

Navigating Salesforce Nonprofit Cloud go-live considerations



Presenters



Jamie Van Nostrand

**Director, Nonprofit
Relationship Management**
RSM US

- Nearly 20 years' experience in nonprofits as a fundraiser and development operations director
- Has been in the Salesforce ecosystem for 10 years
- Extensive knowledge of nonprofit operations, data strategy, CRM implementations, and project management

Presenters



Lou Bialon-Crane

**Manager, Nonprofit
Relationship Management**
RSM US

- 8x Certified Salesforce Solution Architect
- Nearly ten years' experience delivering solutions to nonprofit, higher education, and healthcare and life science organizations.
- Background in nonprofit operations and fundraising, with a deep understanding of nonprofit processes and intricacies.

The firm - RSM







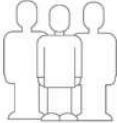





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 <p>RSM US is one of the leading Salesforce consulting partners focused on the middle market</p>	 <p>AVERAGE RATING</p> 	 <p>INDUSTRIES Nonprofits & Associations Technology -TMT Manufacturing - Industrials Business & Professional Services - BPS</p>
 <p>4.9/5</p> <p>CSAT RATING SALESFORCE PARTNER PROGRAM</p>	 <p>800+ Salesforce customers</p>	 <p>Global and regionally based Salesforce team members</p> <ul style="list-style-type: none"> • Architects • Consultants • Developers • Project Managers
	<p>Engagement Models Assessments Scoped Projects Retained Teams</p> 	<p>400+ Salesforce Certifications</p> 
 <p>Salesforce Partner Since 2009</p>		

The problem

- Impact reporting is cumbersome
- Outcomes management is crucial for both individuals and programs at large
- Multiple disparate systems





The case study

Catholic Social Services in
Edmonton, Alberta, Canada (CSS)



- Multi-year digital transformation
- Individual outcomes management
- Program and agency outcomes management
- Internal decision making
- Grants reporting
- Impact reporting



