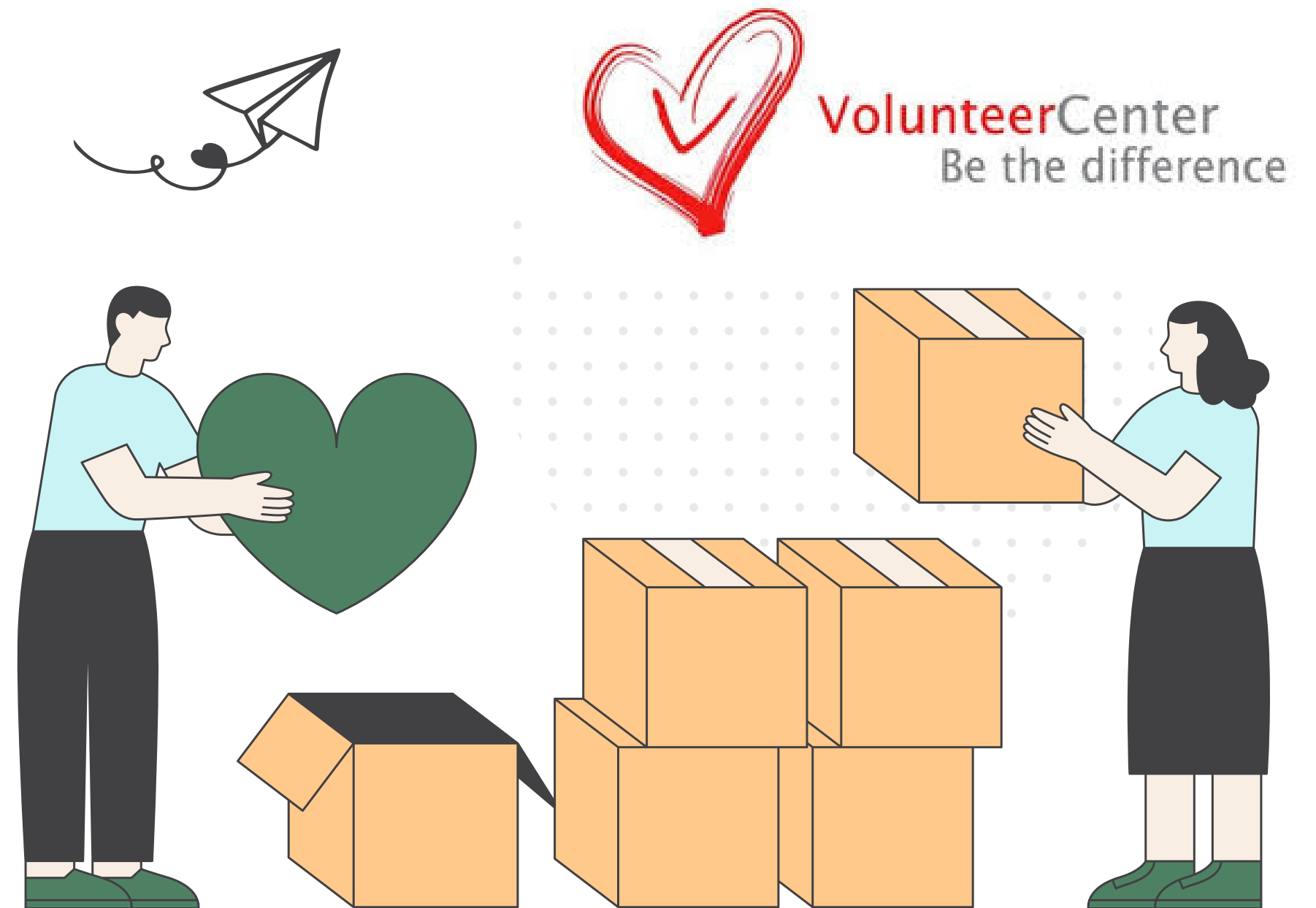




SANTA CRUZ VOLUNTEER CENTER PROJECT

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AGENDA



01

Overview

02

Business
Flow

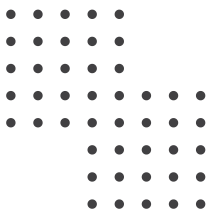
03

Demo
Solution

04

Project
Management

OVERVIEW



Initial Meeting with Sponsor

Learned about SCVC's current tools and pain points with DonorPerfect.

