

# CASE STUDY

*What Works: Goodbye Spreadsheets,  
Hello Data Simplicity.*



# SMALL NONPROFITS DREAM BIG

**What Works:** *With only four staff members and an ever-growing data management challenge, The Greenway Foundation finds relief with a CRM tool that can slice, dice and multi-task like nobody's business. See how they achieved balance in the midst of data disarray while managing an increasingly complex network of constituent relationships.*

Since 1974, the Greenway Foundation (the Foundation) has led the effort to enhance and preserve the South Platte River and its tributaries throughout the Denver metropolitan area. The Foundation does this by creating environmental enhancements; holding property, when needed, in conservation easements; using the river as an outdoor and historical learning resource; hosting free cultural events promoting the relationship between the river and music, art and theatre; providing youth employment opportunities, and promoting good stewardship through educational programs.

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## INTRODUCTION

At the end of the day there's no doubt about it – successful fundraising comes down to two things: relationships and data. Each depends on the other. The data your organization has on existing and prospective donors and the systems you have in place to manage it are the determining factors in how quickly and effectively you can carry out your mission – and adapt your strategy when trial and error tells you what's working and what's not. Most traditional donor databases are built either for major donor fundraising or for direct mail. In either case they fail miserably at tracking and accounting for multichannel behavior such as interacting with an organization via email, direct mail, social media, etc.

As a growing nonprofit with limited resources, The Greenway Foundation needed a straight answer when it came to knowing what worked. They could no longer rely on spreadsheets and manual records to track their constituents and find the best way to engage and campaign for their cause; these tools painted a limited, fragmented picture of their constituents and managing them wasted staff time.

Today's modern donor is not just giving through multiple channels; they volunteer, advocate, participate in and, for some organizations receive services, as well as champion the cause to others. To be a successful

fundraiser both online and offline, The Greenway Foundation knew they needed a CRM / donor management system that could help them track and manage their relationships in one place and get a complete view of all constituents and their activities with the organization. They turned to Convio's Common Ground™ to start seeing their data and supporters from a more tactical vantage point.

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## THE CHALLENGE

With a small, four-person staff, The Greenway Foundation faced a big challenge. They struggled to coordinate communications to their supporters because they housed contact information in 47 different spreadsheets. “One person would have a bunch of spreadsheets for events. And another person would have a list of children and teachers for our educational programs. And another person would have a government relations spreadsheet. And then there was a general spreadsheet for donors and people who were interested in the organization as a whole,” said Lisa May, Development Director, Greenway Foundation. “You can imagine how much duplication there was.”

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The organization had no centralized database or any other way to ensure that the right communications went to the right supporters. The organization sometimes hesitated to send communications for fear of sending duplicate messages or sending the wrong communication to the wrong supporter. The Foundation would never, for example, want a fundraising appeal to accidentally go to a child or teacher because the categories had been mislabeled.

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## THE GOALS

The Greenway Foundation staff turned their attention to the following goals as they searched for a solution to their challenge:

- Having a single view of all of their contacts
- Eliminating duplicate records
- Being able to target communications to appropriate audiences
- Cultivating donors
- Finding a web-based solution that required no software to install and no expensive hardware to maintain

# IN SEARCH OF A BETTER VIEW

Effectively manage all data—not just donors—in a single view

The Greenway Foundation needed a 360° perspective of all of their constituents, not just donors. And they needed to track more than just fundraising efforts. By consolidating all of their spreadsheets into Common Ground, they are now able to link all communications—whether one-to-one emails, phone calls, bulk email campaigns, or direct mailings – to each individual record for tracking and segmentation.