Products



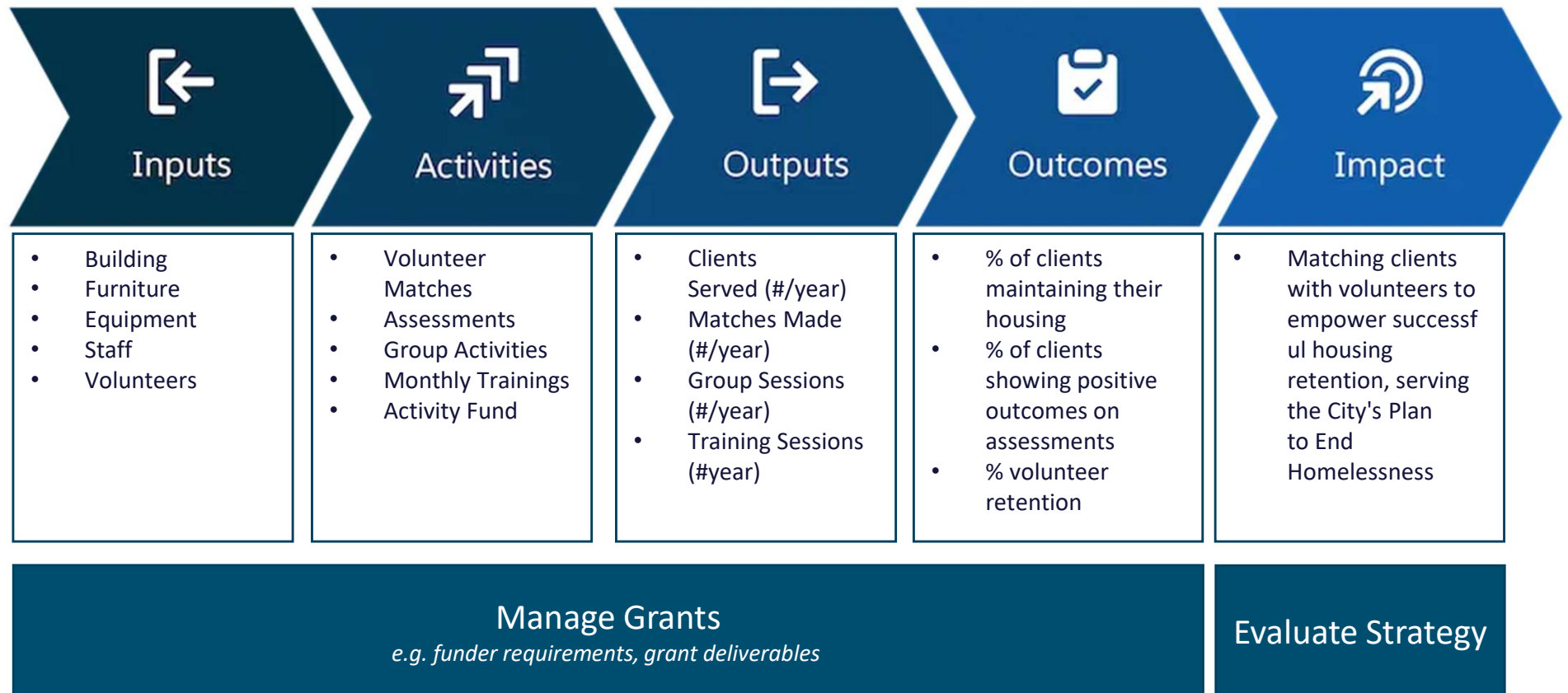
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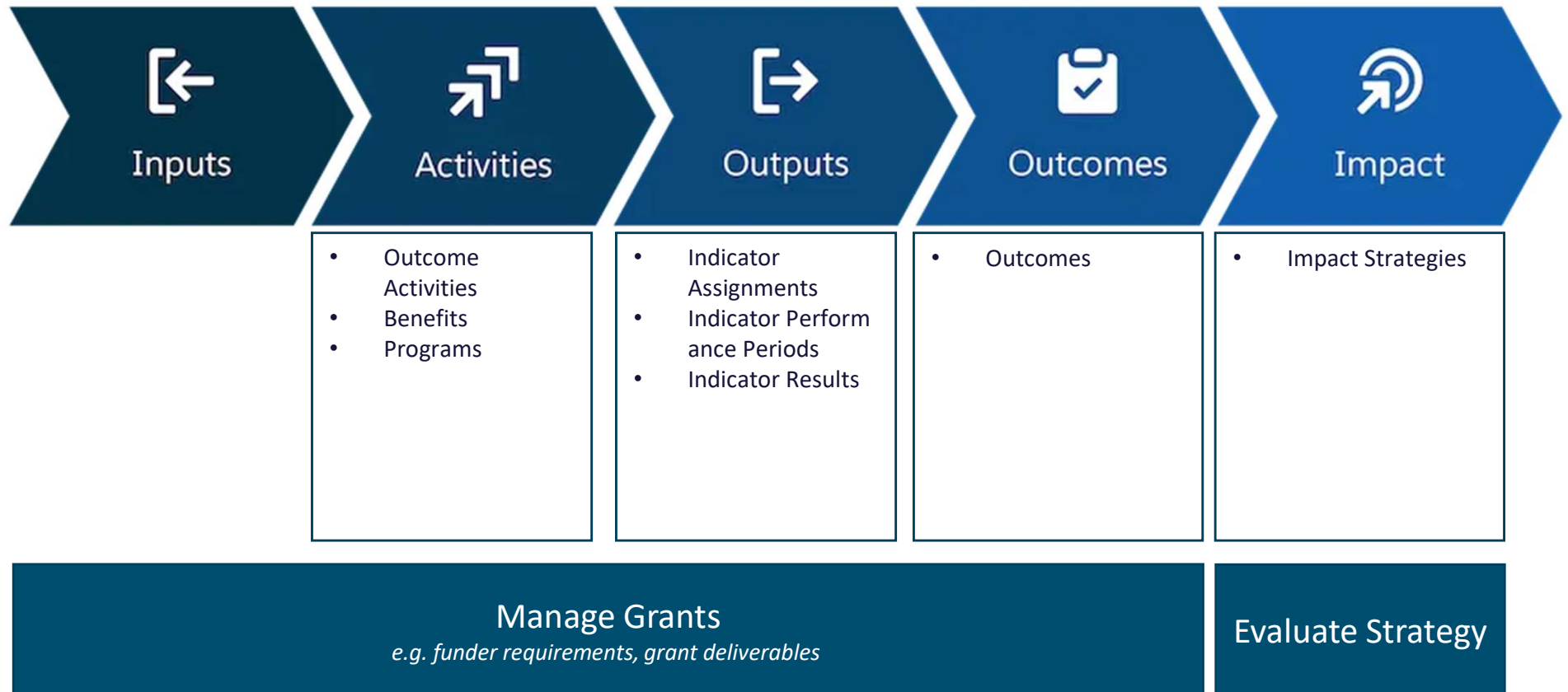
Tips for planning the project

- Planning and design
- Implementation
 - Phased approach
 - Team structure
- Hypercare

