

Case Study: Hearts & Homes Community Foundation

Transforming Operations Through Strategic Database Solutions

Hearts & Homes Community Foundation, a Milwaukee-based nonprofit serving homeless families and at-risk youth, faced a pivotal moment in 2023. After 15 years of service, they struggled with fragmented donor data, declining corporate support, and staff burnout from outdated fundraising methods.



Outdated Donor System

Siloed data and missed connections limited fundraising effectiveness.



Declining Corporate Support

23% drop in corporate donations over two years.



Staff Burnout

High turnover from cold-calling and inefficient processes.



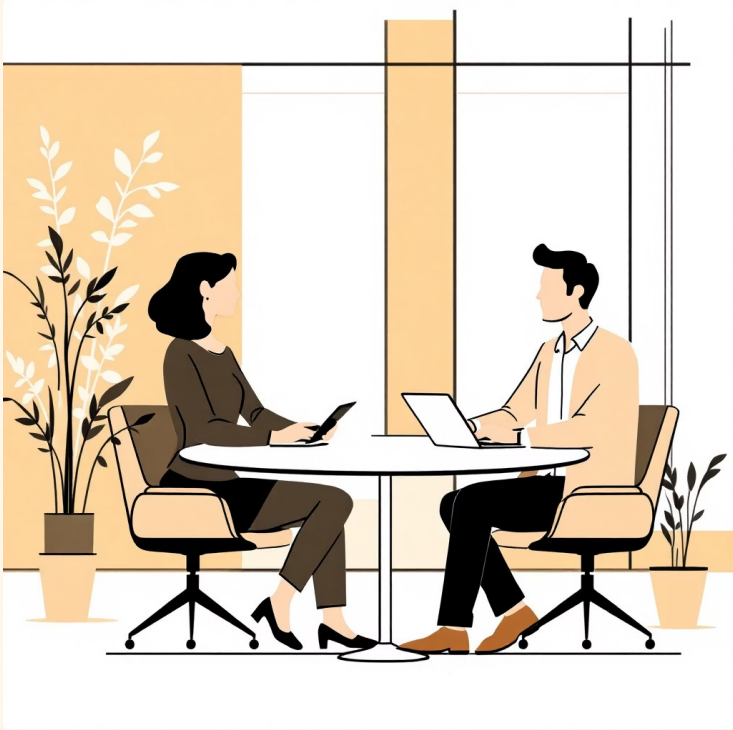
Volunteer Engagement

Limited volunteer involvement despite strong community interest.

The Partnership with Society's Bedrock

Executive Director Maria Santos sought help from Society's Bedrock after learning about their vendor matching services. "We knew we needed help, but didn't know where to start," Santos recalls. "We were drowning in spreadsheets and losing donors we couldn't properly track."

Society's Bedrock conducted a comprehensive needs assessment and matched Hearts & Homes with CommunityConnect Pro, a database solution tailored for mid-size nonprofits.



Implementation and Results

1

Enhanced Donor Intelligence

- 347 lapsed donors identified
- 89 major gift prospects found
- 156 new corporate connections mapped

2

Volunteer-Donor Connection

- 68% of engaged volunteers had never been asked to donate
- 43% increase in volunteer retention
- \$127,000 in new donations from volunteers

3

Scaling Programming

- 35% program expansion despite corporate decline
- 78% increase in individual donor revenue
- Donor churn reduced from 31% to 18%



Staff Transformation & Efficiency Gains

End of Cold-Calling

89% reduction in cold outreach, 156% increase in qualified meetings, and staff satisfaction up from 3.2 to 4.7/5.