## CONNECTING ALL THE PIECES

**Activity History** Log

Subject

Email: Thanks for your rece

Email: Thanks for the gene

Email: Great seeing you las

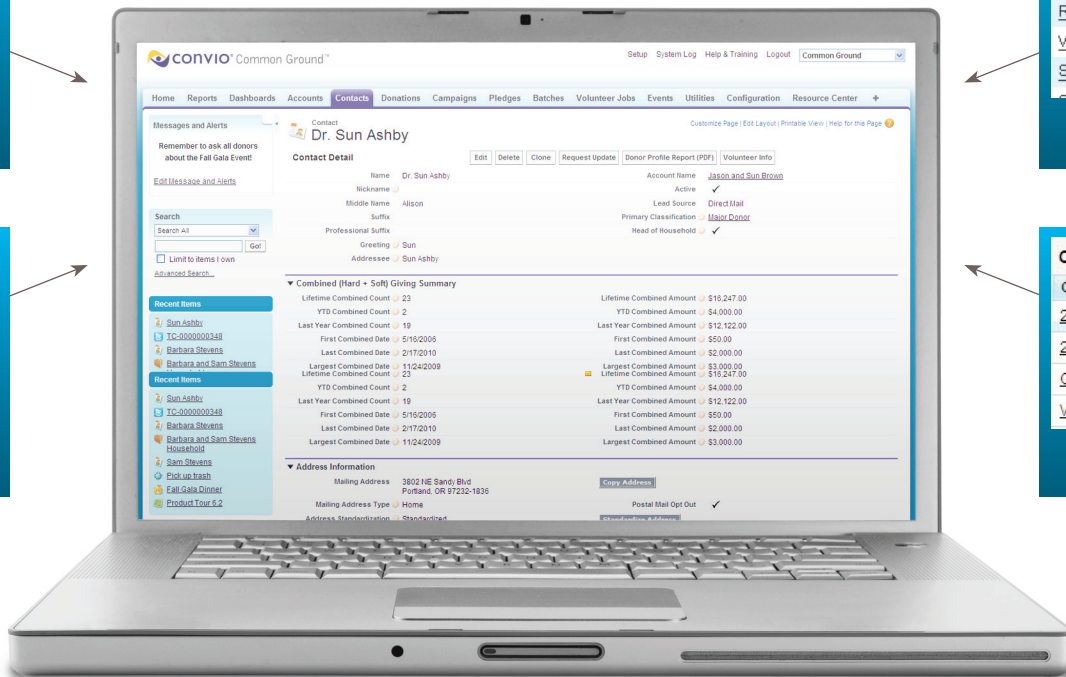
Email: cool demo featuree

**CONTACT HISTORY**

Sun Ashby

- Acme Corporation (E
- Aimee Clark (Friend
- Bob Evans (Co-work
- Jack Baird (Friend)
- Jason Brown (Spous
- Paul Somebody (Co
- Tommy Soapp (Frie

**RELATIONSHIP TRACKING**



**Shift Assignments**

Volunteer Job Shift

Hand out blankets: 11/21/2

Run / Walk / Ride Event: 01

Volunteer Event at Church:

Spring Clean Up Event: 03/

**VOLUNTEER TRACKING**

**Campaign History**

Campaign Name

2007 Campaign

2006 Campaign

Gala Event

Volunteer Event at Church

**CAMPAIGN HISTORY**

Common Ground allows you to keep track of your constituents, their networks, and how all their actions toward your cause are interrelated. Common Ground is a complete fundraising and donor management solution that helps you track the details of every relationship in a single database – from prospects to donors, staff to volunteers, partners to vendors, board members and event participants.