Program logic model



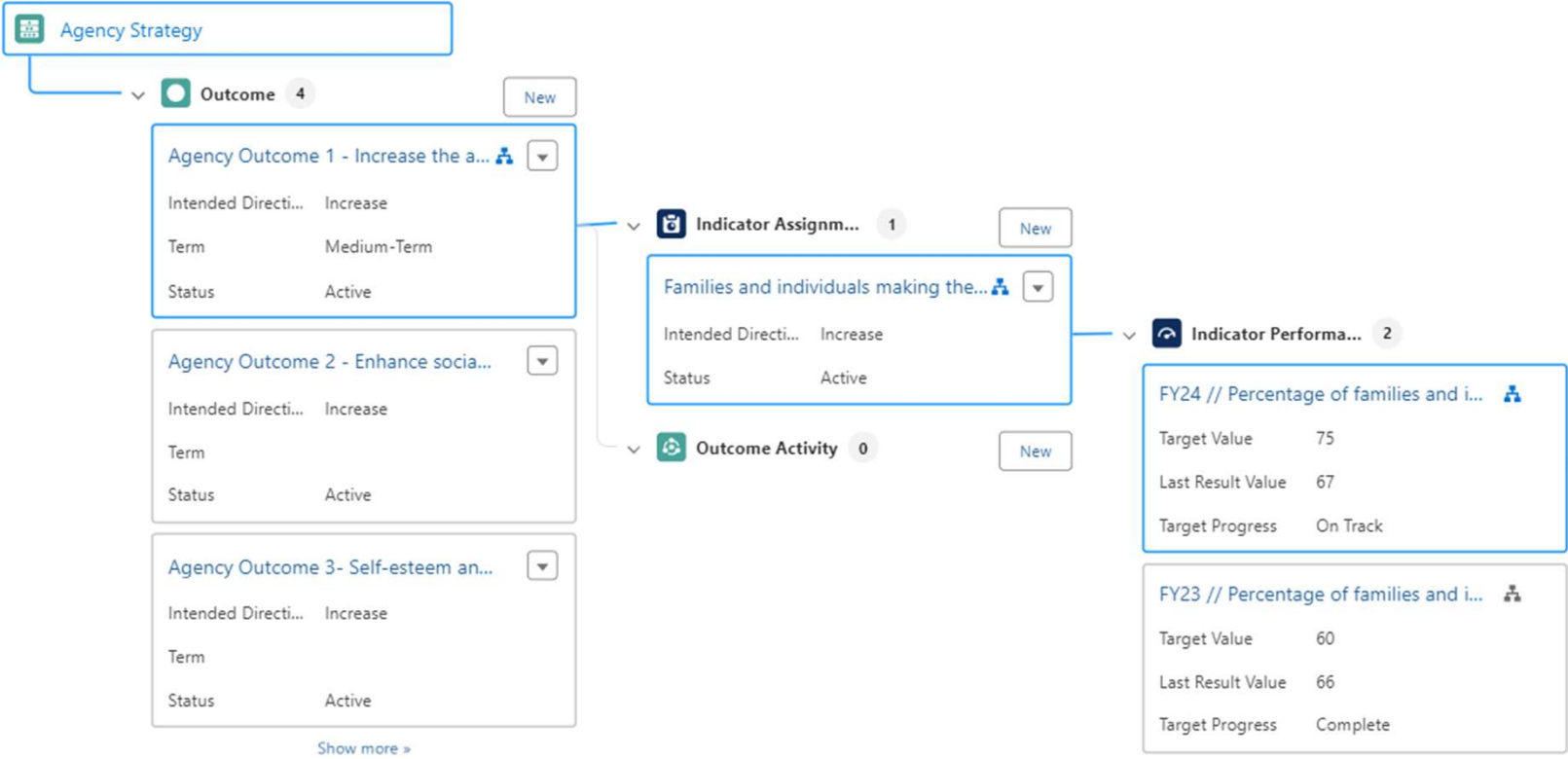
Salesforce impact management



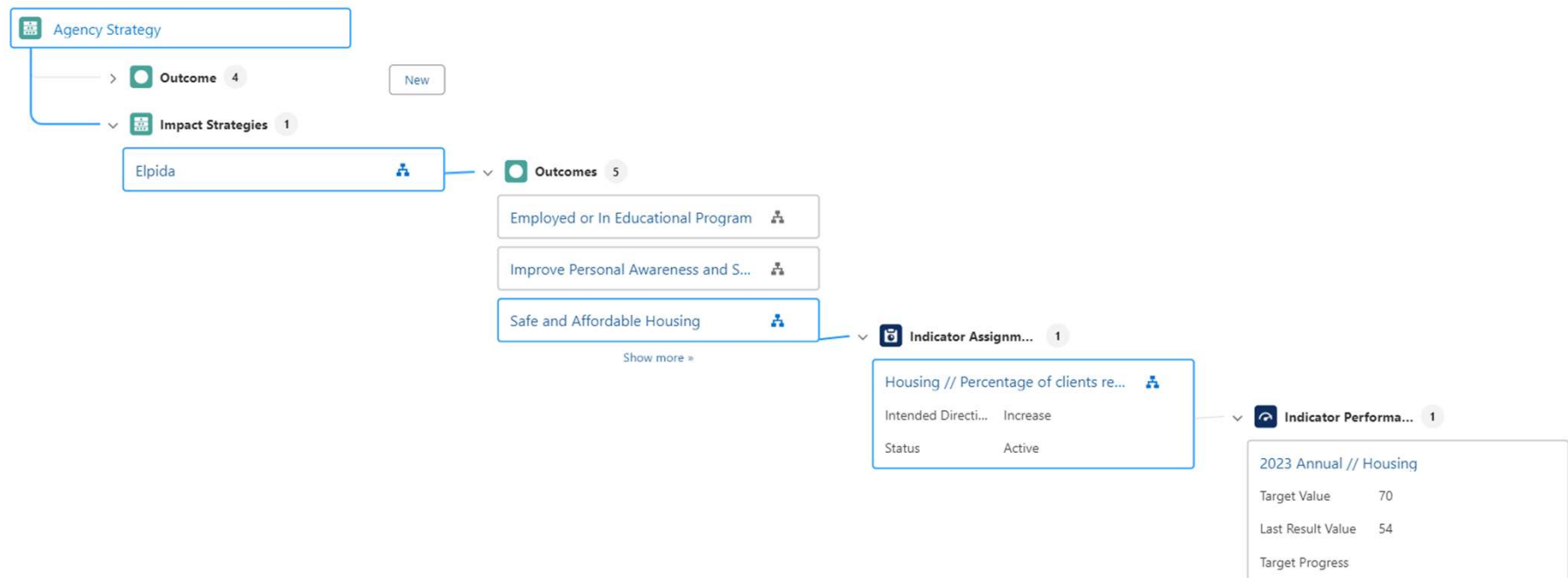
Impact strategies

- Impact strategies gather outcomes and represent them in a logic model.
 - An outcome can be a part of one or more impact strategies.
- On an impact strategy record, we can see a visual representation of impact strategy.