Team Split & Platform Research

Half the team explored ways to improve DonorPerfect, the other half researched alternatives.

Platform Demos & Evaluation

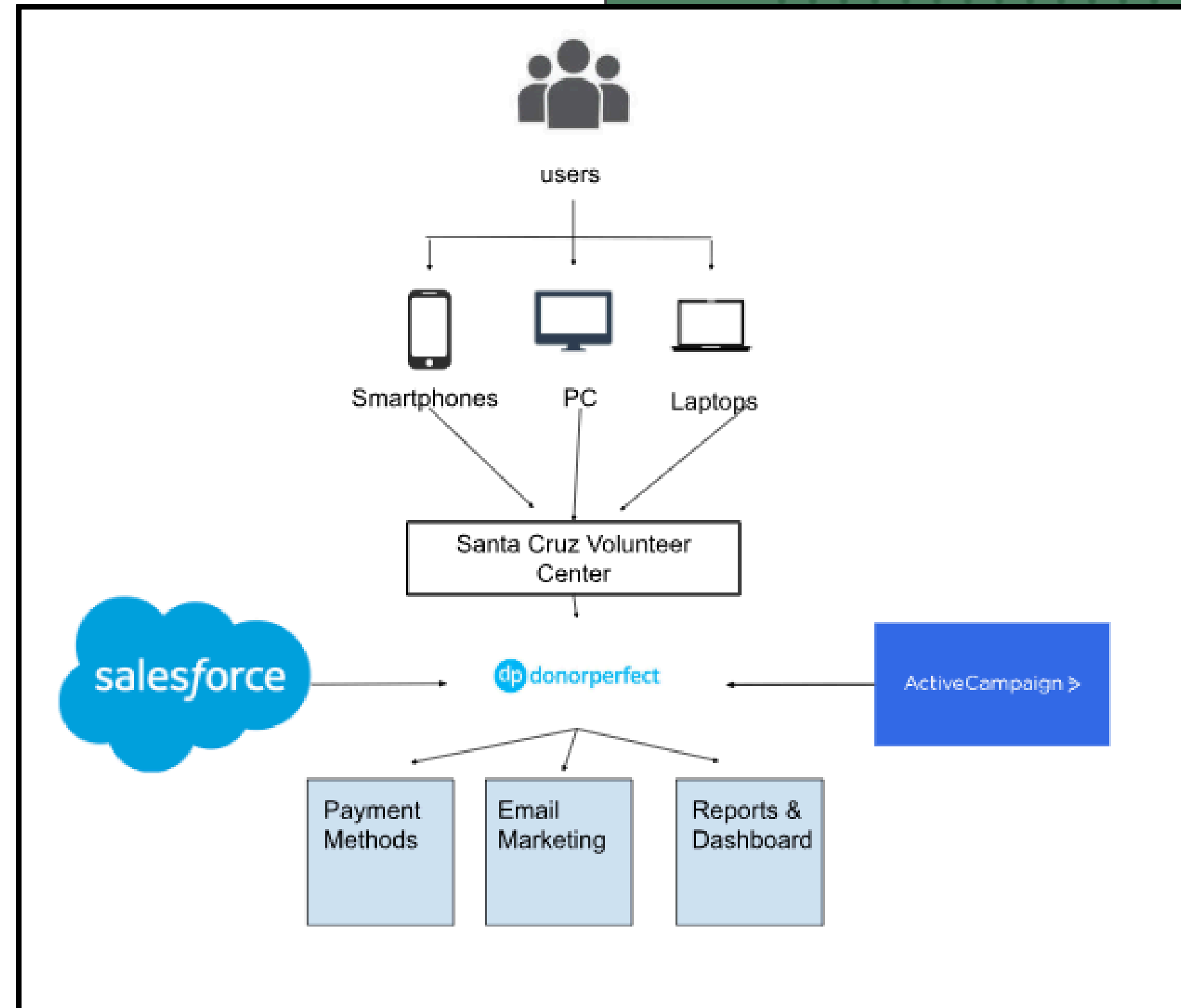
Compared platforms like Givebutter, DonorDock, and Bloomerang to SCVC's needs.

