

A Case Study:  
San Francisco Baykeeper's  
transition to and use of CiviCRM



# The Bay's pollution watchdog

- Small environmental organization
  - Founded 1989
  - Seven staff
  - \$825,000 annual budget



# Before CiviCRM

- Blackbaud Raiser's Edge offline donor database
  - \$2,500 annually
- Email Now from Network for Good
  - \$30 a month.
- Custom database to collect online donations and event ticket purchases.
  - \$1,000 per customization

# Challenges

- Lots of data entry among systems
- No integration between email and donor data
  - Cultivation of online donors only through the mail, which is costly a lot and is not very effective
- Expensive to customize

# 2007 Online Membership Expansion

November 2007 Cosco Busan oil spill in the Bay

- 4,000+ new email sign-ups

- 400+ new online donors

- And since 2007, developed more needs:
  - Hosting personal fundraising pages for recreational fundraising events
    - About \$1,000 in fees per event
  - A new website design and improved functionality

# 2010 Decision to Convert

- Received a major one-time award
- New staff person with Drupal web skills

# CRM Research

- Salesforce
- Democracy in Action
- Raiser's Edge online modules
- CiviCRM



# CiviCRM vs. Raiser's Edge Online

- Both offered:
  - Online customizable contribution pages
  - Online customizable event/ticket pages
  - Online personal fundraising pages
  - Integrated email management

# CiviCRM vs. Raiser's Edge Online

- Raiser's Edge online modules
  - Very powerful search and report functionality
  - Widely varying levels of integration with offline database: PCPs particularly weak
- CiviCRM
  - Drupal integration
  - Open-source/freedom from Blackbaud
  - Reduced functionality, particularly in searching and reporting

# Cost comparison

- Upfront conversion cost estimated the same:  
\$8,000
  - Developer costs for Civi conversion
  - Setup fees for Raiser's Edge

# Cost comparison

- Ongoing costs very different
  - \$4,000 a year for Civi developer support and hosting
  - \$7,000 for Raiser's Edge yearly subscription costs

# Cost comparison

- Transaction fees
  - Paypal Pro \$1,600 a year
  - Raiser's Edge \$3,600 a year

# Conversion to Civi

- Decided to convert from Raiser's Edge to CiviCRM
  - Interviewed several consultants
  - Hired Dharmatech

# Conversion to Civi

- More complicated than we estimated
  - About 40 CSV files and 42,000 columns of data for 23,000 records
  - Baykeeper spent \$10,000 and Dharmatech contributed an additional \$3,500 in in-kind hours

# Post-conversion challenges

- Learning different methods of searching and reporting.
- Needed external developer to set up basic donor management reports (like combining mailing data and contribution data).



# Post-conversion challenges

- Setting up new gift processing procedures in special situations for which Raiser's Edge has built-in functionality (such as "third-party payments").
- Developing online systems & workflows that previously were automated by outside services, such as managing email subscription lists.

# Post-conversion advantages

- Online customizable contribution pages
- Online customizable event/ticket pages
- Online personal fundraising pages
- Integrated email management allows us to:
  - monitor donor email & online activity
  - conduct targeted fundraising and outreach to our email subscribers

# Post-conversion advantages

- Checksum email links that pre-populate forms
- With CiviCRM/Webform Integration module, use of webforms for “Take Action” activities



## San Bruno Agrees to Reduce Sewage Spills to the Bay

[LEARN MORE](#)

Since 1989, Baykeeper has been the pollution watchdog for San Francisco Bay, using science and advocacy to strengthen clean water laws and hold polluters accountable.

Help us continue our efforts by making a contribution today.

[MAKE A DONATION](#)

### Trash

SEP 20, 2011 BY TRACY CORBIN

## Baykeeper Volunteers Pitch In for Coastal Cleanup Day

This past Saturday, more than 20 Baykeeper volunteers participated in California's annual Coastal Cleanup Day at India Basin Shoreline Park. Volunteers cleaned up more than 500 pounds of trash from...

DEB SELF  
SEP 14, 2011



## Ask the Governor to Sign Key Legislation

Please contact Governor Brown today and ask him to sign three important pieces of legislation that will have major impacts on California's environment and public health. AB 1112 (Jared Huffman-D, San Rafael) would provide funding for oil spill...

### Oil Spills

SEP 19, 2011 BY DEB SELF

## Cosco Busan Settlement Falls Short

Yesterday, federal, state and local government agencies announced their financial settlement with those responsible for the Cosco Busan oil spill which dumped 53,000 gallons of oil into San Francisco...

