

Background

Habitat for Humanity San Francisco (HHSF) is a volunteer driven organization whose mission is to provide affordable ownership housing for low-income families and individuals in the city of San Francisco. HHSF volunteers work alongside families in need of adequate housing to build and renovate homes.

HHSF successfully finished its first home renovation in 1996 and since then has completed a total of 11 homes in one of the most expensive housing markets in the United States. Continuing its mission, HHSF recently embarked on its largest project ever to build eight condominiums housed in a five-story structure. The ambitious project will be HHSF's largest to date and when completed is expected to be the tallest Habitat structure built anywhere in the world!

Problem

The success of HHSF is highly dependent on support from local businesses, individual donations of money and material, and volunteer labor. HHSF staff are faced with a unique challenge to not only manage the various activities and projects taking place on any given day, but also to keep track of its vital donor and volunteer information.

Historically HHSF managed these functions through a software program created by Habitat International. Initially, the program addressed the organization's needs. However, HHSF was growing fast and with that growth came new volunteers and an expanding range of operations. With no technical support and often outdated user manuals, HHSF staff resorted to managing and tracking

housing projects, donor, volunteer and family information in disconnected – and often paper-based – ways.

"We quickly recognized that while HHSF staff were very efficient within their own projects, we weren't taking advantage of the vast amount of intelligence we gathered on donors and volunteers. As a result, we were not leveraging the full value of the relationships with our constituents, due to these inconsistent methods of gathering and maintaining that valuable information," recalled Sara Matson, development director of HHSF. "Furthermore, we were limited in our ability to attract and retain new donors largely because we could not analyze the effectiveness of the organization's previous campaigns and special events."

Solution

Two years ago, HHSF implemented Exceed! Premier, a comprehensive fundraising and donor management software solution, to streamline the organization's operations. Exceed! Premier provides HHSF staff with a centralized database to organize its most critical information in a consistent and easy-to-understand format. As a result, HHSF is not only managing its most critical donor history and preferences, but also its volunteers to better understand their unique skills and interests. Additionally, with Exceed! Premier, HHSF is equipped to manage information on families interested in applying for homeownership and those families that have applied.

Because Exceed! Premier captures vital information about and links between donors, volunteers, corporate sponsors and foundations, HHSF can now streamline and target mass mailings, resulting

in more consistent and effective communications. Most importantly, HHSF is better equipped to run reports on its fundraising campaigns, mailings and special events in order to track the organization's fundraising success. For example, HHSF can run reports that analyze a fundraising campaign based on specific criteria such as geographic location. Finally, because Exceed! Premier integrates with QuickBooks®, HHSF can seamlessly transfer gift, pledge and grant information between the two programs – saving time and reducing inaccuracies associated with duplicate data entry.

Results

Using Exceed! Premier, HHSF is saving time on tasks associated with managing donor, volunteer and grant information and is leveraging the additional time to develop stronger relationships with its many constituents. Today HHSF is seeing a dramatic increase in financial support and an increasing willingness of volunteers to support the organization, allowing HHSF to expand building projections.

"Since the implementation of Exceed! Premier, we estimate a savings of anywhere from five to ten hours a week on administrative tasks associated with fundraising and donor management," added Matson. "As a result we have more than doubled our staff's operating efficiency and have been able to spend more time focusing on HHSF's primary mission."