Presented Our Findings to Sponsor

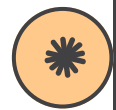
Shared our recommendations and walked through potential solutions for donor and volunteer management.

BUSINESS FLOW

- Users - SCVC Team
- Platform - DonorPerfect
 - Integration w/ Salesforce & Active Campaign
 - Record physical and online donations
 - Manage donor information
 - Create reports of financials

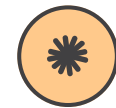


DEMO SOLUTION



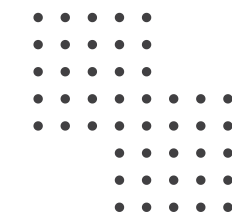
THE PROBLEM

Santa Cruz Volunteer Center is struggling with DonorPerfect (current CRM system they are using) due to outdated design, difficult reporting, and poor volunteer-donor integration.



INTRODUCING THE SOLUTION

We evaluated several platforms and found DonorDock to be the best fit due to its modern interface, unified donor-volunteer tracking, built-in automation, and easy integrations.



The DonorDock Platform

A 360° view of your constituents.



Donor Management

Keep track of unlimited contact records with DonorDock's easy-to-use nonprofit CRM, designed to grow with your organization. Effortlessly manage donor and supporter information, track engagement and outreach—all in one secure, centralized platform.



Donor Outreach

Strengthen donor relationships with targeted email and text messaging tools that make it easy to send personalized, impactful messages to your supporters. Gain valuable insights into donor engagement, track key metrics, and take meaningful steps to foster lasting connections.



Online Giving

Accept donations with customized online giving pages designed to reflect your nonprofit's unique branding and mission. Best of all, DonorDock never charges an additional platform fee for donations raised, ensuring every dollar supports your cause.

The Solution

DonorDock provides a comprehensive solution to help nonprofits overcome these challenges and thrive.

Designed to simplify your organization's day-to-day work, DonorDock empowers your team to spend less time on manual tasks and more time on engaging donors, building lasting relationships, and driving your mission forward.

DonorDock eliminates the need for multiple systems, whether it's tracking donations, automating communications, or organizing campaigns, DonorDock equips you with everything you need to save time and reduce stress.



Centralized Data

Track and integrate all your constituent information in one place, so nothing gets lost or forgotten.



Robust Features

All the tools you need to manage donors, fundraising, and communications in one simple platform that's built to grow with you.



Affordable

Designed for small and mid-sized nonprofits, DonorDock offers a price that works for your budget.



Easy-to-Use

Loved by people of every age, computer skill level, or role. DonorDock was voted the "easiest to use" nonprofit software by nonprofit leaders.

How we're different

Built for simplicity without sacrificing capability



Unlimited Contact Records

DonorDock offers unlimited contact storage, allowing nonprofits to grow their supporter base without worrying about reaching a limit or incurring extra costs.



Free Support

DonorDock offers free, accessible customer support to ensure nonprofits have the help they need without worrying about extra charges.



No Contracts

DonorDock provides flexibility with no long-term contracts, giving nonprofits the freedom to use the platform on their terms without being locked in.



Transparent Pricing

DonorDock is designed with small and medium-sized nonprofits in mind, offering transparent and affordable pricing plans without hidden fees or complicated tiers.

100+ Features

 **One simple place to track data and get organized.**

Many software options are confusing, bloated, and expensive.

We've chosen a different path.

DonorDock is designed to simplify your organization's day-to-day work so you can focus on the key things that will actually lead to growth.

DonorDock helps you know exactly what you need to do next. It's designed for everyone in your organization, regardless of computer skill level.