### TAKE ACTION AND KEEP IN TOUCH

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Follow Baykeeper on Twitter



Get Baykeeper's RSS feed

### FEATURED CAMPAIGNS AND AREAS OF FOCUS



Sick of Sewage



Storm Water Management



Climate Change Adaptation



Containing Vessel Pollution



Regulating Toxic Pollutants



Wetland Protection

### SAN FRANCISCO BAY NEWS

San Francisco  
Chronicle

SEP 20, 2011

Report on S.F. Bay details progress, problems

- Donate
- Donate Now
- Ways to Give
- Become a Recurring Donor
- Tribute and Memorial Gifts
- Workplace Giving
- Donate Your Car or Boat
- Donate Stock
- Planned Giving

Home

## Help Baykeeper Protect the Bay With Your Contribution

Baykeeper is your strongest advocate for a healthy and vibrant San Francisco Bay, and with your support, we're tackling the most crucial pollution threats, from oil spills to sewage spills to runoff from industrial sites and city streets. Your gift will help us secure the best possible protections for the Bay, its wildlife, recreational users and Bay Area communities.

Contribution Amount \*  \$ 30.00  \$ 50.00  \$ 80.00  \$ 100.00  \$ 200.00  Other Amount

Other Amount:

I want to make a one-time contribution.  
 I want to contribute this amount every  month(s) for  installments

Your recurring contribution will be processed automatically for the number of installments you specify. You can leave the number of installments blank if you want to make an open-ended commitment. In either case, you can choose to cancel at any time.

Email Address \*

### Name and Address

First Name \*

Last Name \*

Street Address

City

State

Zip Code

### Credit Card Information

If you have a PayPal account, you can click the PayPal button to continue. Otherwise, fill in the credit card and billing information on this form and click **Continue** at the bottom of the page.



Save time. Checkout securely. Pay without sharing your financial information.

Card Type

Card Number

# TransBay Relay 2011

Thank you for joining the TransBay Relay!

Each swimmer is asked to raise a minimum of \$400 to support San Francisco Baykeeper's work to protect the Bay. Your \$100 registration fee will be applied to your fundraising goal.

- Event Fee(s) \*  \$ 100.00 Relay Swimmer Registration (will be applied to \$400 fundraising pledge)  
 \$ 100.00 Solo Swimmer Registration (will be applied to \$400 fundraising pledge)

Email Address \*

## Swimmer Information

First Name \*

Last Name \*

Street Address

City

State

Postal Code

Phone \*

Team Name

Team Members \*

Please enter names of all team members.

Your estimated time for 1-mile swim \*

Waiver \*  YES. I have read and agree to the Waiver Agreement below.

READ THIS DOCUMENT (THE "WAIVER AGREEMENT") CAREFULLY BEFORE SIGNING. THIS WAIVER AGREEMENT WILL AFFECT YOUR LEGAL RIGHTS AND WILL LIMIT OR ELIMINATE YOUR ABILITY TO BRING A FUTURE LAWSUIT.

I understand and acknowledge that I am legally agreeing to the statements in the following paragraphs of this Waiver Agreement by affixing my signature below and that these statements are being accepted by Baykeeper in consideration for permitting me to participate in this swim; and I further understand and acknowledge that my statements are being relied upon by any swim sponsors, organizers, administrators, volunteers and other parties defined below as the "Released Parties."

1. I acknowledge that swimming in San Francisco Bay & the Pacific Ocean is an extreme test of a person's physical and mental limits and carries with it the potential for death, serious injury, and property damage. I acknowledge and agree that it is my responsibility to determine whether I am sufficiently fit and healthy enough to safely participate in this swim and to hereby notify Baykeeper accordingly, and I attest and certify that I am sufficiently fit and physically trained to participate in this swim and to hereby notify Baykeeper accordingly. I have no physical or medical condition which would endanger myself or others if I participate in this swim or would

Donate

[Donate Now](#)

[Ways to Give](#)

[Become a Recurring Donor](#)

[Tribute and Memorial Gifts](#)

[Workplace Giving](#)

[Donate Your Car or Boat](#)

[Donate Stock](#)

[Planned Giving](#)

Log in

[Click here to log in to your personal fundraising page.](#)

Home

## 101 Surf Sports Supports Baykeeper - Please Help Us Out!

Hi as you probably already know I am pretty passionate about all things water. In fact two partners and I are opening a brand new water sports shop in San Rafael - right on the water - called 101 Surf Sports! As part of the Battle of The Bay SUP race this October I am trying to raise some funds to help the Baykeeper Organization to keep the San Francisco Bay clean and safe. I sure would appreciate your help with any donation at all that you can spare. Thanks so much for being part of making San Francisco Bay a better place.



San Francisco Bay cleaner and stronger than we found it.

