Bonterra™

Covenant House International transforms fundraising and reporting with Bonterra and Barker & Scott

About

Covenant House International is a federation of shelters serving youth experiencing homelessness. Across 34 cities and five countries, more than 2,200 young people sleep in a Covenant House bed each night. Covenant House is committed to providing unconditional love, absolute respect, and relentless support for each young person who walks through their doors. They envision and work toward a world where every young person has a safe place to sleep and the love, respect, and support they deserve, and need, to thrive.

Barker & Scott, an independent technology consulting firm, works exclusively with nonprofit organizations like Covenant House International, helping them get full value out of information technology, bridging strategy, people, processes, and data for operational excellence, resource development, and mission success.

The challenge

COVENANT HOUSE INTERNATIONAL (CHI) HAD BEEN EXPERIENCING TECHNOLOGY SILOES FOR MANY YEARS

Before making their move to Bonterra Fundraising & Engagement, CHI used many different tools for many different purposes: donations, events, peer-to-peer, and direct mail and email marketing programs all had their own platforms. These platforms were not well integrated or connected, so data couldn't be easily shared among them, and staff were slowed down by the lack of connective infrastructure. Some teams were even working with little to no technology: the major gifts and planned giving staff used no database at all — just paper. In this context, information sharing was difficult, making understanding and deepening constituent relationships and increasing support challenging.

The organizational structure grew around the isolated systems, with separate teams for direct mail, which was the primary focus, and digital marketing. Staff transitions over the years led to the loss of institutional knowledge. As VP for Development Operations Melissa Lee-Zambo put it, there was "a growing sense among almost all of our staff and our leadership that the tools we were working with were hampering our ability to grow," but the nature and scale of a project like moving databases meant it was difficult to know where to begin.

THEN CAME THE FINAL STRAW: THE SUNSETTING OF THEIR DONATION DATABASE

Two weeks before Christmas 2017, in the thick of year-end giving season, CHI's legacy donation database notified the team that the platform was being sunsetted — and they would have eighteen months to find a new platform to meet their needs. After some negotiation, CHI settled on a deadline of spring 2020 to find a new home.

Bonterra

The solution

Recognizing this news as an opportunity to go deep and reevaluate the ways their technology could do more to support their strategic, fundraising, and operational goals, better engage supporters, and understand the organizational changes that would be needed for success alongside improved technology, CHI engaged Barker & Scott to guide them through a needs assessment, an objective, unbiased software selection process, and to build an implementation roadmap that would position each individual and the team for success with the new software and constituent relationship management (CRM) strategy. Barker & Scott worked with CHI to conduct a seven-month deep dive into their strategy, data, and processes to understand who they were as an institution, achieve clarity on what they wanted to accomplish, and find the tools that could support them in the future.

To ensure success through the evaluation and selection process, Barker & Scott created a proprietary matrix designed to help them find the appropriate balance of oppositional qualities they were seeking in a technology partner. Ultimately, when considering the right blend of power and usability, and thinking about which platforms could best serve the strategic future of their programs, Bonterra Fundraising and Engagement rose to the top as the best choice for CHI.

Alan Levine, principal at Barker & Scott says, "Bonterra supported all levels of giving from small memberships and recurring gifts to high-touch fundraising, transformational gifts, and planned gifts. The Fundraising and Engagement solution did it all in a unified way that was manageable with the resources CHI had that would allow them to engage their various sites. The fact that Bonterra allowed them to use a single tool and a single constituent record to effectively engage supporters across both digital and more traditional channels was a huge factor in CHI's decision."

Bonterra

3

While CHI had an understandably long and complex list of needs as a large federation, CHI found that "every single aspect" of their work had "at least 75% of their needs met out of the box" with Fundraising and Engagment. Barker & Scott agreed: "It's rarely any one single feature that really makes the difference. What matters is that overall experience and alignment with their unique mission and strategy, and their constituent engagement approach and priorities — so being able to quantify that 75% or 80% match and to honestly recognize the gaps and know they are less critical for their needs — that really helps an organization find the system with the right balance of tradeoffs and to choose the right solution for them. And that's what happened with Covenant House and Bonterra."

Other key components of CHI's decision to move into Bonterra Fundraising and Engagement included the solutions' **usability**, **customizability**, and **reporting** capabilities.

USABILITY

After years using siloed legacy toolsets, the hardworking CHI staff were accustomed to databases that required extensive technical knowledge in order to understand how to read the information stored in it. Through the selection process, it became clear to CHI staff that usability was important to them, and the intuitive user interface of the Bonterra solutions was something CHI staff consistently praised. It would empower each person and team to do more, make better decisions, and to be better at their jobs.