With DonorDock, you'll finally have one reliable place to track data and have peace of mind, knowing that opportunities are not falling through the cracks.

Automations

Trigger tasks, emails, texts, and automate data management based on incoming gifts, activities, and more.

Text Messaging

Bulk send, conversations, scheduling, and personalization all tied back to contact records, asks, and campaigns.

Activity Tracking

Track event tickets, volunteers, grants, sponsors, members, meetings, phone calls, emails, and more.

Email Marketing

Drag and drop email editor, tracking, scheduling, sending, and templates.

Integrations

Thousands of integrations for finance, marketing, signups, events, giving, and more.

Security

SOC II rated security to keep your data safe and private.

Task Management

Collaborate with others, and manage tasks easily so you can work more efficiently.

Custom Reporting

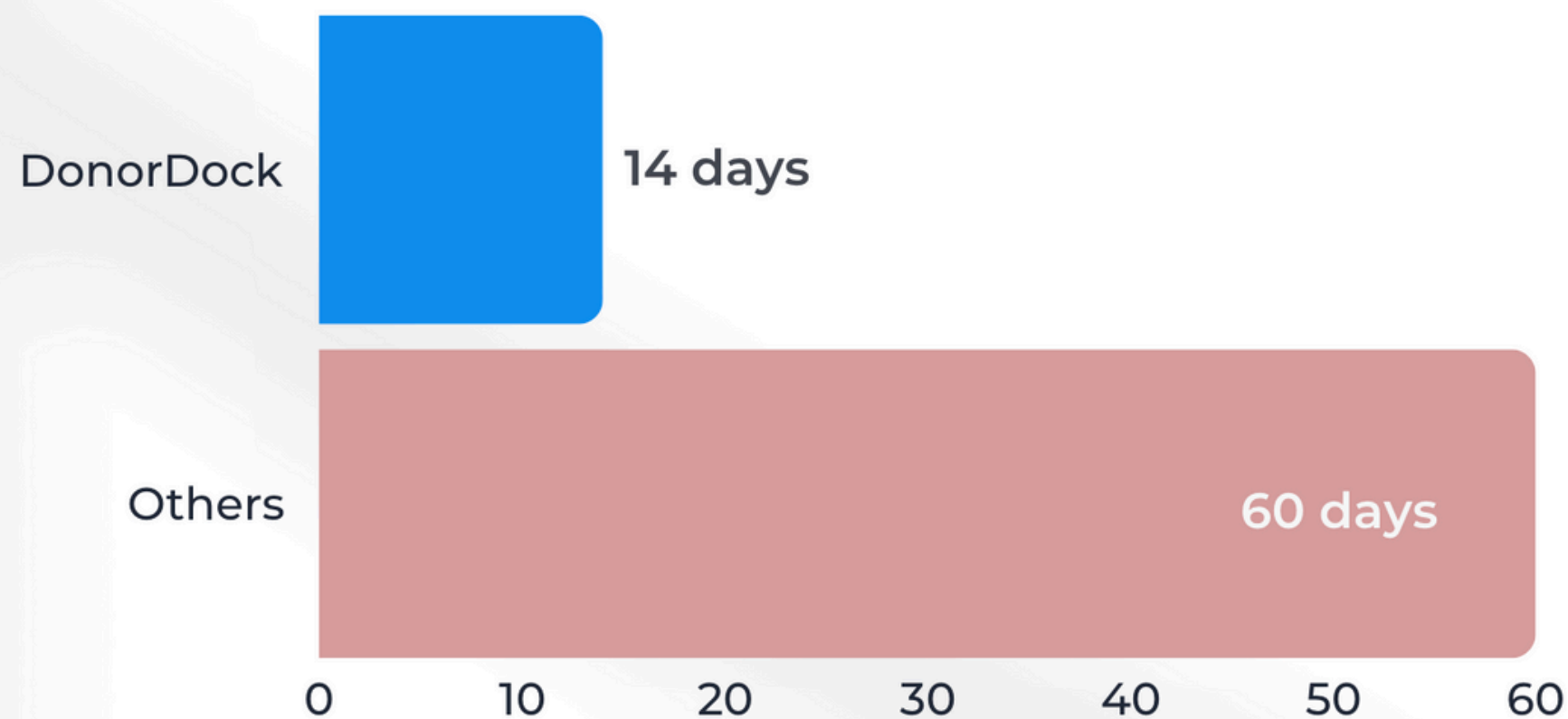
Powerful, simple-to-use reports to organize your contacts, gifts, and activities.