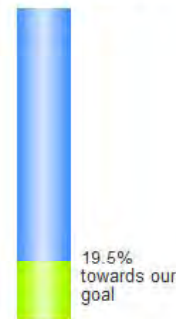
[Donate Now](#)

[Create your own Battle of the Bay fundraising page](#)

As an avid Sailor, Surfer, Windsurfer, Stand Up Paddler and soon to be Kiteboarder I really do believe we are all born of the water. San Francisco Bay is truly one of the world's most incredible bodies of water but unfortunately over the years it has had its fair share of poor treatment and that's why I am hoping you can help me help Baykeeper change all that. Baykeeper is one of the groups that is on the front lines fighting the good fight to protect, preserve, and enhance San Francisco's crown jewel - The Bay. Baykeeper works hard as a pollution watchdog for San Francisco Bay, using science and advocacy to strengthen clean water laws and hold polluters accountable. Even if you never get in the water The Bay is part of your world and has a tremendous impact on everything that surrounds it. So please do help with whatever you can to make sure we leave the San Francisco Bay cleaner and stronger than we found it.

Goal \$ 1,000.00

HONOR ROLL



\$ 195.00 raised

<b>Dean Sampere</b>	\$ 20.00
Good luck, David - hope to be there for the event!	
<b>Alamo Square Seafood Grill</b>	\$ 20.00
<b>Boston Family</b>	\$ 100.00

[Stop]

Donate

- Donate Now
- Ways to Give
- Become a Recurring Donor
- Tribute and Memorial Gifts
- Workplace Giving
- Donate Your Car or Boat
- Donate Stock
- Planned Giving

Home

## Support the SUP Battle of the Bay

On October 29, Bay Area standup paddleboarders will take on the inaugural Battle of the Bay SUP Races on San Francisco Bay benefiting Baykeeper! Support their efforts by making a gift to Baykeeper today.

### Support Individual Battle of the Bay Paddleboarders

Click on a page name below to donate in support of an individual paddleboarder.

#### Tracy's Paddling for the Bay! – Tracy Corbin

"I'm paddling for Baykeeper on October 29th in the Battle of the Bay standup paddleboard race!"

#### 101 Surf Sports Supports Baykeeper - Please Help Us Out! – David Wells

"Hi as you probably already know I am pretty passionate about all things water. In fact two partners and I are opening a brand new water sports shop in San Rafael - right on the water - called 101 Surf Sports! As part of the Battle of The Bay SUP race this October I am trying to raise some funds to help the Baykeeper Organization to keep the San Francisco Bay clean and safe. I sure would appreciate your help with any donation at all that you can spare. Thanks so much for being part of making San Francisco Bay a better place."

### Support All Battle of the Bay Participants

Use the form below to make a gift in support of all Battle of the Bay participants.

Contribution Amount \*  \$ 20.00  \$ 35.00  \$ 50.00  \$ 75.00  \$ 100.00  Other Amount

Other Amount\$

Email Address \*



# Ongoing challenges

- Loss of custom data when editing addressee & greetings and vice versa
- Can't run report showing contribution data for both donors and non-donors
- Need better search builder functionality to exclude factors and more easily choose multiple factors
- Searches and reports don't include First Gift and Last Gift data
  - Also want to be able to display this info to donors on a contribution page, and customize gift strings

- Want event registration systems that allows someone to RSVP that they are not attending (and possibly want to make a gift).
- Want to soft credit a gift to more than one person
- Want to set up automatic soft credits between two contacts
- Limited token data available in email receipts (want to add soft credit and PCP information).

# Baykeeper Enhancements

- Detailed contribution report with mailing information & contribution data
  - Location type of primary address
  - Employer name
  - Groups
  - Soft credit name and id
  - In honor/memory of name
  - Contribution note