Foundation Success

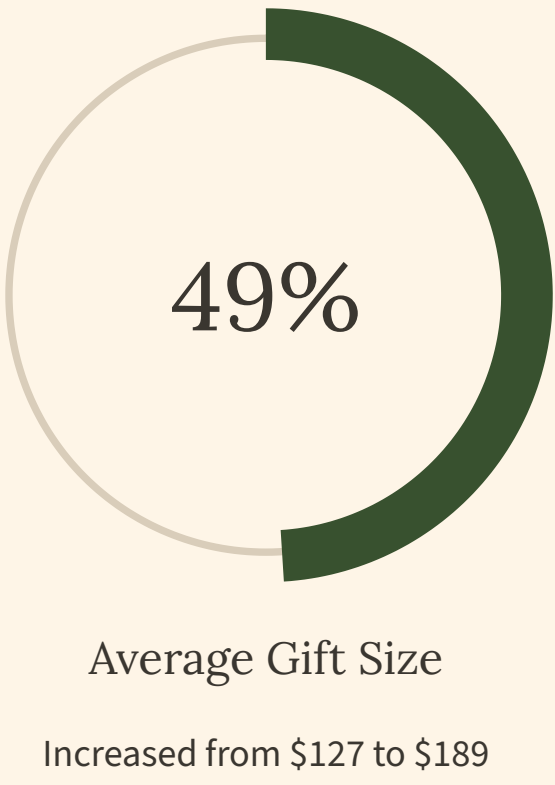
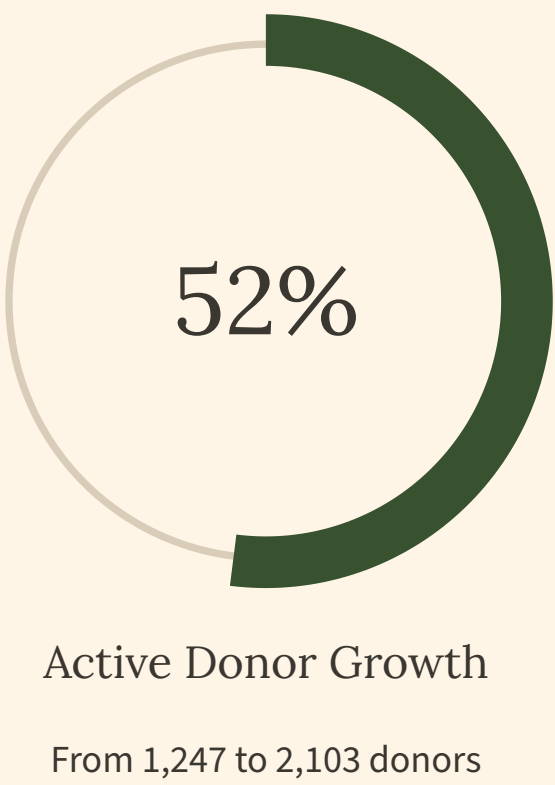
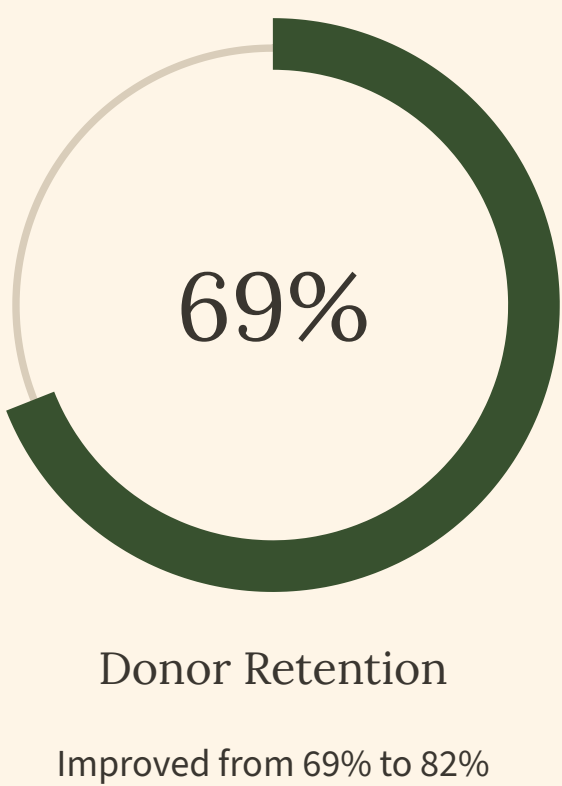
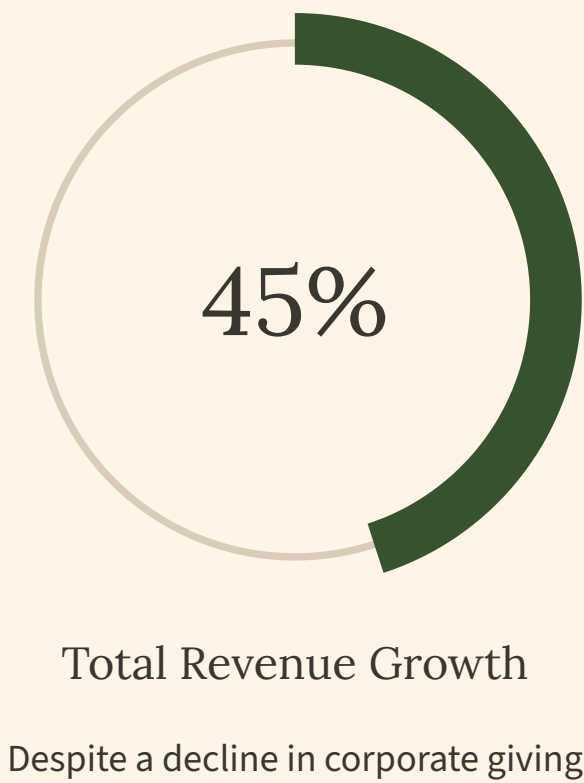
Grant success rate improved from 23% to 41%, average grant size up 34%, and compliance time reduced by 60%.

Seamless Tech Integration

Email, accounting, website, and social media tools now work together, boosting segmentation accuracy by 340% and eliminating dual data entry.

Measurable Impact After 6 Months

Financial Results



Operational Improvements

- Staff productivity in development up 67%
- Volunteer coordination time reduced by 45%
- Board engagement in fundraising up 78%
- Grant application success rate doubled

Looking Forward

- Launch planned giving program in 2025
- Expand services to 40% more families
- Develop corporate partnerships based on employee giving
- Create peer-to-peer fundraising campaign

Key Takeaways for Other Nonprofits

Data Integration Reveals Hidden Opportunities

Connecting volunteer and donor data unlocked new revenue streams.

AI-Powered Tools Enhance Human Relationships

Technology freed staff to focus on meaningful engagement.

Strategic Vendor Matching Matters

Society's Bedrock ensured the right solution fit, not just the most popular.

Staff Satisfaction Drives Donor Success

Happier employees led to better donor experiences and retention.

Continuing the Journey: Hearts & Homes + Society's Bedrock

Hearts & Homes Community Foundation continues to work with Society's Bedrock for ongoing optimization and strategic planning. Their story demonstrates how the right technology partnership can transform nonprofit operations and amplify community impact.

Ready to transform your nonprofit? Get started on your own journey—contact Anton at anton.timms@societysbedrock.com



Amplify Impact

Leverage data-driven strategies to expand your reach and serve more families.



Empower Your Team

Boost staff satisfaction and efficiency with integrated technology solutions.



Build Lasting Relationships

Transform donor and volunteer engagement for sustainable growth.