More than 100 additional features with new features added consistently.

Easy to Onboard

 Our team is involved at every step to make it seamless.



Migrate Quickly

Be up and running in less than 14 days on average.



Free Training & Support

Make it simple for your whole team to adopt.



Long-Term Impact

Build stronger donor relationships and improve fundraising over time.

Quick Search

Advanced Search

- Home
- Add New
- Receipts
- Mailings
- Reports
- Tasks
- Utilities
- Apps
- Resources

Welcome to DonorPerfect, Adriane!

SHOW ME HOW TO

ADD A
New Donor

Start Walkthrough

ADD A
Gift

Start Walkthrough

Great fundraising is retaining your donors

Plenty of room to grow!
You're **↓ 28.6% lower** than the industry average.

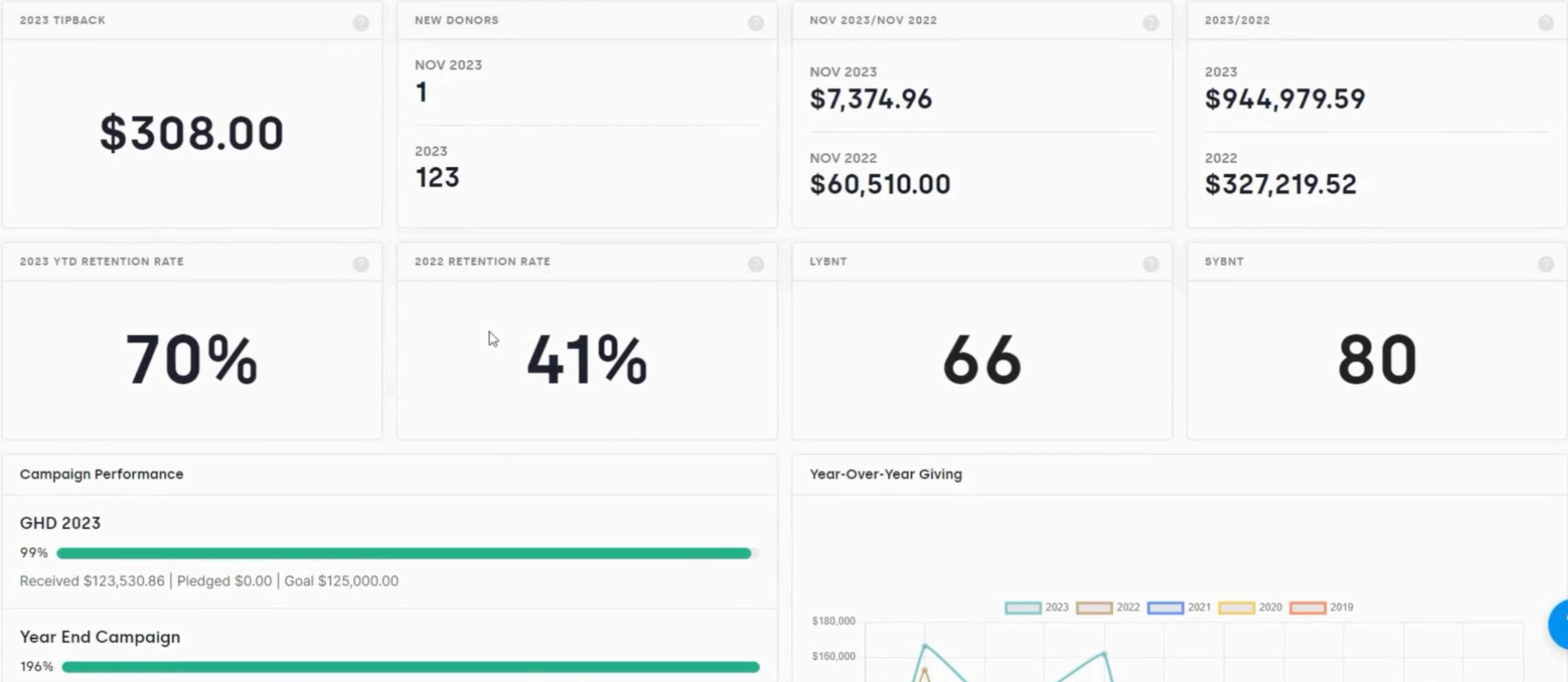


Learn more about your **retention rate**
by visiting your dashboard.