> " The number one piece of feedback I hear is: 'I can read this. My eye knows where to go, I know how to understand what I'm looking at.'"
>
> — Melissa Lee-Zambo, VP of development operations, CHI

EASY INTEGRATION

Although it was helpful that the technology could meet so many of CHI's needs pre-customization, CHI's database managers and technical staff were "really impressed at the nature of Bonterra Fundraising and Engagement's API tools." Because the solution's open API offers organizations the ability to integrate the platform with so many other tools, CHI staff were able to create a technology ecosystem that met their unique needs by treating Bonterra as their hub and connecting other tools to the platform. This allowed them to tailor their technology to their needs, like accessing data across programs and easily reporting on results.

REPORTING

The reporting dashboards in Bonterra Fundraising and Engagement were a strong draw for CHI's executive teams. These teams needed a tool that could showcase ongoing trends at a minute's or a day's notice — something that wasn't possible in their legacy systems — and they found what they were looking for in Bonterra's solution. This turned out to be important, as Covenant House soon had to navigate rapid changes brought about by the COVID-19 pandemic.
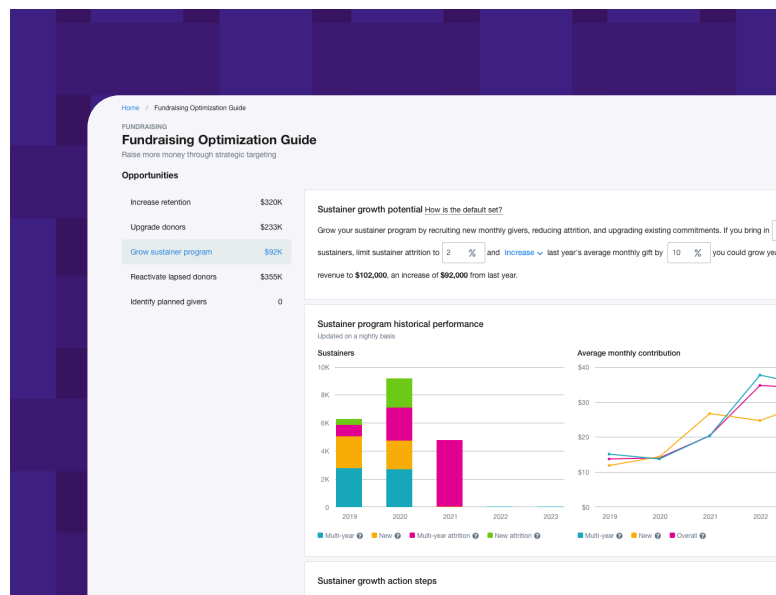
VALUES

As a nonprofit committed to serving vulnerable populations, it made a difference for Covenant House to know that their software of choice was built and staffed by former nonprofit professionals. As Barker & Scott explained: "Covenant House and Bonterra have a partnership, and it's a long-term relationship, so the fit of the teams, Bonterra's other customers and product roadmap, and the values that the organizations share is very important and was certainly a factor considered by the Covenant House team."

> " I love that the team at Bonterra is made up of people who have worked at nonprofits, because what your team offers us in almost every conversation is, 'What can we take off your plate? How can I help you to be more expert at what you need in order to execute on the task at hand?' In every call with our customer success team, we walk away with actual value that we can execute and use to improve our processes."
>
> — Melissa Lee-Zambo, VP of development operations, CHI

The outcomes

GivingTuesday SUCCESS WITH BONTERRA

Once CHI made their decision, the conversion to their new platform didn't happen overnight — the experienced team at Bonterra helped them triage their programs as they moved in. CHI's email marketing team went first, and thanks to preparatory work on CHI's email deliverability, plus their investment in email marketing, search engine marketing, and social media advertising, **CHI's first GivingTuesday in Fundraising and Engagement became the best one in their organization's history.**

83% INCREASE

in GivingTuesday fundraising from 2019.

> " Bonterra's team evaluated what we were trying to achieve and helped us prioritize our data for our best path to adoption. With that guidance, we could see instant fundraising success from each piece that we moved."
>
> — Melissa Lee-Zambo, VP of development operations, CHI

OPTIMIZED REPORTING WORKFLOWS

Before their move, CHI's planned giving reporting workflow took place largely on paper and relied on accessing the institutional knowledge of one very busy staff member. Given these limitations, the reporting process required weeks of staff time to complete. Since making the switch, CHI's **planned giving reporting looks drastically different**. Not only have staff been able to decrease the overall time they spend on creating reports, but **reporting now takes place more organically**, taking 10–30 minutes of preparatory work and a mere 45 seconds to click and pull the report in Fundraising and Engagement. This was made possible by the staff's ability to share knowledge and make information available in the CRM, and as a result, CHI's experienced and valued staff are now free to spend their time on tasks that really require a human touch, like liaising with attorneys, executors, and banks to keep information moving smoothly.

