesforce donor database to improve an organization's development, management and fundraising activities.

“AccuFund CRM customized Salesforce to meet our needs. Now, whenever I enter donations into Salesforce, it appears in the AccuFund Accounting Suite so the financial department can see activity immediately,” explains Donahoe. “We’re no longer taking the extra step of re-entering gifts for accounting.”

UNC finds that the most significant benefit of Salesforce is its ease of developing reports. Each year, UNC has five to six special events and three to four fundraising campaigns all requiring specific reports for production and pledged dollars. For each campaign and event, Donahoe needs to assemble a report for the UNC board of directors and leadership, highlighting fund allocation and revenue.



“With our previous fundraising management system, there were multiple tiers of reporting for every gift and it was mind-boggling to put a report together,” explained Donahoe. “I would get so frustrated, I would call the vendor for help, but had to get in a queue. Then, every time I talked to them, I would get a different answer, so I still wouldn’t trust the report I generated was accurate.”

“With Salesforce, it’s very simple,” continued Donahoe. “I can quickly and easily get an accurate report on a particular campaign or event, with the accounting on it very complete and organized. There’s no more aggravation!”

AccuFund CRM customized Salesforce in a way to allow Donahoe to save time with generating her fundraising reports. She estimates she’s saving an hour or more per report.

“With the multiple campaigns and events, I’m saving at least nine hours in reporting alone, but I value the aggravation saved even more,” said Donahoe. “There was additional time spent being frustrated with the other system that impacted productivity.”



“My compliments to Sarah Finley on the AccuFund CRM team. She’s the best!” said Donahoe. “She set me up so beautifully and walked me through the whole process; it was very seamless. Whatever bumps we had, she ironed them out real fast. She’s fantastic to work with.”

In closing, Donahoe stated, “AccuFund CRM helped customize Salesforce into a logical, efficient system providing superior data entry, navigation and reporting to help UNC improve its overall management.”

TO LEARN MORE ABOUT ACCUFUND

Visit our Website at www.accufund.com, call your local reseller, or contact our Sales Department at 877-872-2228 ext. 215. We would be pleased to discuss this case study, explain the benefits of AccuFund for your fiscal department, and put you in touch with a local reseller certified to install and support the **AccuFund Accounting Suite**.

AccuFund CRM optimizes and customizes Salesforce into a donor database that meets the unique needs of an organization; improving development, management and fundraising activities. For information about customizing your Salesforce solution, contact Sarah Finley at sarahf@accufund.com.