

Introduction to Salesforce Nonprofit Cloud

Empowering your organization
for impact



Presenters



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RSM

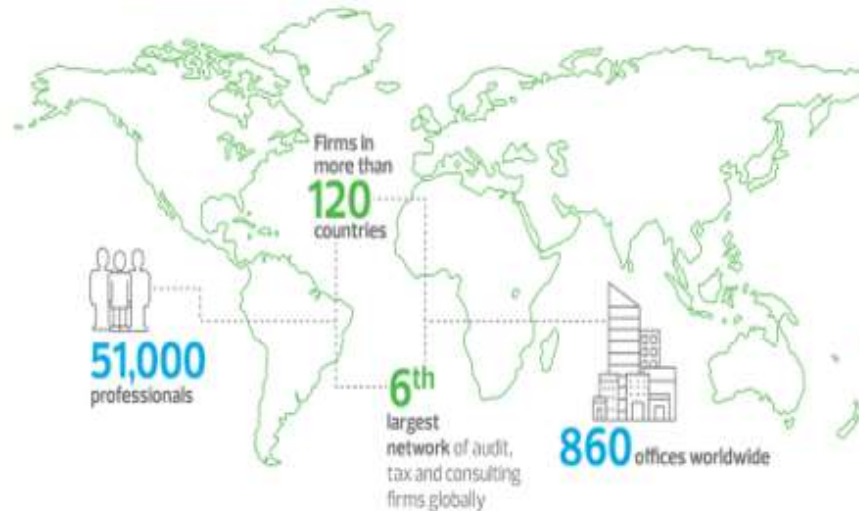
Introductions

The firm - RSM







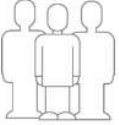





Global reach, national strength, local touch

Business advisors who take time to understand your industry, your goals, your opportunities

RSM International is a **global network** of independent audit, tax and consulting firms.



RSM – a leader in the Salesforce Consulting Partner Ecosystem

 <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>		 <p>Salesforce Partner Since 2009</p>



Agenda

- Introduction
- Grant management
- Program management
- Service provider – direct care
- Contract management and payments



Forward-Looking Statement

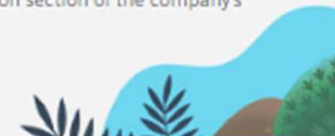
Statement under the Private Securities Litigation Reform Act of 1995:

This presentation contains forward-looking statements about the company's financial and operating results, which may include expected GAAP and non-GAAP financial and other operating and non-operating results, including revenue, net income, diluted earnings per share, operating cash flow growth, operating margin improvement, expected revenue growth, expected current remaining performance obligation growth, expected tax rates, the one-time accounting non-cash charge that was incurred in connection with the Salesforce.org combination; stock-based compensation expenses, amortization of purchased intangibles, shares outstanding, market growth and sustainability goals. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, the company's results could differ materially from the results expressed or implied by the forward-looking statements we make.