> " The advice that I would have for organizations considering making the switch to Fundraising and Engagement is: do the work to know what your needs are; be open, honest, and transparent about your needs; and then trust that the Bonterra team is going to guide you in putting those pieces in place to drive your success."
>
> — Melissa Lee-Zambo, VP of development operations, CHI

FUNDS REACH COVENANT HOUSE SITES 2X FASTER

As a federation, CHI is primarily the operational and fundraising arm of Covenant House, working with over 30 facilities. One of CHI's key responsibilities is to fundraise the gap between what a site can raise on their own and the total amount they need in order to serve their residents. CHI's mechanism for that is sending a constant flow of dollars to sites every 15 days.

In CHI's legacy systems, it took 30 to 60 days for funds to be received, reconciled, and delivered to sites. With support from custom fields for contributions in Bonterra Development, this process now takes only 15 to 30 days — meaning with Fundraising and Engagement, CHI has been able to send critical funds to their sites **two-to-four times faster** than before. The faster the reconciling, the faster funds are in the hands of Covenant House sites, and the faster they can spend it on mission-related work — which became especially important during the onset of the COVID-19 pandemic.

![Bonterra]

> " In the pandemic crisis, faster reconciliation processes in Bonterra Fundraising and Engagement meant we were able to deliver rapid influxes of cash to our sites as food, medical, and personal protective equipment costs shot up. We were in as much of a budget crunch as other organizations in terms of fundraising, but as funds came in, we were able to deliver them immediately to people who needed it, so that we were constantly able to keep our doors open and meet the needs of our population."
>
> — Melissa Lee-Zambo, VP of development operations, CHI

EVOLVED EXISTING EFFORTS INTO A DATA-DRIVEN TRANSFORMATIONAL GIVING PROGRAM

One of CHI's goals during their technology selection process was to evolve some of their existing fundraising efforts. They took their mid-level to major donor program and remolded it into a truly comprehensive transformational giving program, successfully raising much-needed funds through large gifts solicited collaboratively between CHI and their sites. As Barker & Scott described it, CHI "had built their organization, data, and processes around the way they had traditionally interacted with their constituents, which was primarily through direct mail and direct response channels. However, they recognized that there was a need and an opportunity to rethink and expand into a much more omnichannel approach that considered the entire lifetime relationship and could identify and move individual prospects to higher levels of engagement and giving." This approach helped them to better address each supporter's unique journey and give them a smooth experience as they moved through the gift-making process.

Through their collaboration with Barker & Scott, CHI began pursuing long-term donor relationships with a more digital approach. Barker & Scott helped CHI:

Capture a baseline and understand where they were starting

Unify different perspectives toward what all staff had in common: fueling the organization's purpose to support youth experiencing homelessness and engaging constituents to support that mission

Set new (and more ambitious) goals

Refocus time toward strategic interactions that moved donor relationships forward

Establish goals not just for revenue, but also for donor prospecting and cultivation activities and results at every stage of the relationship-building and cultivation cycle

Make data-driven decisions about how giving officers spent time to ensure each day was productive in reaching the right constituents at the right time with the right messages, so CHI kept donors moving steadily through the pipeline

Develop and reinforce new processes and metrics to measure the new approaches, activities, and results tailored to CHI's culture and purpose while also being informed by best practices

Bonterra

CAPITAL CAMPAIGNS TO FUND A NEW SHELTER

The right technology can support organizations like CHI as they work with valued partners to complete major projects. CHI and their partner Integral used lookalike modeling strategies using data from within CHI's own Fundraising and Engagement instance, plus Bonterra's WealthEngine integration, to shape their donor prospecting, identify a core audience, and develop micro capital campaigns targeting them.

As a result of this work, CHI has run three micro capital campaigns over the past few years. One of their biggest successes has been with their affiliate Covenant House Guatemala, where a successful capital campaign made it possible for the organization to **open a brand new shelter in Guatemala serving an expanded audience**. As Melissa Lee-Zambo described it: "We finished our conversion in June of 2020, and **we've already seen mission results thanks in part to the fundraising campaigns we've been able to execute with Bonterra**."

The results of these technology, data, process and change investments became especially clear in July of 2023, when a construction crane collapsed and damaged the nearby shelter operated by Covenant House NY. Without any warning, Covenant House had to quickly find alternate shelter, food, and other necessary accommodations for the residents, without knowing how long they might be out of their building. The strong support CHI had built with donors thanks to the new capabilities that Fundraising and Engagement had delivered, and their ability to rapidly reach out to supporters, helped them quickly fund and mobilize the resources needed, and keep everyone comfortable and safe until they could return.

Want to see it for yourself?

The right technology partner can help your organization save time, evolve your fundraising, and run stronger programs that engage more supporters with a better experience for an even deeper impact.

Request a demo