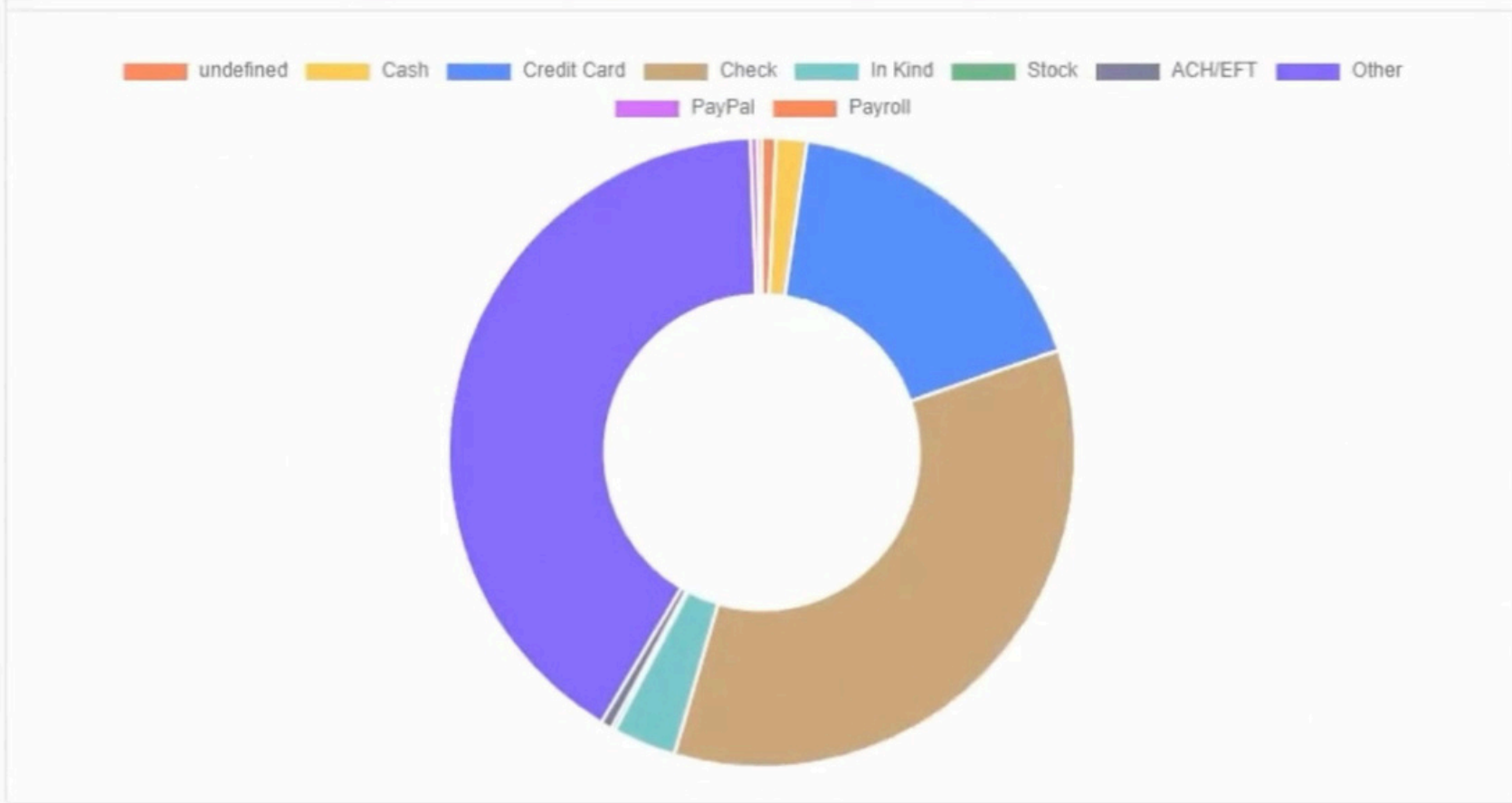
