

Transforming A Nonprofit's Legacy Technology into a User-Friendly and Accessible Platform



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Advocacy organizations thrive when they harness the power of volunteers to accomplish their mission. With 37 million members and 65,000 active volunteers, our nonprofit client has a tremendous base of support. Our client's volunteers deliver important programs such as tax preparation, child literacy, and driver safety.

Tens of thousands of people are committed to helping our nonprofit client fulfill its mission to "...champion positive social change and deliver value through advocacy, information, and service", but aligning technology and operations to support those volunteers can be daunting.

The client chose Acumen Solutions to upgrade their volunteer management systems so that volunteers could spend more of their time and skills serving the needs of their clients and less time on administration. Ultimately, the Volunteer Technology Modernization (VTM) project helps the client get the most from volunteers who want to give back to their communities.

The Challenge

Large organizations are not strangers to technology and business processes that are separated across divisions, programs, and functions. These silos often make simple things more time-consuming and complex, impeding the ability of the establishment to achieve its primary objectives.

In our client's case, systems that controlled membership, reporting, analytics, expenses, and program operations lacked a centralized interface. For example, since volunteers for all of the programs, including Driver Safety, were managed in a separate application, recruiters from other programs had no visibility into that pool of resources. A volunteer shortfall had to be addressed through emails, meetings, contact record exports and phone calls as there was no efficient way to "share" volunteers across different programs.

From an associate's perspective, volunteers had voiced frustrations with system functionality that was either half-useful or nonexistent. Examples include the need for paper-based expense reimbursements, tracking recruits on spreadsheets, the inability to record time spent on volunteer activities, and difficulty ordering the materials necessary to provide services to their customers. Our client was also potentially losing volunteers who might not volunteer the next time they are called due to their frustration and time lost navigating an overly cumbersome and dated system.

With increasing levels of adoption of mobile devices among the older demographic of our client's membership, the organization knew it had to be on a path to make the volunteer applications accessible through an easy-to-use, mobile experience. Salesforce1 provides an ongoing capability for providing functionality as the older demographic migrates to mobile devices.

At the executive level, extracting data from the legacy system was time consuming and did not enable decision making without difficulty. Executives could measure productivity or effectiveness across all programs, but it required manually compiling reports from each system, which could take weeks. Analytics that weren't available in a meaningful format couldn't be converted into actual business intelligence. In addition, the expense to maintain the legacy system, combined with the amount of time required to stand-up new programs in the system, led our client to seek a more streamlined, cost-effective, integrated, and feature-rich solution.

The Solution

Designing the System

Guided by Acumen Solutions, our client began a process to modernize and extend their volunteer management systems. As with all of Acumen Solutions' enterprise clients, the project team reviewed the business strategy with the client and discussed their vision for an ideal system. Rather than simply reviewing how technology could be modernized, the team took time to discuss the positive impact that improvements to operations, communications and management would benefit the organization. This strategic approach enabled the project team to plan the workflow and technology that would create the most value for our client. It also provided them with a full set of objectives and metrics that could be used to measure the impact of the project.

Cloud Platform

Acumen Solutions implemented the solution on the Salesforce platform to take full advantage of the functionality, extensibility, and interoperability of that platform. Salesforce's front-end interface allows volunteers and managers to effectively use the system on desktops and mobile devices. It also can integrate with our client's existing systems for functions such as data warehousing, reporting, membership, access control, and fulfillment. Some of the key features of the solution include:

Single Interface: Through a single sign-on (SSO), our client's staff and volunteers gain access to the volunteer portal. The permissions for the system provide the functions available to that user based on their program participation, management level or role. The portal simplifies access to volunteer scheduling, activities, work logs, and expense tracking.

Connections to Enterprise Applications: The reach of our client's volunteer programs meant that the volunteer portal would need to interface with many existing applications. Historical reporting and analytics are handled through an enterprise data warehouse The Solution 4 © Acumen Solutions, Inc. www.acumensolutions.com application. Fulfillment for training materials came from a third-party publishing house. Connections to our client's membership database were handled through a single sign-on tool and application interface. These integrations provide several benefits to the client. First, they protect the previous investments made in these complex applications. This minimized the impact of the new volunteer system on other technology. Second, they streamlined operations by automating connections with systems that required separate authentication or batch processes for synchronizing data.