The risks and uncertainties referred to above include -- but are not limited to -- risks associated with the effect of general economic and market conditions; the impact of geopolitical events; the impact of foreign currency exchange rate and interest rate fluctuations on our results; our business strategy and our plan to build our business, including our strategy to be the leading provider of enterprise cloud computing applications and platforms; the pace of change and innovation in enterprise cloud computing services; the seasonal nature of our sales cycles; the competitive nature of the market in which we participate; our international expansion strategy; the demands on our personnel and infrastructure resulting from significant growth in our customer base and operations, including as a result of acquisitions; our service performance and security, including the resources and costs required to avoid unanticipated downtime and prevent, detect and remediate potential security breaches; the expenses associated with new data centers and third-party infrastructure providers; additional data center capacity; real estate and office facilities space; our operating results and cash flows; new services and product features, including any efforts to expand our services beyond the CRM market; our strategy of acquiring or making investments in complementary businesses, joint ventures, services, technologies and intellectual property rights; the performance and fair value of our investments in complementary businesses through our strategic investment portfolio; our ability to realize the benefits from strategic partnerships, joint ventures and investments; the impact of future gains or losses from our strategic investment portfolio, including gains or losses from overall market conditions that may affect the publicly traded companies within the company's strategic investment portfolio; our ability to execute our business plans; our ability to successfully integrate acquired businesses and technologies, including delays related to the integration of Tableau due to regulatory review by the United Kingdom Competition and Markets Authority; our ability to continue to grow unearned revenue and remaining performance obligation; our ability to protect our intellectual property rights; our ability to develop our brands; our reliance on third-party hardware, software and platform providers; our dependency on the development and maintenance of the infrastructure of the Internet; the effect of evolving domestic and foreign government regulations, including those related to the provision of services on the Internet, those related to accessing the Internet, and those addressing data privacy, cross-border data transfers and import and export controls; the valuation of our deferred tax assets and the release of related valuation allowances; the potential availability of additional tax assets in the future; the impact of new accounting pronouncements and tax laws; uncertainties affecting our ability to estimate our tax rate; the impact of expensing stock options and other equity awards; the sufficiency of our capital resources; factors related to our outstanding debt, revolving credit facility, term loan and loan associated with 50 Fremont; compliance with our debt covenants and lease obligations; current and potential litigation involving us; and the impact of climate change.

Further information on these and other factors that could affect the company's financial results is included in the reports on Forms 10-K, 10-Q and 8-K and in other filings it makes with the Securities and Exchange Commission from time to time. These documents are available on the SEC Filings section of the Investor Information section of the company's website at www.salesforce.com/investor.

Salesforce.com, Inc. assumes no obligation and does not intend to update these forward-looking statements, except as required by law.



Adapting to Today's Reality

The need for services doesn't stop
Integration and compliance requirements are
ever changing
Staff turnover is at an all time high



Your Services



Your Clients

How can the funding team collaborate with the programs team to achieve desired outcomes, at scale?

