HAYWOOD BURNS INSTITUTE
JUSTICE. FAIRNESS. EQUITY.

> "As an organization invested in a community-centered approach to transforming the administration of justice in the most disenfranchised communities. The Plative team helped us build a Salesforce platform that allows us to stay connected with our key stakeholders and ensure we can work toward a society that believes in justice, fairness, and equity."

Sharoia Taylor-Cornejo
Senior Manager of Operations

The W. Haywood Burns Institute (BI) is a black-led national non-profit with a diverse team of bold visionaries, working to transform the administration of justice. Always challenging racial hierarchy and the social control of communities of color by the justice sector and other public systems, BI employs strategies and tactics to establish a community-centered approach of justice administration that is anchored in structural well-being.

The Burns Institute is an organization that has made an enormous impact in their community, dedicating themselves to many different projects and initiatives throughout the US. This resonated heavily with the Plative team, in particular our non-profit practice, as we recognize the importance of efficient and reliable project management capabilities. Not to be siloed with just operational change, the team has also explored expanding their revenue streams with their growing Development and Fundraising team, in order to better empower their team's strategic efforts.

PLATIVE

Plative is a Salesforce Implementation partner as well as an Oracle NetSuite Alliance Partner. As a global consultancy, Plative builds long-lasting partnerships with some of the world's most recognizable organizations to support and augment their missions.

Business Case

The Burns Institute approached Plative to build an all-encompassing program management system which would enable them to eliminate the use of spreadsheets for tracking incoming grants and funding as well as progress on the execution of their program objectives. Having operated primarily out of spreadsheets, the organization required support from Plative to optimize their workflow and future-proof their systems for ongoing growth. Additionally, with the focus on driving their own fundraising efforts, the Burns team recognized the need for a true donor management CRM.

Solution

Using the **Salesforce Program Management Module**, as well as a custom configuration of projects and milestones specific to Burns Institute's programmatic needs, Plative created a program and delivery tracking system that allows billable hours to be accounted for and automatically associated with a specified project. A two-way integration with **Quickbooks** was also developed in order to create easily digestible payment and invoice records for the general ledger. Finally, in leveraging Salesforce **Nonprofit Success Pack**, the Plative team was able to deliver a fully functioning donation management solution all within Salesforce. This allows the organization to track donations, major gifts, grants, and any other philanthropic revenue sources as they expand their outreach. A **Nintex** integration allows them to automatically generate receipts and acknowledgment letters. To round out their efforts, the Burns team also decided to leverage **Salesforce Pardot** for all marketing campaigns and constituent outreach.

Outcomes

By implementing this Salesforce Nonprofit Cloud, Pardot, and Nintex solution, contractors and consultants can now submit their own time cards, with automated hourly billing and payment against a Project record. Project milestones and KPIs are now organized in one centralized system, with detailed reporting and dashboards for full visibility into progress, deliverables, and schedules. Lastly, the development team can now automatically track and report on donations from all sources, with quarterly and annual reporting - eliminating the need for donor management to live in Excel.