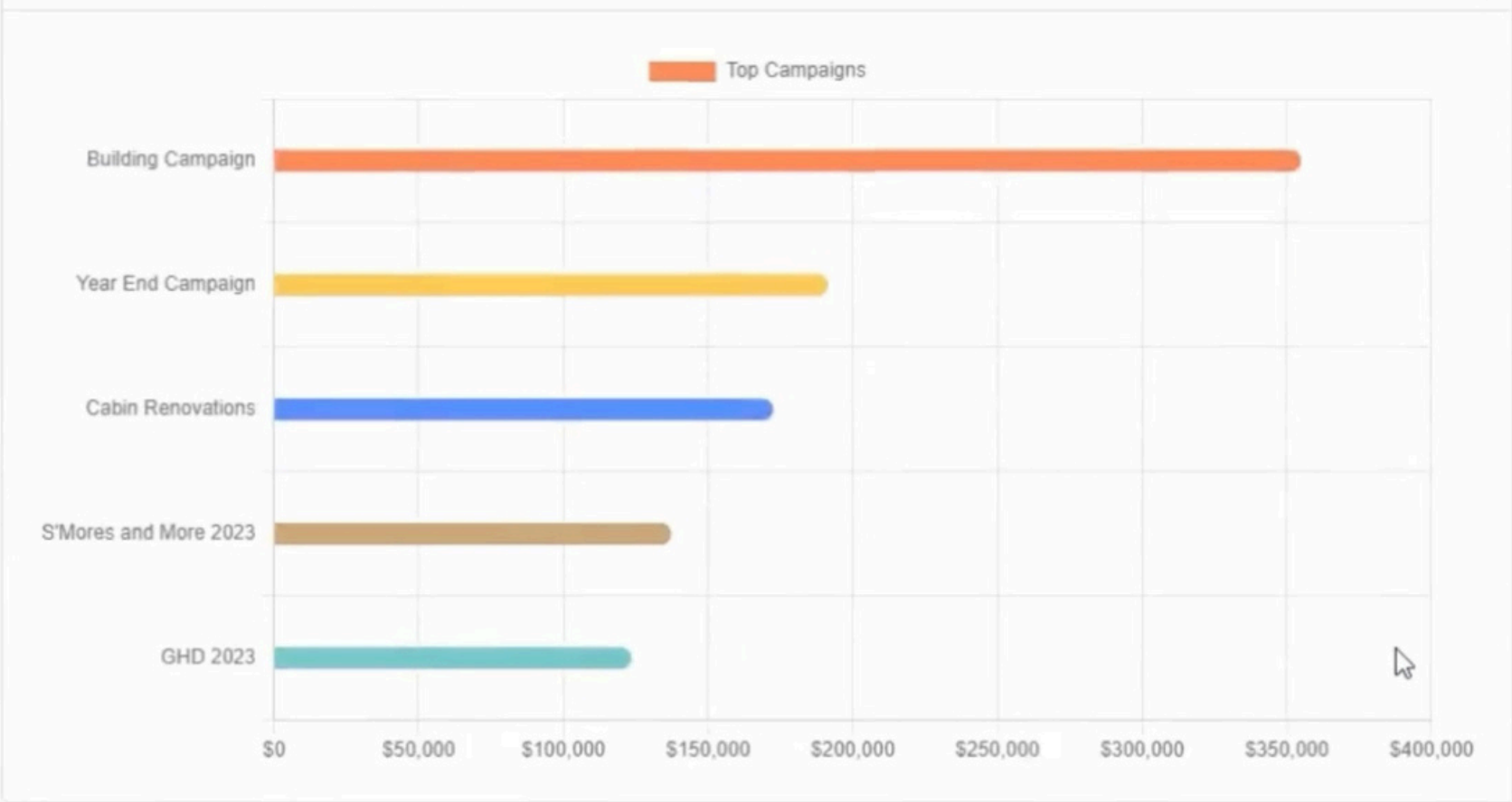
VIEW MY
Dashboard