Increasing Volunteer Impact

The new system includes all volunteer opportunities within the client organization and users can be presented with other ways they can use their time to benefit their community. Based on their skills, geography or interests, volunteers can register within the portal for additional activities. A volunteer instructor for driver safety who has extra time can now easily volunteer to visit the state legislature to lobby his representatives. Ultimately, volunteer interests can be shared between the client's volunteer programs.

Workflow Management that Streamlines Operations

Workflow for management was also implemented within the system so that more complex programs can be fully managed within the portal. One such program offers free tax preparation in more than 5,000 locations for people 50 and over who can't afford a tax preparation service. The

system enables transparency into the volunteers' expenses, all of which had previously been entered after the tax season ended each year.

Online Training and Speedy System Adoption

Training and training management of volunteers for their roles in programs were also brought online through the integration of Cornerstone for Salesforce, a robust learning management system. This helps onboard volunteers, as well as improve their skills, as they become more involved in our client's programs. Operational expenses were decreased and convenience for volunteers increased as the client hadn't utilized a true Learning Management System previously.

Additionally, Driver Safety now leverages Cornerstone for Salesforce that enables their instructors to schedule and display options on the website's course selection page for participants to find and sign-up for. With a program that reaches 65,000 volunteers, an effective roll-out for our client was critical.

Acumen Solutions worked with our client to define a change management strategy that was executed at the launch of the portal.

Key staff were used as beta testers and were trained on the entire system so that they could subsequently train volunteer managers to on-board other volunteers. This "train the trainer" approach was cost-effective for the client and also helped staff and volunteer managers become familiar with the system more quickly.

Ongoing, Staged Improvements

The vision developed at the start of the project was used to plan an enterprise roadmap for the system. This vision roadmap detailed the

improvements and extensions of the system that would be undertaken following launch. Ongoing support and extensions are currently provided through the Acumen Solutions development team based in Cleveland, Ohio. Future stages will include additional functionality that matches volunteers with “best fit” opportunities based on their skills, availability, and location.

Project Outcomes

Our client’s stated mission is to “enhance the quality of life for all as we age” and they do this by strengthening communities and fighting for issues that matter most to families and volunteers who play a crucial role. The new portal is critical to this mission. Volunteers are better engaged and supported. Members can now connect to various applications and business functions seamlessly. This saves them time and gives them a better view of how they can help their communities. Key operational improvements include volunteer expense reimbursement in an average of three days.

Our client’s business partners established the following adoption areas for success to poise our client to recruit younger and more diverse volunteers as well as empower existing volunteers.

- Improve the volunteer lifecycle user experience
- Increase training for volunteers
- Improve program staff time efficiency
- Increase business self-service

Each month our client’s Executive Steering Committee and business partners review adoption metrics to gauge progress towards these goals. The table below highlights some of the most recent adoption metric values aligned with each measure of success.

Measure of Success	Adoption Metric	As of June 9
Improve User Experience	# of users logged in	27,560
Increase Training	# of courses completed	57
Improve Staff Time Efficiency	# of prospects converted to volunteers	700
Increase Business Self-Service	# of days to expense reimbursement payment	4.5

The client chose Acumen Solutions for this vital transformation because they know that when it comes to cloud technologies, one thing matters most: experience delivers success.

Why Acumen Solutions?

Clients choose Acumen Solutions for one simple reason: our experience delivers success. Joining forces with our clients, our teams of strategists, subject matter experts, and engineers solve problems that can't be fixed by technology alone. As a Salesforce Global Strategic Partner, Fortune 500 companies trust us to build solutions that grow revenue and strengthen customer relationships. Our groundbreaking solutions in the public

sector streamline operations and improve productivity.

We apply the same expertise to our unparalleled social responsibility program, generating sustainable impact across our local communities.

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