 salesforce.org



Provide, Track and Collaborate on Impact, Strategy, and Outcomes



Improve Staff Retention



Adhere to Compliance and Integration Requirements



Nonprofit Cloud

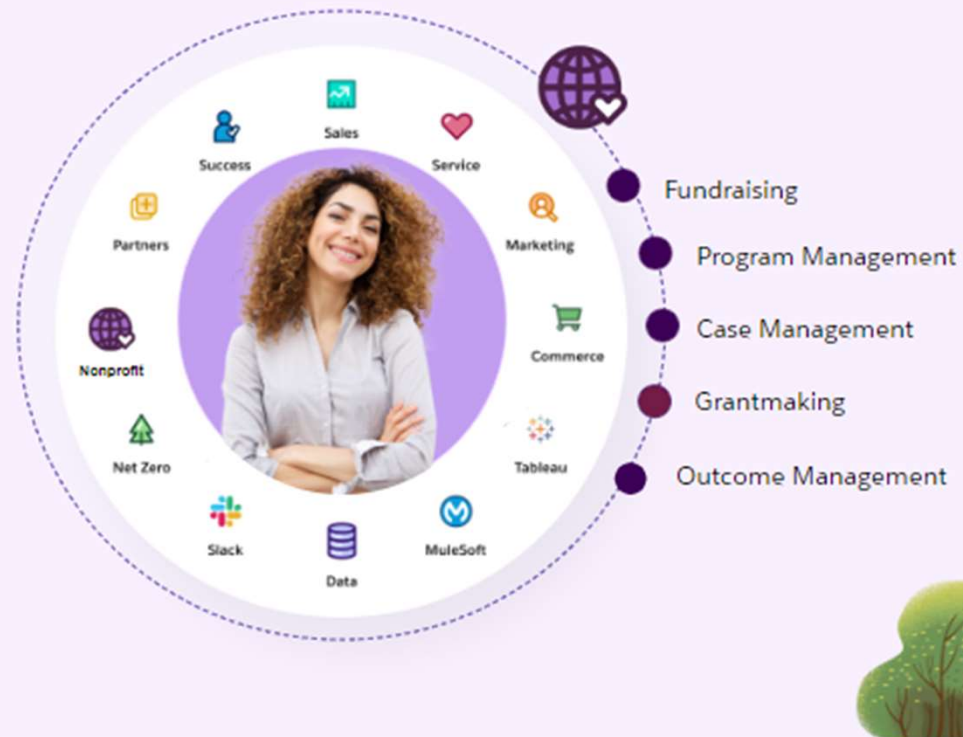
Fund, deliver, and measure your impact



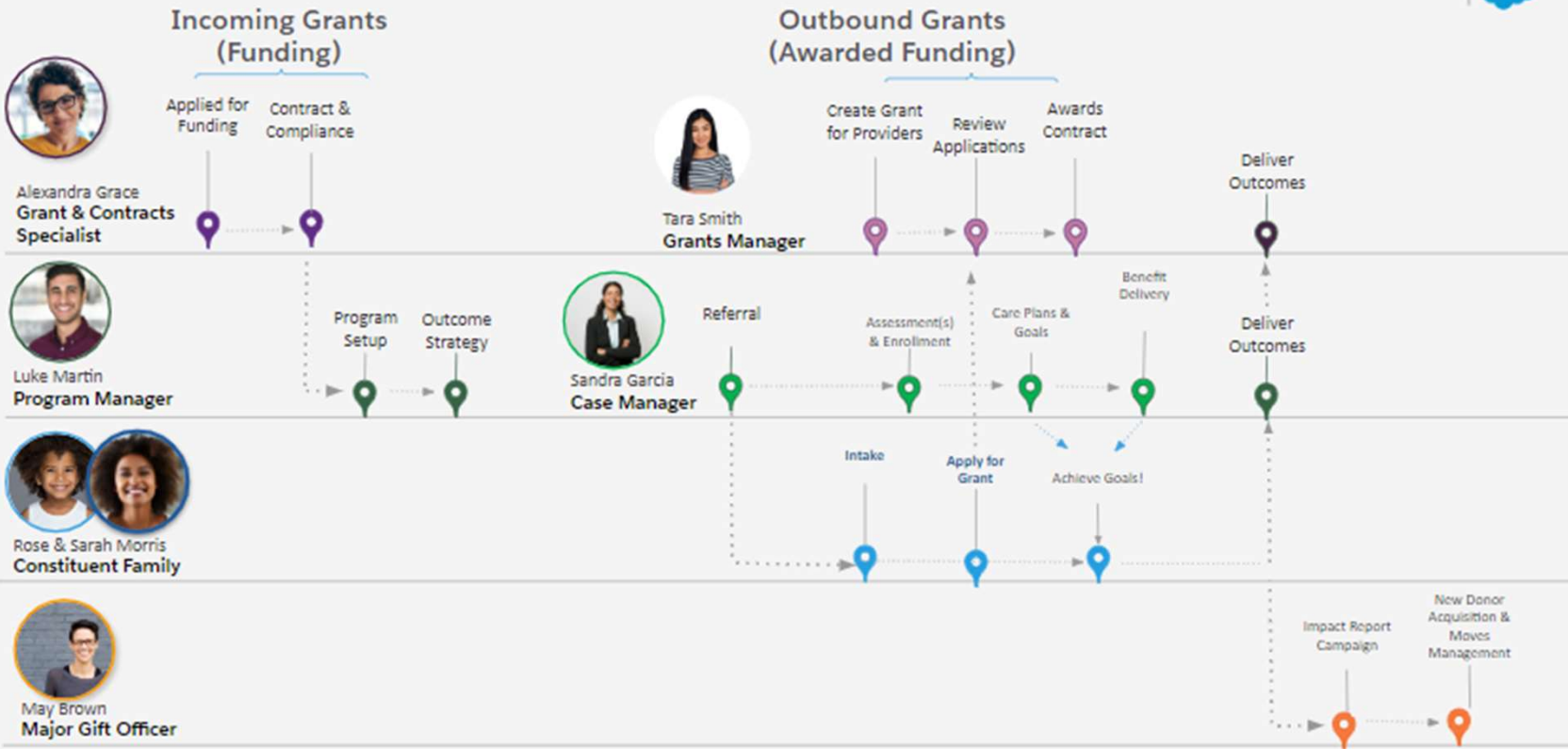
Nurture All Stakeholder Relationships

Empower Data-driven Work

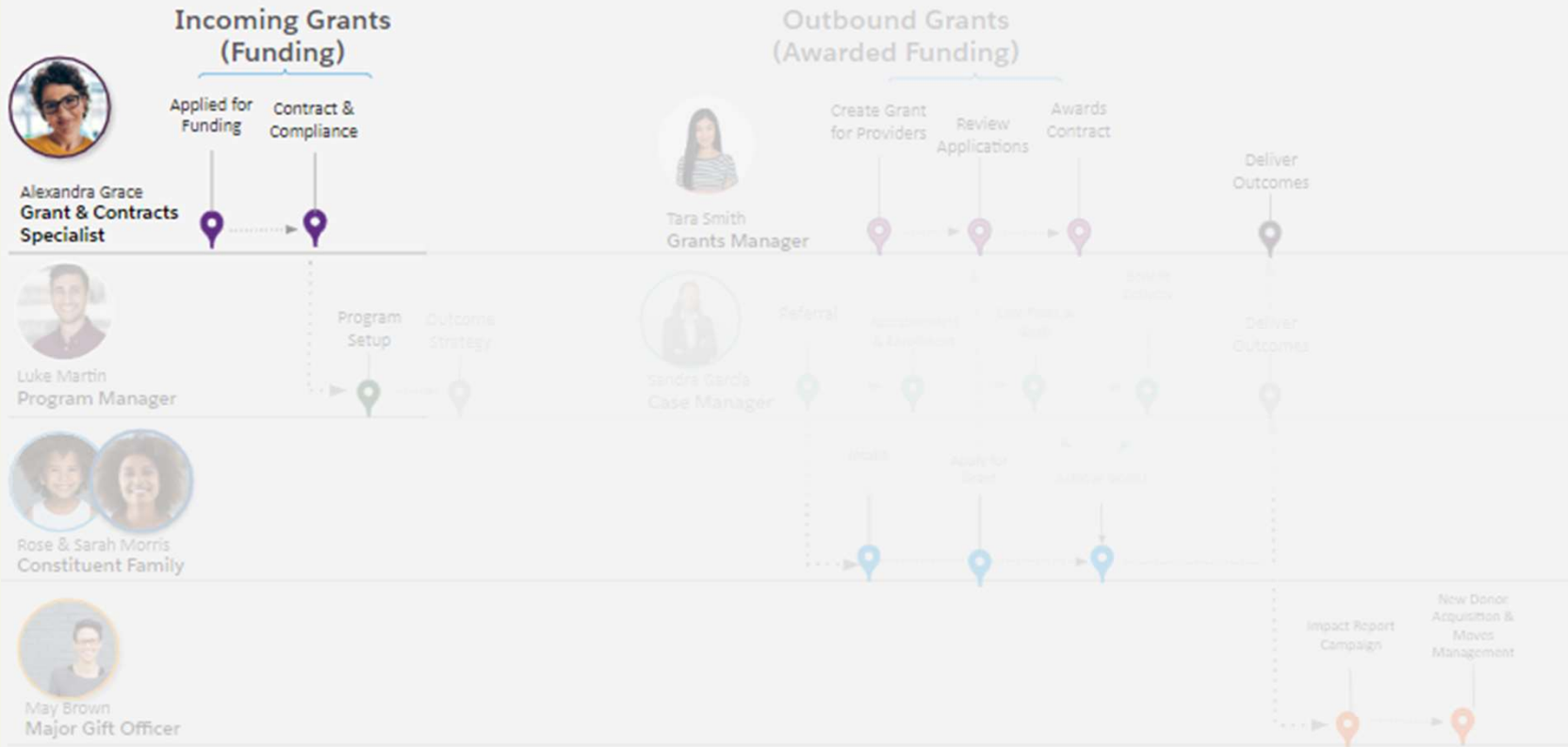
Never Outgrow Your System



A Connected Journey



A Connected Journey



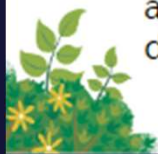
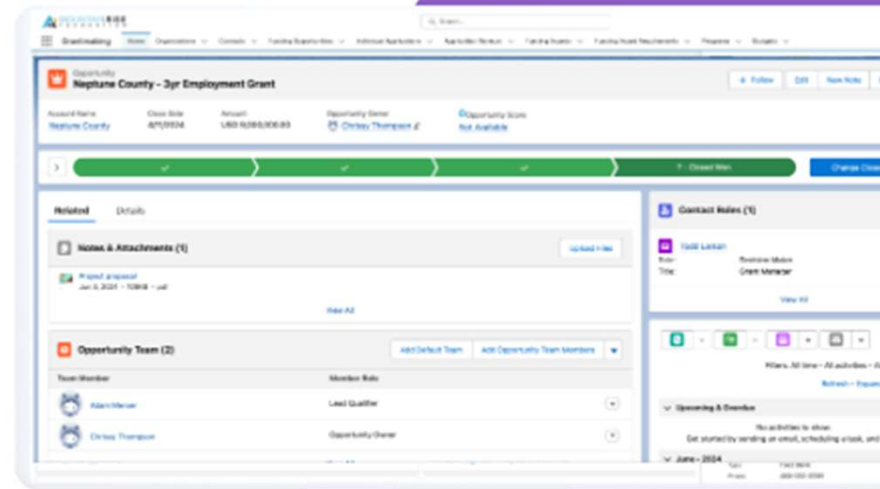


Grant & Contract Specialist

Research and Identification of Funding Opportunities: Continuously identify and research potential funding sources to match the organization's program needs and goals.

Proposal Development and Writing: Research, write, and edit grant proposals to align with funding requirements and objectives.

Compliance and Reporting: Ensure compliance with grant requirements, manage awarded funds, and submit necessary reports and documentation to funders.



Grants Record



neptune coun

Nonprofit Service E... Accounts Neptune County - 3...

Opportunity
Neptune County - 3yr Employment Grant

+ Follow Edit New Note Delete

Account Name	Close Date	Amount	Opportunity Owner	Opportunity Score
Neptune County	4/11/2024	USD 9,000,000.00	Christy Thompson	Not Available

7 - Closed Won Change Closed Stage

Related Details

Notes & Attachments (1) Upload Files

Project proposal
Jun 3, 2024 - 108KB - pdf

View All

Opportunity Team (2) Add Default Team

Team Member	Member Role
Adem Mercer	Lead Qualifier
Christy Thompson	Opportunity Owner

View All

Contact Roles (1)