Start Walkthrough

Dashboard



Dashboard



Top Donors

| | |
|--------------------------|--------------|
| Han Anderson | \$364,915.00 |
| Tashana Wilson | \$199,600.00 |
| Carolynn Allen | \$145,542.98 |
| Helping Hands Foundation | \$122,500.00 |
| Portia Johnson | \$102,500.00 |

New Donors

| | |
|---------------|------------------------|
| Heather Olson | \$300.00 - Nov 3, 2023 |
|---------------|------------------------|



Reports

🔍 Type to search reports...

+ Create

👤 Contact Reports

Standard Reports

Active Donors

Active Prospects

All Contacts

All Donors This Month

All Donors This Year

Donor By Owner

Lapsed Donors

New Donors This Month

New Donors This Year

Second Time Donors This Month

Second Time Donors This Year

Your Custom Reports

📄 Gift Reports

Standard Reports

Gifts This Month

Gifts This Quarter

Gifts This Year

Pledges Due This Month

Pledges Due This Quarter

Pledges Due This Year

Pledge Balances

Giving Summary

LYBNT

SYBNT

Giving by Geography

Contribution Statements

✅ Activity Reports

Standard Reports

Activities By User This Month

Completed Activities This Month

Emails This Month

Incomplete Activities This Month

Text Messages This Month

Unsubscribe Report

Your Custom Reports

Activities

Bridgette's Monthly Activities

Event Attendance

Fundraising Activity Report

Grant Submissions





PROJECT MANAGEMENT



SCOPE- MANAGEMENT

◆ Project Scope

- Evaluate DonorPerfect
- Research new CRM options
- Recommend the top 2–3 platforms
- Focus: donor engagement + reporting

◆ Functional Scope

- Identify underused DonorPerfect features
- Compared communication & reporting tools
- Recommend platforms with better integration options

◆ Nonfunctional Scope

- Prioritize user-friendly, scalable platforms
- No training, implementation, or data transfer

◆ Data Scope

- Recommend better reporting features
- Ensure SCVC compatibility

RISK MANAGEMENT

While working with SCVC, our team identified several project-specific risks that could impact the quality and timeliness of our recommendation. These risks relate to software compatibility, communication, and time limitations. Here's how we addressed each one to stay on track.



Recommending a platform that doesn't integrate well

Mitigation: Focus only on CRMs that are compatible with Salesforce Hands-On and scheduled demos.



Limited Access to Stakeholder Feedback

Mitigation: Stay in regular contact through emails and check-ins; ask specific questions.



Time Constraints

Mitigation: Closely followed our Gantt chart and weekly milestones to stay on track and meet deadlines.

COMMUNICATION MANAGEMENT

Purpose: Ensure communication between SCVC sponsor and project team

- Frequency:
- Bi-weekly check-ins with Leslie
 - Weekly team check-ins

- Tools Used:
- Email
 - Zoom
 - Google Doc/Slides
 - Group Chat

- Stakeholders:
- Project Sponsor - Leslie from SCVC
 - Project Team - SJSU
 - Advisor - Professor

CHANGE MANAGEMENT

Final Deliverables were
Completed and confirmed
with SCVC

We focused on Delivering a
Clear recommendation for
implementation

A training manual was
Discussed



THANK YOU!