# Baykeeper Contributions

**i** Report "Baykeeper Contributions" has been updated.

Report Criteria

### Display Columns

<input checked="" type="checkbox"/> In Honor Of	<input type="checkbox"/> Contact ID	<input checked="" type="checkbox"/> Addressee Name	<input checked="" type="checkbox"/> Greeting
<input checked="" type="checkbox"/> Soft Credit Name	<input checked="" type="checkbox"/> Soft Credit Id	<input checked="" type="checkbox"/> Employer Name	<input type="checkbox"/> Employer Id
<input checked="" type="checkbox"/> Do Not Mail	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> Phone	<input checked="" type="checkbox"/> Street Address
<input checked="" type="checkbox"/> Sup Address 1	<input checked="" type="checkbox"/> Sup Address 2	<input checked="" type="checkbox"/> City	<input checked="" type="checkbox"/> Postal Code
<input type="checkbox"/> Location Type ID	<input type="checkbox"/> State/Province	<input type="checkbox"/> Country	
<input checked="" type="checkbox"/> Contribution Type	<input type="checkbox"/> Transaction ID	<input checked="" type="checkbox"/> Receive Date	<input checked="" type="checkbox"/> Receipt Date
<input checked="" type="checkbox"/> Source	<input type="checkbox"/> Fee Amount	<input type="checkbox"/> Net Amount	<input type="checkbox"/> Non Deductible Amount
<input checked="" type="checkbox"/> Total Amount	<input checked="" type="checkbox"/> Honor Contact ID	<input checked="" type="checkbox"/> Hon/Mem Type	<input checked="" type="checkbox"/> In Honor Of
<input checked="" type="checkbox"/> Note			
<input type="checkbox"/> Groups			

- Donor login page for personal campaign page fundraisers

[Home](#)

[Share](#)

## Your Fundraising for Baykeeper

[View](#) [Edit](#) [Clone](#)

### Your Personal Fundraising Pages

[Gwendolyn's Page for Baykeeper](#) (Click to view or edit)

### Your Contributors

Name	Email	Date Received	Amount	Street	City	State	ZIP	Source
Eliet Henderson	eliet@baykeeper.org	2011-09-08	\$5.00	[REDACTED]	SAN FRANCISCO	CA	94103	Online Contribution: Gwendolyn's Page for Baykeeper
Eliet Henderson	eliet@baykeeper.org	2011-09-08	\$5.00	[REDACTED]	SAN FRANCISCO	CA	94103	Online Contribution: Gwendolyn's Page for Baykeeper
[REDACTED]	[REDACTED]	2011-05-19	\$70.00	[REDACTED]	Oakland	CA	94610	Online Contribution: Help Baykeeper Protect the Bay With Your Contribution
[REDACTED]	[REDACTED]	2010-12-31	\$25.00	[REDACTED]	SAN FRANCISCO	CA	94114	Online Contribution: Help Baykeeper Protect the Bay With Your Contribution
[REDACTED]	[REDACTED]	2010-06-11	\$50.00	[REDACTED]	Duncanville	TX	75116	PersonalContact
[REDACTED]	[REDACTED]	2008-03-06	\$25.00	[REDACTED]	Oakland	CA	94610	Vehicle

- Take Action form submission using CiviCRM Webform Integration module

## Our Work

[Sick of Sewage](#)

[Controlling Storm Water](#)

[Climate Change Adaptation](#)

[Protecting Wetlands](#)

[Containing Vessel Pollution](#)

[Regulating Toxic Pollutants](#)

[Preventing Industrial Chemical Pollution](#)

[Protecting Fish and Marine Life](#)

[Defending the Delta](#)

[Donate >>](#)

## Newsletter

Get our monthly newsletter delivered to your inbox.

# Action Alert: Urge Senator Feinstein to Stand Up for Waterways

You are viewing this form as Eliet Henderson. Please [click here](#) if that's not you.

[View](#) [Edit](#) [Webform](#) [Results](#) [CiviCRM](#) [Clone](#)

*Take action to help protect waterways around the nation*

This month the U.S Senate will consider appropriations bills that include a series of riders designed to eliminate key environmental protections for water quality and wildlife across the country. Please urge Senator Feinstein to continue standing up for the Clean Water Act and healthy waterways.

Complete the form below to urge Senator Feinstein to vote against bad appropriations riders.

**First Name: \***

**Last Name: \***

**Email: \***

**Email Type: \***

**Street Address: \***

Please enter your home address.

**City: \***

**State: \***

**Zip Code: \***

**Zip Code +4 Suffix:**

**Your message to Senator Feinstein [sample text provided]:**

Dear Senator [Feinstein](#):

I am writing to urge you to oppose the current efforts underway in the Senate Committee on Agriculture, Nutrition and Forestry to amend the Federal Insecticide, Fungicide, and [Rodenticide Act \(FIFRA\)](#) either through S.718 introduced by Senator Roberts or through a Senate version of House bill HR 872, the so-called "Reducing Regulatory Burdens Act."



## Eliet Henderson


Responded to Action Alert

### Took Action

Added By	Henderson, Eliet
With Contact	<a href="#">Henderson, Eliet</a>
Assigned To	
Subject	Action Alert: Tell Senator Feinstein to Stand Up for Waterways
Campaign	
Engagement Index	
Location	
Date	September 29th, 2011 11:32 AM
Duration	
Status	Completed
Details	<a href="#">View Webform Submission</a>
Priority	Normal

Package

 Edit

 Delete

Done



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