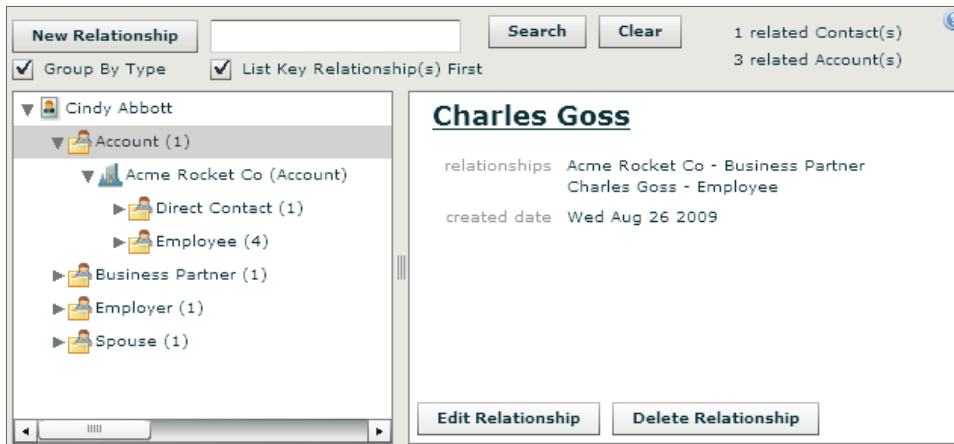
# RELATIONSHIPS ARE THE CORNERSTONE OF AN ORGANIZATION

*Track and coordinate constituents, their networks, and their impact*

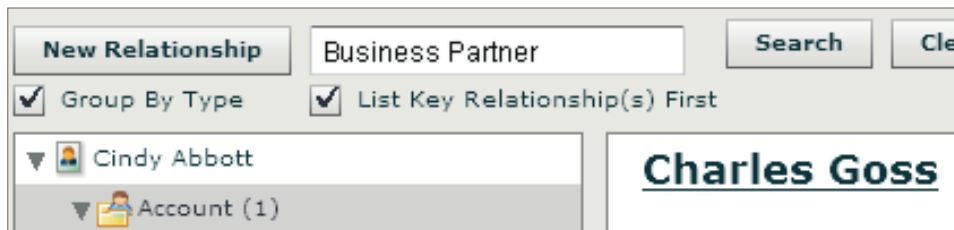
The Greenway Foundation knew that true relationship management was not just about shepherding a relationship with an individual donor; it's about coordinating all constituents' relationships with one another as well. Common Ground allowed them to keep track of their constituents, their networks, and how all their actions toward the Foundation's cause were interrelated.

In addition to fully understanding each individual constituent's relationship to the organization, The Greenway Foundation is now able to begin to link each constituent's record to households and organizations and define relationship types to create a more complete profile of all of their contacts and supporters. Common Ground's householding feature links two or more constituents together as a "household" allowing The Greenway Foundation the capability to share mailing addresses and compile household donation summaries.

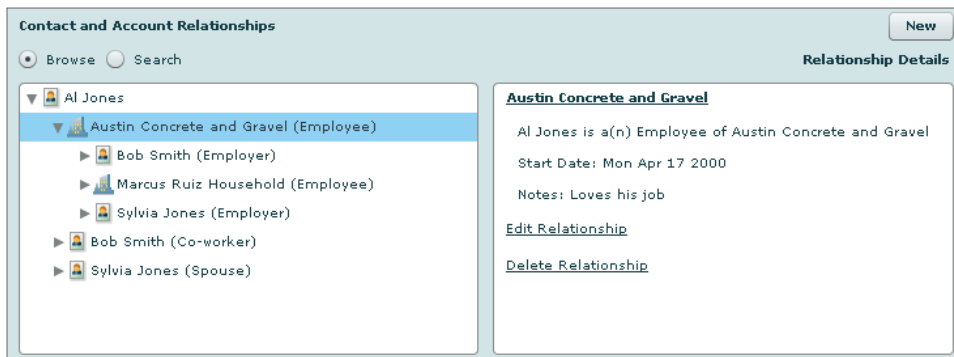




With Common Ground, you can see household relationships as well as: employer to employee relationships, constituent to constituent, or board member to target major donor. Relationships are king, and with Common Ground you can see all of their many layers.



With Common Ground, you can customize the types of relationships available to associate with individuals or organizations.



With Common Ground, you can query an individual contact for known relationships, or search the entire database for contacts with a specific type of relationship.

## SEIZING THE DAY – AND THEIR DATA

### for Tailored Constituent Conversations

The Foundation’s staff members also are now able to do things they could never imagine doing before implementing Common Ground. For example, staff members had sent email newsletters only to their specific list of children and teachers because they were concerned that the newsletter would go to some people multiple times if the contacts were on multiple lists. Now, they are able to customize and send newsletters to targeted contact categories. The Foundation also is beginning to track contact information so that they can tailor their communications and appeals in the future—something they were unable to do when they were juggling 47 spreadsheets.

| Criteria Filters                              |       |  |
|---|-------|--|
| Action  | Index | Criteria   |
| <a href="#">Edit</a>   <a href="#">Delete</a> | 1     | Contacts who have given at least 1 donation(s) with a contact role of Donor                                    |
| <a href="#">Edit</a>   <a href="#">Delete</a> | 2     | Contacts who have not given at least 1 donation(s) with a contact role of Donor between 1/1/2010 and 3/26/2010 |

Criteria Formula: [Edit Formula](#)  
 Example Criteria Formula: (1 AND (2 OR 3))

With Common Ground, you can target supporters easily using a common-language segmentation criterion as well as identify individuals using any data fields, prior campaign participation, donor classification, relationships or aggregate donation totals.

