

## Providing technology to streamline processes and eliminate time-consuming tasks.



**Project Open Hand**  
meals with love

“Heller’s team confirmed our technology selection and delivered as promised on a complex migration and implementation.”

### **Jay Owens**

Director, Infrastructure  
Project Open Hand

The team of skilled nutritionists at Project Open Hand has a deep appreciation of the healing powers of healthy eating, and has harnessed them into an amazing program that provided 1,040,000 meals in 2014. What started with one passionate grandmother who wanted to help fight the AIDS epidemic in 1985 has grown into a vast effort engaging over 100 volunteers each day. Delivering over 2,500 meals and 200 bags of groceries daily, Project Open Hand serves the Bay Area’s most vulnerable citizens who are fighting serious illness, isolation, and the challenges associated with old age.

### **Existing Challenges**

Volunteers are the heart of this organization, pumping love and healing powers into each meal that they create and deliver. In order to keep them motivated and inspired, it is essential that they can see the fruit of their labor. Project Open Hand supports a policy of full transparency with their volunteers, and to do so requires detailed coordination across each step of the process.

Coordination, in fact, is the hub of the wheel that powers Project Open Hand. With 125 daily volunteers, a fully functional grocery center, an indoor green house, seven different meal plans, and hot meal delivery/pick up service, the Project Open Hand staff has their hands full. In order to juggle all of these elements while maintaining the best possible care of their clients, Project Open Hand needed a powerful, innovative system to streamline their efforts and eliminate inefficiencies.

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For some time, Project Open Hand was using multiple, disconnected systems to manage interactions with clients, volunteers, and donors, but none of them were meeting their needs. Each system had issues: lack of basic functions, inability to create necessary reports, limited/no technical support, etc. These problems were not only creating unnecessary delays and challenges, but were also roadblocks, preventing Project Open Hand from truly understanding critical connections between donors and volunteers.

## Finding the Right Solution

As the Project Open Hand team searched for a solution to their organization's issues they started talking with Heller Consulting about what technology was currently available. They were interested in switching to a Salesforce Platform, specifically to Volunteers for Salesforce and NGO Connect. Heller spent time with Project Open Hand, developing a deep understanding of the organization's struggles; their hopes for new technology, and their goals for what a new system would help them achieve. After seeing the level of cross-department integration and collaboration the team would need, Heller confirmed that Volunteers for Salesforce along with NGO Connect would be the best option. This would allow Project Open Hand to not only gain the 360-degree organization view that is built-in to NGO Connect, but it would also allow them to gain the integration flexibility that is the underlying power of the Salesforce

platform, connecting information across each segment of the organization.

By working together, Heller and Project Open Hand came up with a strategic implementation plan to smoothly transition Project Open Hand onto a single, cohesive system, and to streamline and optimize the inter-related aspects of the organization's business processes. To ease the transition, Project Open Hand utilized Heller's change management methodology to ensure that staff and departments were informed of what was coming, and how it would impact them through each step of the process. As the technical implementation and training process was completed, the team was ready for the official go-live making it a clear success.

## Seeing the Results

By eliminating outdated technology and moving onto the innovative Salesforce Platform, Project Open Hand has eliminated many time-consuming processes and connected previously siloed segments of the organization. They now have the ability to access reports that are automatically updated each day – a process that used to involve hours of manual calculation. In addition, they can show each volunteer exactly how their time impacted the clients, motivating them to continue working with Project Open Hand.

Quickly, the value of accurate reporting and a clear 360-degree view of their organization became evident, as Project Open Hand un-

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covered a clear overlap: almost 25% of their volunteers are also donors! With a deeper understanding of their constituents, the organization can better tailor their strategy and messaging to speak directly to the concerns of their audience.

By updating their systems to a connected platform that fits their needs and goals, Project Open Hand can spend less time wrestling with their system and focus on their mission: healing people with healthy food. Heller Consulting is proud to have been a part of this experience, and looks forward to seeing what Project Open Hand will achieve this year. For more about this project please contact Heller and visit the Salesforce Foundation project overview here: <http://sforce.co/1FN2cye>.

## For More Information

For this project Heller was able to combine their extensive experience and technical skill as well as their deep understanding of the strategic needs of a nonprofit organization to create a sophisticated and effective solution.

For more information on this project or others, please contact us. From streamlining and optimizations to full system and strategy implementations, Heller can help your organization become more efficient and effective at delivering on your mission.

**Contact us today.**

**510-841-4222 x153**

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Heller's experienced team of nonprofit experts has a clear method for helping you determine your organization's needs, and then can work with to you to create the right solutions built on proven technology and strategies. We specialize in software and strategies that are designed to work flexibly with your organization, and we work across full system life cycle:

- CRM (Constituent Relationship Management) Roadmaps and Strategy Planning
- Software Evaluation and Selection
- Business Process Streamlining and Documentation
- Data Migration and Consolidation
- Product Training and End-user Education
- Full and Phased CRM Implementations
- Online, digital and web-based creative
- Campaign and organization-wide strategic and implementation services

Our staff has worked on the front lines of nonprofits around the country, and we understand how communication, fundraising and mission management software is used on a daily basis. Let us help your organization make the most of your technology investment. Find out more about our team and what we can do for you at:

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