

The Bob Woodruff Foundation overhauls its legacy system for future growth

The past can be a burden on an organization's plans for the future

Recently, the Bob Woodruff Foundation (BWF) faced significant operational challenges with its legacy Salesforce environment. Years of patchwork fixes had created a system that was difficult to manage and nearing obsolescence as Salesforce phased out support of certain functions.

"The platform had become a disjointed system," says Keith Whitcomb, senior director of operations for BWF. "There had been all these add-ons and workarounds, and there wasn't a good way to work with the system. So, we knew we had to transition to a new platform."

BWF is a nonprofit organization dedicated to ensuring that veterans, service members and their families have stable and successful futures. The foundation invests in programs and services that address the needs of these communities. BWF partners with organizations nationwide to support veterans in areas such as mental health, education, employment and legal services.

To modernize its technology, clean up its data and prepare for future growth, the foundation brought in RSM to upgrade the nonprofit's system.

Clear goals

RSM assessed the foundation's data environment and designed a migration path to a more reliable platform. BWF's old system made reporting unreliable and created inefficient workflows, especially when it came to grant application intake and fundraising management. Users of the system also had trouble accessing organized, relevant data.

"RSM was really all hands on deck," says Matthew Bernardino, operations specialist and Salesforce administrator for BWF. "They prioritized high-priority projects to get us into a better state quickly. Communication was important. They were transparent with us and showed that they understood where the disconnect was and how we could fix it."

The engagement focused on stabilizing operations by transitioning the system to a stronger platform, which would also ensure long-term technical viability for the foundation. In addition, RSM wanted to improve BWF's data quality and processes to enable more strategic decision making.

"We started this relationship with trust up front," Whitcomb says. "We said either we're going to be all in or we're not. RSM said yes to that, and their communication with us has been clear the whole time. That builds a good relationship, and relationships matter with big projects like this."

The new system

BWF soon realized significant improvements. The new platform improved billing clarity, providing detailed invoices that showed where resources were going. Furthermore, the foundation's employees appreciated the more user-friendly system, which gave the organization a standardized data lexicon that eliminated confusion across teams.



"Our data needed to be assessed, and RSM was up to the task," says Bernardino. "And I've heard nothing but positive feedback about how people interact with the new system." In the longer term, the transformation delivered several lasting benefits. With better data, BWF achieved more reliable reporting, which in turn led to more informed fundraising and programmatic decisions. In addition, the new platform streamlined the grant-application procedure, resulting in a smoother process for applicants.

When issues arose—often tied to Salesforce platform changes rather than project missteps—the RSM team provided immediate updates, reset timelines where necessary and communicated with BWF about potential solutions.

"RSM really wanted to see us succeed," Whitcomb says. "It's not about just billing hours to them, and we appreciate that."

Looking forward

RSM will continue to help BWF strengthen its fundraising and program delivery. Upcoming initiatives include exploring artificial intelligence capabilities in Salesforce to further enhance grantmaking and donor engagement.

Moving from a fragmented system to a robust platform positioned BWF for long-term growth. With a solid foundation and enhanced platform security in place, the nonprofit has become more efficient and is better positioned to serve its stakeholders.

Bernardino says RSM's emphasis on technical knowledge and clear communication has made a huge difference to the foundation, and he says the strong relationship between the organizations has been essential to the process.

"We would not have wanted to do this project with anyone else," Bernardino says.

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