“Now we can start using board members and volunteers to do some solicitations because we’re able to track interests and affinities and giving history in one place. We can now tailor everything we do,” said May.

| ▼ Giving Summary            |                                     |                              |                                     |
|-----------------------------|-------------------------------------|------------------------------|-------------------------------------|
| Lifetime Transaction Count  | 9                                   | Lifetime Transaction Amount  | \$3,021.00                          |
| YTD Transaction Count       | 7                                   | YTD Transaction Amount       | \$2,896.00                          |
| Last Year Transaction Count | 1                                   | Last Year Transaction Amount | \$75.00                             |
| First Transaction Date      | 5/16/2006                           | First Transaction Amount     | \$50.00                             |
| Last Transaction Date       | 10/7/2009                           | Last Transaction Amount      | \$1,001.00                          |
| Largest Transaction Date    | 10/7/2009                           | Largest Transaction Amount   | \$1,001.00                          |
| Active Sustainer            | <input checked="" type="checkbox"/> | Open Major Gift              | <input checked="" type="checkbox"/> |

With Common Ground, you can automatically calculate cumulative giving summaries for individual, household and organization records.

“We’re able to track interests and affinities and giving history in one place. We can now tailor everything we do.”

—Lisa May, Development Director, Greenway Foundation

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## CONCLUSION

The Greenway Foundation knew that their ability to strengthen their supporter relationships lay in their ability to know, understand, and interconnect those people at the end of the phone call, email, or website click. With Common Ground as a hub to keep them plugged in to each appropriate point of interaction both online and off with consolidated constituent views, they no longer risk missing the mark with their donor communications.

After spinning their wheels wrangling multiple spreadsheets each time they needed the big picture view (or any meaningful data at all), The Greenway Foundation's staff were done with data disarray. By providing one centralized place for managing data and viewing interactions, Common Ground helped them streamline their day-to-day processes, work more efficiently and give more people access and ownership of the mission without worrying about incomplete data or duplication.

And finally, staying competitive and adaptable in an environment of limited donor dollars and complex, multichannel constituent interactions requires not only that your approach be well coordinated among the members of your organization, but also that it be flexible—that you are able to tell, in a timely manner, what's working and what's not, and be able to change your strategy accordingly. Common Ground's tracking and reporting allows The Greenway Foundation to do just that, giving them clarity in their daily work toward the mission and a better understanding of all their data and relationships for a more strategic, unified approach to donor management.

To learn more about Common Ground, visit [www.convio.com/cg](http://www.convio.com/cg).



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## CONVIO COMMON GROUND™

Common Ground is a CRM system designed for nonprofits that moves beyond the traditional donor database. Common Ground provides nonprofits with key features for managing donations, including pledge gift management, batch gift entry, major gift fundraising, relationship tracking, fundraising events and more. It also helps nonprofits manage other types of interactions – including volunteer tracking to organize multi-shift volunteer jobs, then easily find available volunteers in the database whose availability and skills match upcoming shifts. Because Common Ground is built on the Force.com platform from Salesforce.com it can be extended with clicks, not code, allowing nonprofits to easily customize fields, page layouts, workflows and access privileges and get all of the advantages of a reliable, cost-effective IT solution while avoiding the headaches of managing technology onsite.

To learn more about Common Ground, visit [www.convio.com/cg](http://www.convio.com/cg).

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## ABOUT THE GREENWAY FOUNDATION

The Mission of the Greenway Foundation is to advance the South Platte River and the surrounding tributaries as a unique environmental, recreational, cultural, scientific and historical amenity that uniquely links our City's past and its future. This mission will be accomplished by creating ongoing environmental and riparian enhancements; holding property, when needed, in conservation easements; utilizing the River as an outdoor and historical learning resource, hosting free cultural events promoting the relationship between the River and music, art and theatre, providing youth employment opportunities, and by promoting good stewardship through hands-on educational programs.

To find out how you can help, visit [www.greenwayfoundation.org](http://www.greenwayfoundation.org).

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## ABOUT CONVIO

Convio is the leading provider of on-demand constituent relationship management (CRM) software and services that give nonprofit organizations a better way to inspire and mobilize people to support their organization. Convio Online Marketing, the company's online marketing suite, offers integrated software for fundraising, advocacy, events, email marketing and web content management, and its Convio Common Ground™ CRM system helps organizations efficiently track and manage all interactions with supporters. All Convio products are delivered through the Software-as-a-Service (SaaS) model and are backed by a portfolio of best-in-class consulting and support services and a network of partners who provide value added services and applications focused on the unique needs of nonprofit organizations. For more information, please visit [www.convio.com](http://www.convio.com).

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