Todd Larson

Role: Decision Maker
Title: Grant Manager

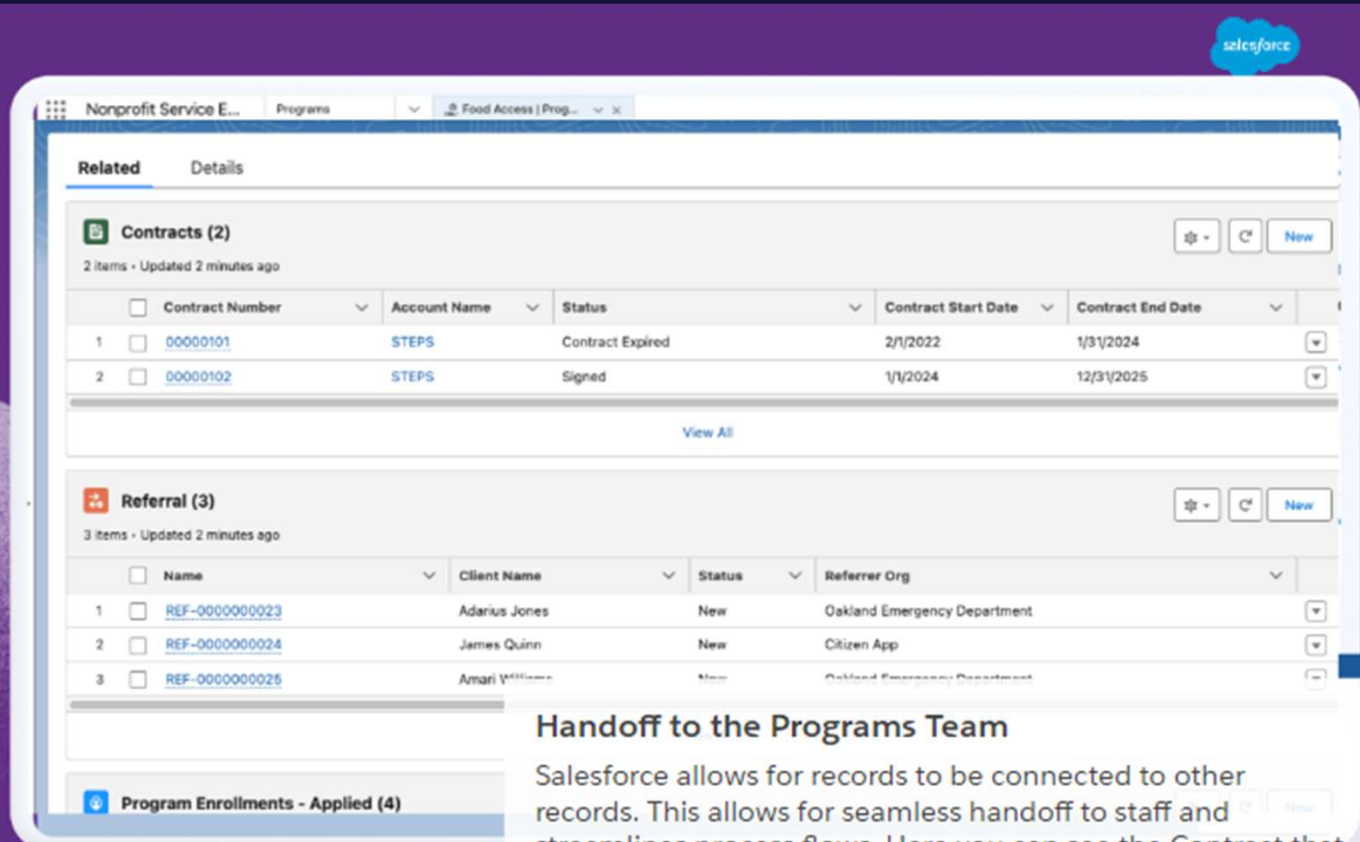
View All

Managing the Program

Organizations can create records to track funding sources, amounts, and allocations. Salesforce's flexible architecture allows for customization to fit specific needs, such as tracking grant cycles, budgets, or donations.



Contracts



The screenshot shows a Salesforce interface for a 'Nonprofit Service E...' account. The 'Related' tab is active, displaying two lists: 'Contracts (2)' and 'Referral (3)'. The 'Contracts' list has columns for Contract Number, Account Name, Status, Contract Start Date, and Contract End Date. The 'Referral' list has columns for Name, Client Name, Status, and Referrer Org.