Agency impact strategy



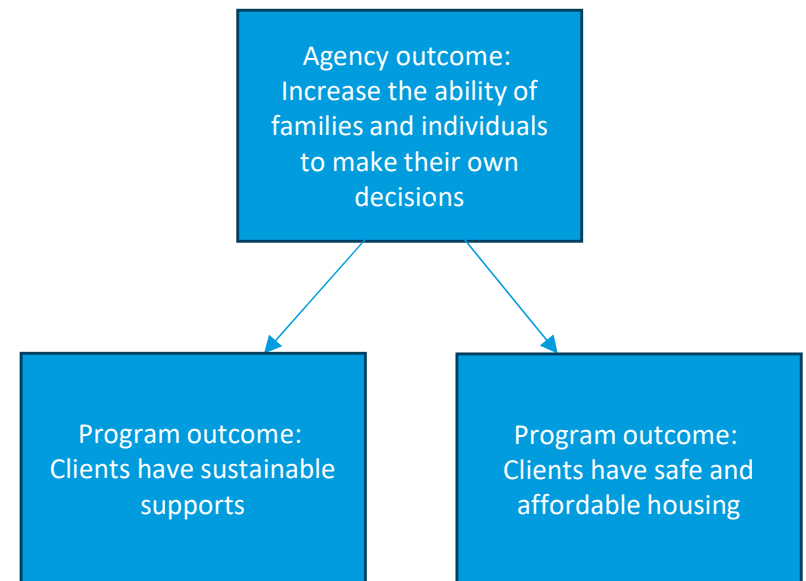
Impact strategy hierarchy



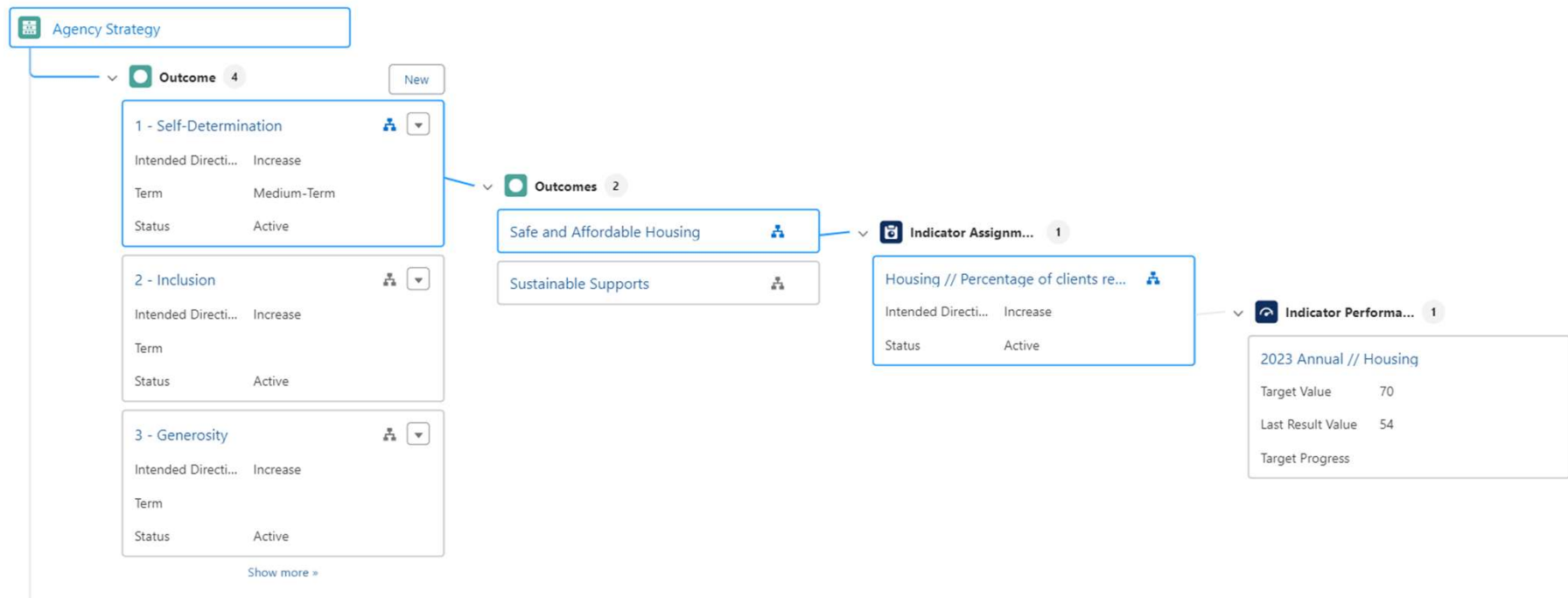
Outcomes

CSS tracks outcomes at two levels:

