



Nonprofit Saves Valuable Staff Time, Decreases Database Costs, and Increases Data Security with Click & Pledge

In 2002, Birthday Wishes started as a family volunteer project with one goal in mind: to bring joy to the lives of homeless children through birthday celebrations. At the time, they worked with one shelter in Newton, Massachusetts; today they work with over 200 shelters and agencies throughout Rhode Island, Massachusetts, and Long Island to provide individual and group birthday celebrations for children experiencing homelessness. Through their vast network of volunteers, shelters, and agencies, Birthday Wishes provided birthday celebrations for more than 32,000 kids in 2015.

“Through our on-site program, we provide a birthday party once per month for all the kids who have a birthday in that month,” explains Lisa Vasiloff, Co-Founder and Executive Director of Birthday Wishes. “For more protected agencies, we provide a ‘Birthday-in-a-Box,’ which includes cake mix, decorations, presents, and goodie bags.” Each party ends with kids or volunteers handing out goodie bags to all the kids who attended, making it a celebration for more than just the birthday girls and boys.

Of course, planning such a large number of events takes quite a bit of work. To ensure these parties can continue each month, Birthday Wishes relies on the work of 11 employees, 125 trained (volunteer) Party Coordinators, and thousands of volunteers who donate presents, wrap gift boxes, and even “donate their birthdays” to the cause. And in addition to the party-related tasks, there’s quite a bit of work to do behind the scenes as well.

“Despite the simplicity of our concept, there are a lot of moving parts to make it all happen,” explains Vasiloff. “We have an enormous amount of data to collect, track, and manage. And then we need to be able to analyze it in numerous ways.” In addition to managing the data related to the more than 32,000 children they serve, the Birthday Wishes staff needs to track and acknowledge cash and in-kind donations. With so much data to manage, an efficient and effective CRM is a must.

Duplicate Records: An Expensive Problem

The sheer enormity of the data Birthday Wishes needed to collect, track, and manage became something of a problem with their previous database and payment processing solutions. While using an online database to manage donor records and a separate payment system to process credit cards, they encountered a major problem: duplicate records. Because these systems didn’t work well together, slight changes in donor information—a nickname, an abbreviation, a different email address—resulted in more than one record per donor or volunteer.

For many nonprofits, the tracking and elimination of duplicate records is a large hassle for their staff—the merging and purging of donor data creates extra work, taking staff away from more productive tasks. But for the Birthday Wishes staff, the duplicate records were more than just a nuisance; because their online database was a subscription-based system that charged per record, each additional record the system created for them resulted in an extra cost.

“Every year our bill kept getting bigger and bigger,” recalls Kasey Fitzgerald, Database and Communications Coordinator. “It just wasn’t working for us anymore.”

Click & Pledge Integrated with Salesforce Eliminates Hassle

With the difficulties caused by duplicate record creation and so many different types of data in play, finding a CRM and payment processing platform that worked together became a top priority for the Birthday Wishes staff. They were also planning to launch a new website and hoped to have the new systems in place for the launch. After doing some research, Vasiloff and Fitzgerald determined that Salesforce would satisfy their database management needs. They sought out the help of 501Partners, a consulting firm that helps nonprofits with Salesforce integrations, to get Salesforce up and running. With the duplication problem in mind, they asked Paul Baxter, their Salesforce Consultant, to point them to a payment processing solution that would integrate with Salesforce. Without hesitation, Baxter suggested Click & Pledge.

“They needed to have something that was going to be rock-solid reliable,” recalls Baxter. “With the size of their staff and the number of transactions they do, they wouldn’t want to be in the position of double-checking everything.” Baxter recognized that in order for Birthday Wishes to continue to grow, they needed a really efficient and lean development operation. With six different offices collecting donations and forwarding data to the main office, consistency and reliability was key. Click & Pledge provided that consistency and reliability.

“Click & Pledge has increased their fundraising efficiency, proving to be a reliable tool that integrates well both on the website side and on the Salesforce side,” explains Baxter. “This allows Birthday Wishes to collect and track donations with a minimum of staff time.”

Looking Forward to Growth with Click & Pledge

With Click & Pledge and Salesforce in place, Vasiloff and Fitzgerald feel hopeful about the future. The customizability of Click & Pledge has allowed them to integrate donation forms seamlessly into their new website, making the donor experience consistent and enjoyable. The custom fields available through Click & Pledge’s donation form allow Birthday Wishes’ supporters to make donations in honor of a loved one’s (or their own) birthday, and Vasiloff and her staff are able to properly track and acknowledge those donations.

In addition, both Vasiloff and Fitzgerald emphasize that users cannot underestimate the value of the impressive security level of Click & Pledge. “Our previous system didn’t feel very secure,” explains Vasiloff. “But with Click & Pledge, our donors don’t wonder if their credit card information is safe. It’s just a really solid site.”

The ease and security of use provided by Click & Pledge allows Vasiloff and her staff to focus on more important tasks like celebrating kids' birthdays, thanking donors, and managing volunteers. According to Baxter, this makes Click & Pledge an integral part of their future growth.

“Managing donations with Click & Pledge is a big part of Birthday Wishes’ growth plan because it will free up their development staff to focus more on raising money and not just managing it,” explains Baxter.

Vasiloff agrees. “It can grow with us,” she says. “With Click & Pledge, the sky really is the limit.