

Oakland Promise

Oakland Promise has an audacious goal: Ensure that every child in Oakland graduates from high school and has the skills to succeed in college and in the workplace. To accomplish this goal, they needed a great database to track the children and all their services. Dayspring was there to help them grow and develop.

The Partnership

When Dayspring first engaged with Oakland Promise in 2017, they were a fledgling nonprofit. We helped them develop their CRM plan, data model, and Salesforce implementation for their initial program. This partnership continued on as ongoing support with bi-monthly calls until their second program was ready for their own implementation. Our support allowed them to seamlessly manage the departure of their primary data manager and Salesforce administrator and onboard a newly hired staff member for that role. As their organization continues to grow and mature, so too will our partnership.

The Challenge

Oakland Promise needed to develop a database for Brilliant Baby, a new program which would serve 1,500 babies in Oakland in the first three years. This database needed to track children, their families, and the assessments and services provided to them directly and through coaches at partner organizations. They needed a streamlined intake process that would assign coaches seamlessly. Coaches needed an easy way to track their caseload, and the system needed to be easy to use. Additionally, financial institution data from their college savings account provider needed to be brought into their database.



The Project

First, Dayspring implemented Salesforce with the Nonprofit Success Pack, configuring Salesforce to track children, families, and the services provided to them. In addition, Salesforce Console and Lightning pages were configured to improve user experience. Next, FormAssembly forms were created to bring survey and assessment data into Salesforce. Salesforce was further configured to accept Child Savings Account (CSA) data, and a data import process was developed to bring in CSA data provided by different financial institutions. Finally, Dayspring provided training to Oakland Promise staff to ensure smooth adoption of the new system.

With the help of Dayspring Partners, babies in Oakland are being placed on a path to success. Families are receiving the support they need. Coaches from partner organizations are able to easily monitor coaching progress. Oakland Promise is able to track progress and measure their program's effectiveness. College admission directors rejoice! In years to come, many more students from Oakland are headed your way.

Technologies

Form Assembly App, Lightning Pages, Process Builder, Salesforce, Salesforce Console, Salesforce Nonprofit Success Pack

“We were honestly shocked when our implementation of the system went off almost without a hitch – not because we were surprised Dayspring was so good at this, but because in our world nothing seems to go off without a hitch. They were extremely creative in creating something that worked with our somewhat esoteric data model, and they were so responsive in making major changes given (sometimes spur of the moment) feedback.”

Tim Marlowe

Project Director for Data and Evaluation, Oakland Promise

“It’s been a joy to work with Oakland Promise since their very beginnings. Configuring their Salesforce instance from the ground up while they were still a new nonprofit and collaborating with and training their Salesforce administrator was a rewarding and challenging experience. Over the past years, we have expanded their use of Salesforce from one program to two programs and worked with a wide array of staff along the way. Our partners at Oakland Promise are so fun, dedicated, and amazingly sharp – it’s an honor to work with them.”

Jessica Kwok

Salesforce Principal, Dayspring Partners