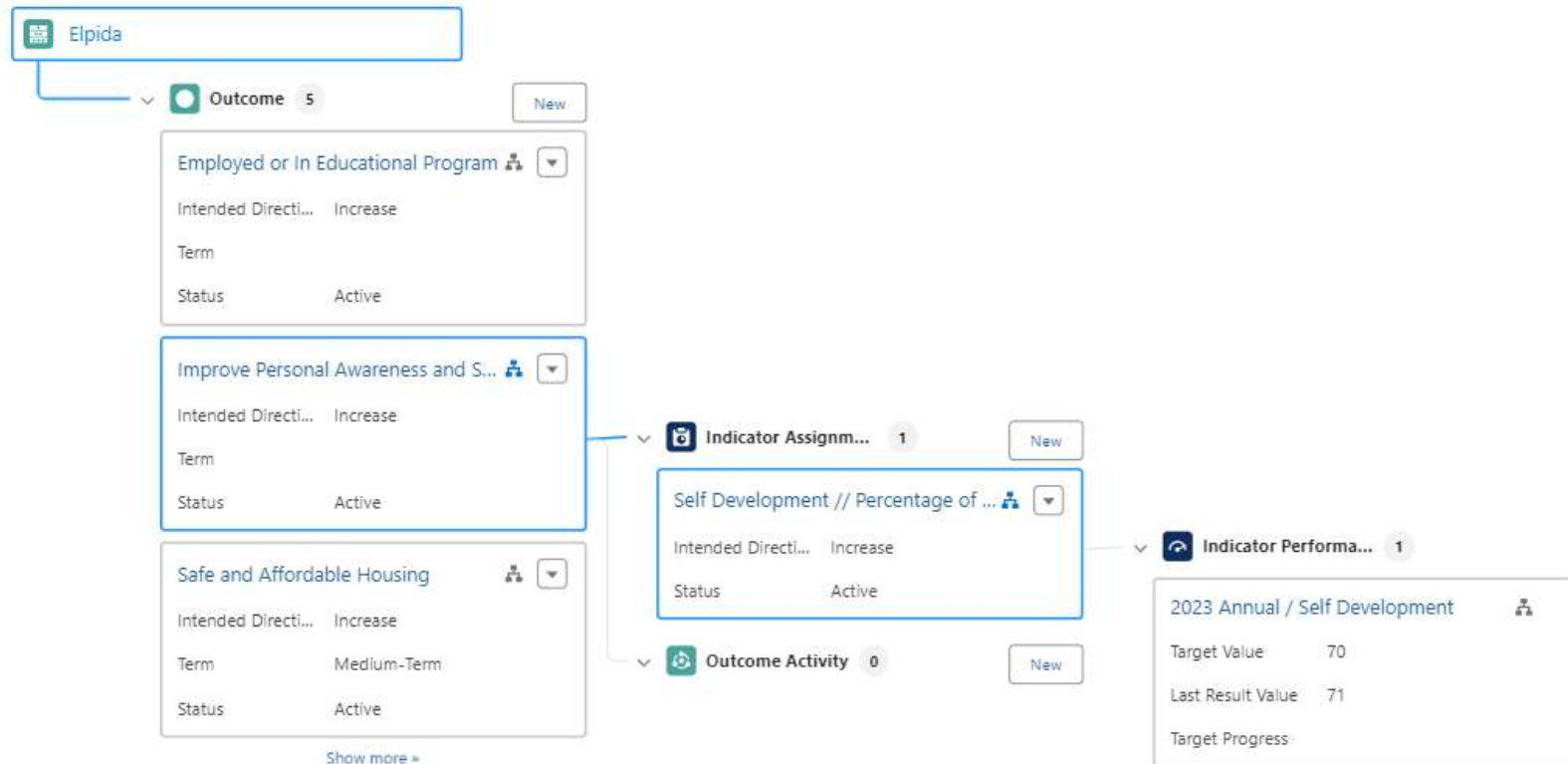
- Overall agency outcome
- Program outcome
 - Each program outcome is nested under an agency outcome in a hierarchical relationship
 - Based on our solution, individual client progress will roll up to program-level results, which in turn will roll into agency-level results



Outcome hierarchy



Program impact strategy



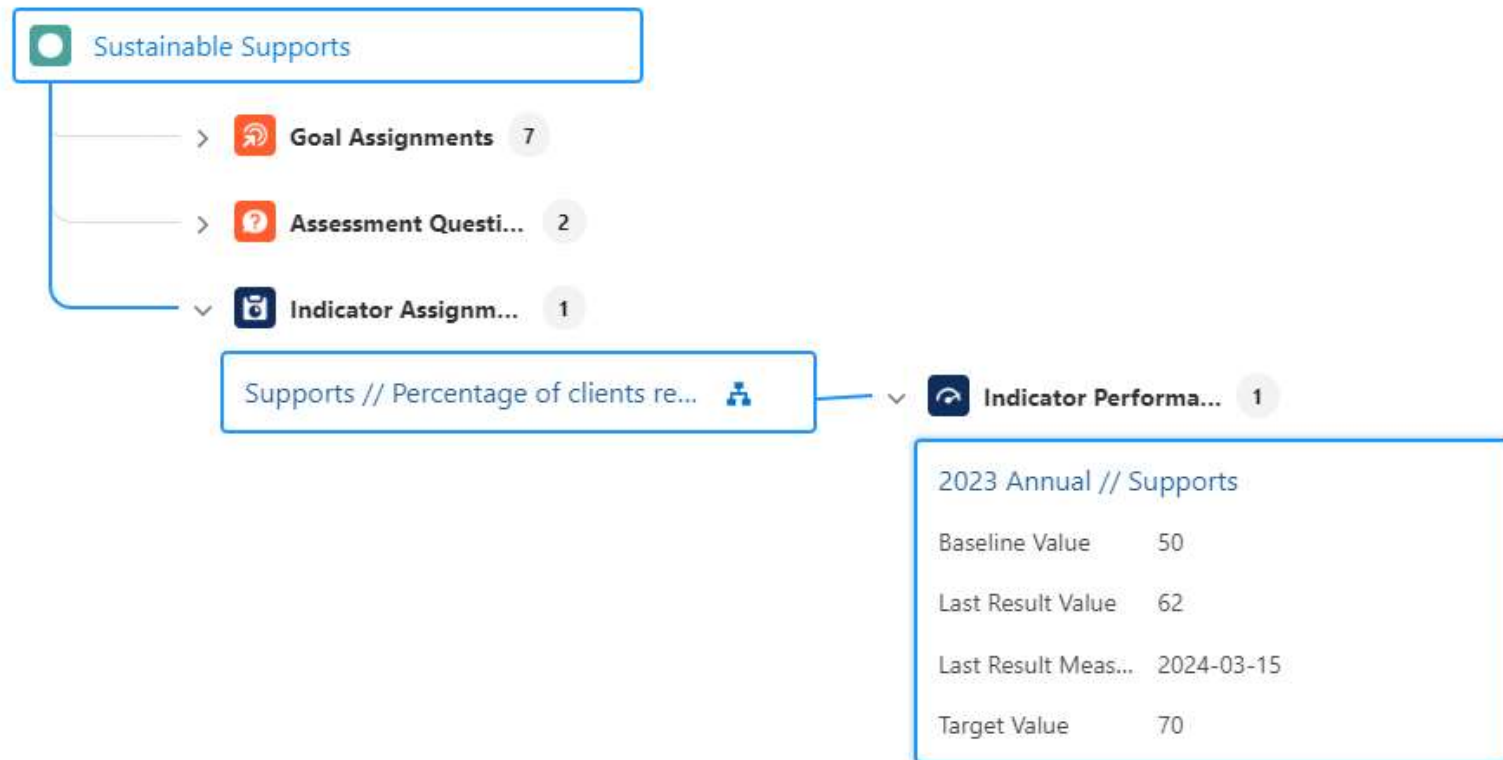
Program indicators

Indicators can be created to track agency and program metrics, such as:

- Number of women admitted into an agency shelter each month
- Number of constituents referred to other agencies
- Percentage of clients served fitting a target demographic

Funder required reports and statistics can be created as indicators, and flows can be set up to automatically calculate these metrics on a regular basis based on system data.

Program outcome monitoring



Individual progress indicators

Nonprofits exist not just to report to funders, but to provide and demonstrate impact with the individuals and communities they serve.

Individual indicators may look like:

- Whether a client was discharged from care with successful outcomes
- Whether a client showed improved scores on assessments
- Whether a client made successful connections with other agencies
- Whether a client needed to return for additional services
- How many and how often critical incidents occurred for a client

Tips and tricks: individual progress indicators

By carefully defining indicators that measure the mission and work an organization does, you can set up Salesforce to measure these outcomes for them!

For this client, we:

- Linked assigned client goals to program outcomes
- Linked assessments questions to program outcomes
- Linked assessment question responses to outcomes and goals to track individual progress towards their self-defined goals

Individual outcome monitoring

Quarterly, progress ratings are captured by case workers for all a client's goals. These are made visible on the client's plan for care to identify risks.

Christina builds connections with her peers.

Quarter	Progress Rating
Q2	0
Q1	1

Total Active Goals:	2
Total Successful Goals:	3
Total Unsuccessful Goals:	1

Christina builds coping skills for stress.

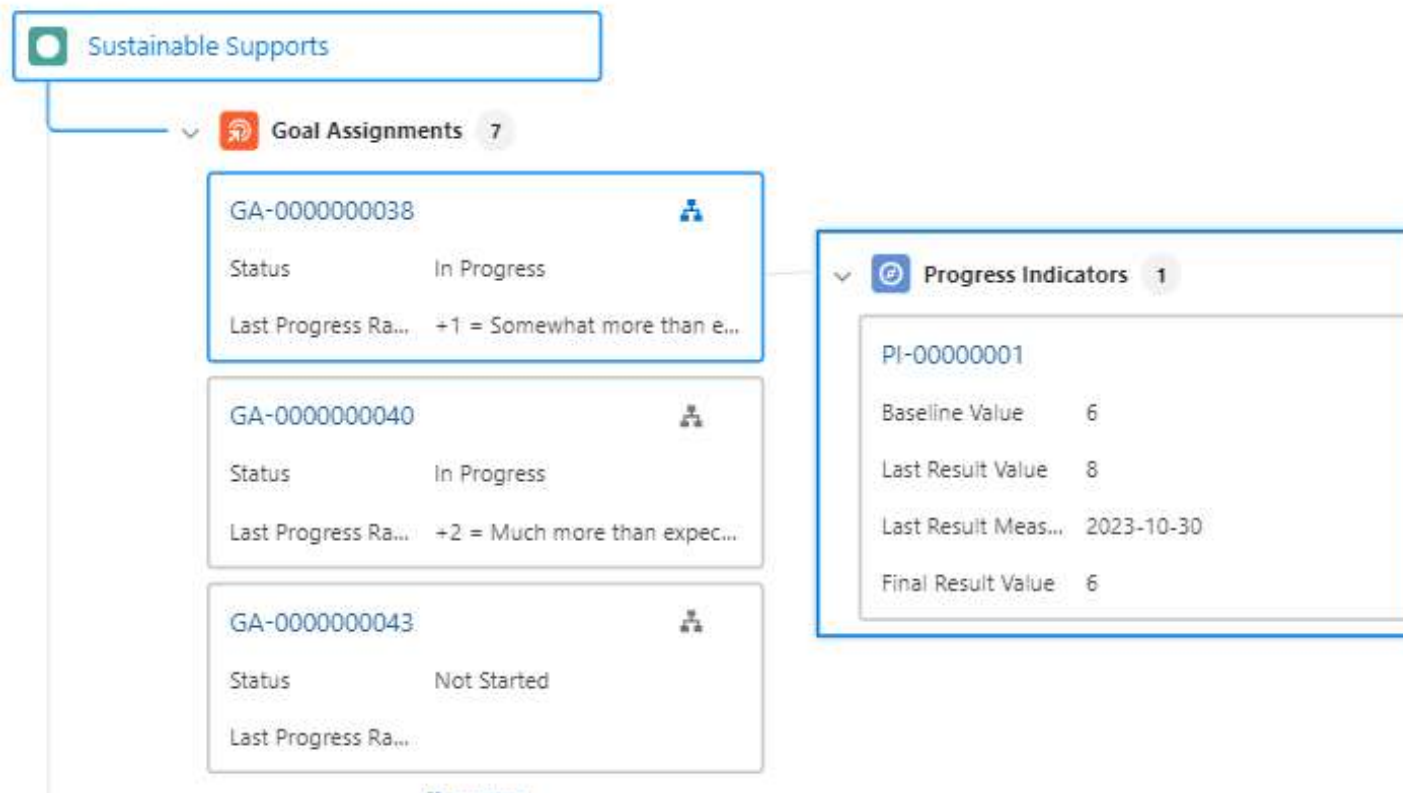
Quarter	Progress Rating
Q2	0
Q1	-1

Individual outcome monitoring

Assessments are also completed by case workers regularly. Scores roll up to a client's care plan to easily identify areas for change in support tactics.

Outcome	Baseline	Last	Last Measure	Final	Progress
Sustainable Supports	5	4	2024-07-01		Low
Improve Personal Awareness and Self Development	5	10	2024-07-01		Positive Change

Program outcome monitoring



The screenshot displays a hierarchical view of program outcome monitoring data. At the top level is 'Sustainable Supports'. Underneath, 'Goal Assignments' (7 total) are listed. Three goal assignments are visible, each with a status and a last progress rating. A 'Progress Indicators' (1 total) section is also shown, detailing a specific indicator with baseline, last result, and final result values.

Goal ID	Status	Last Progress Rating
GA-0000000038	In Progress	+1 = Somewhat more than e...
GA-0000000040	In Progress	+2 = Much more than expec...
GA-0000000043	Not Started	

Indicator ID	Baseline Value	Last Result Value	Last Result Meas...	Final Result Value
PI-000000001	6	8	2023-10-30	6

Progress and aggregate reporting



Report: Progress Indicators with Outcome
2023-10-30 Sustainable Support Progress

Total Records Total Baseline Value Total Last Result Value
 7 32.00 48.00

	Goal Assignment	Progress Indicator: Progress Indicator Name	Outcome: Name	Baseline Value	Last Result Value	Last Result Measurement Date
1	GA-0000000038	PI-00000001	The client has sustainable supports.	6.00	8.00	2023-10-30
2	GA-0000000040	PI-00000002	The client has sustainable supports.	5.00	6.00	2023-10-30
3	GA-0000000043	PI-00000003	The client has sustainable supports.	3.00	6.00	2023-10-30
4	GA-0000000044	PI-00000004	The client has sustainable supports.	4.00	7.00	2023-10-30
5	GA-0000000045	PI-00000005	The client has sustainable supports.	4.00	6.00	2023-10-30
6	GA-0000000046	PI-00000006	The client has sustainable supports.	5.00	7.00	2023-10-30
7	GA-0000000047	PI-00000007	The client has sustainable supports.	5.00	8.00	2023-10-30
8				32.00	48.00	

Managing program outcomes