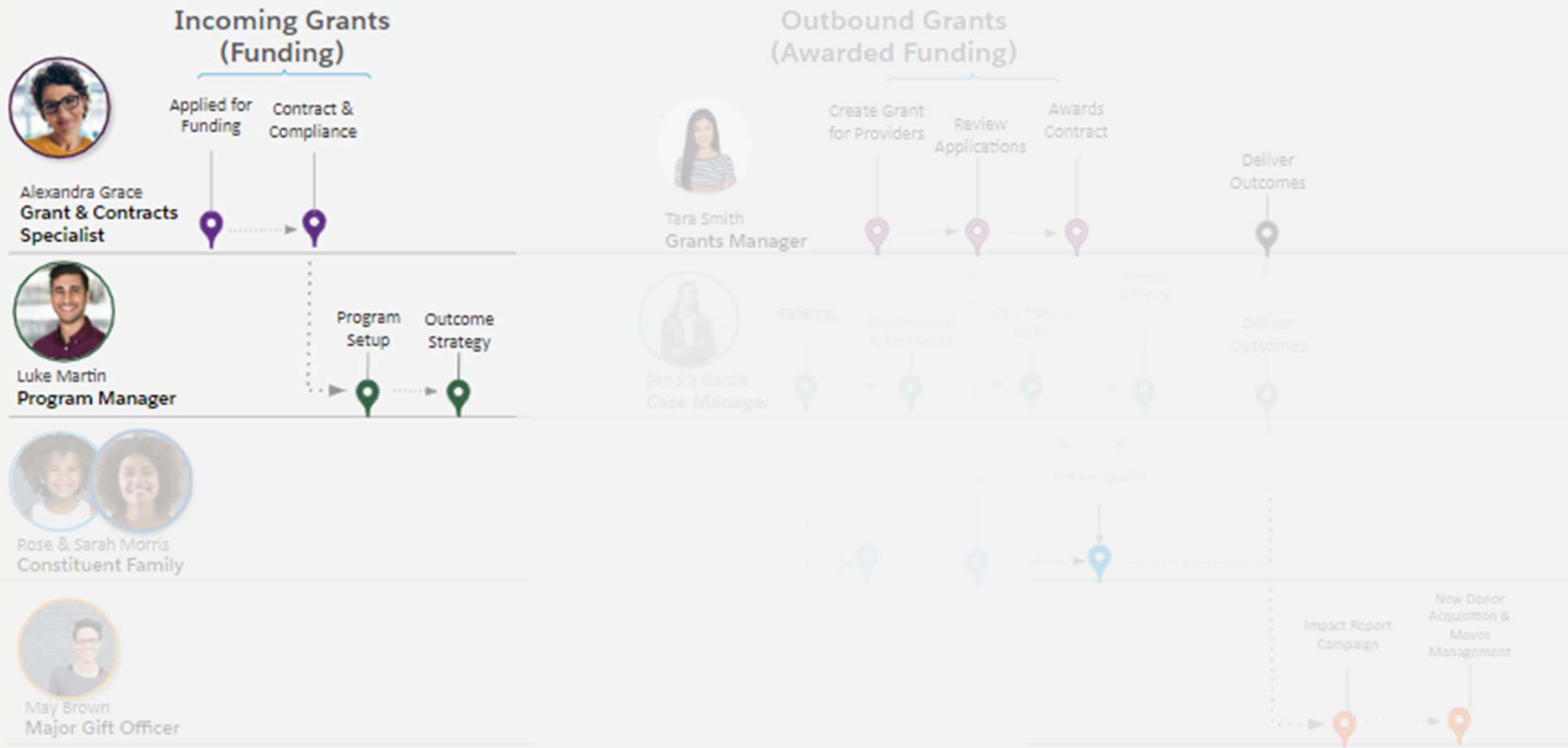
Contracts (2)					
	Contract Number	Account Name	Status	Contract Start Date	Contract End Date
1	00000101	STEPS	Contract Expired	2/1/2022	1/31/2024
2	00000102	STEPS	Signed	1/1/2024	12/31/2025

Referral (3)				
	Name	Client Name	Status	Referrer Org
1	REF-0000000023	Adarius Jones	New	Oakland Emergency Department
2	REF-0000000024	James Quinn	New	Citizen App
3	REF-0000000025	Amarj V...	New	Oakland Emergency Department

Handoff to the Programs Team

Salesforce allows for records to be connected to other records. This allows for seamless handoff to staff and streamlines process flows. Here you can see the Contract that are associated to the Program. The Program staff have easy access to requirements.

A Connected Journey





Program Manager

Align Outcomes to Programs:

Validate that the program includes clear outcome adjectives along with associated inputs/outputs

Monitoring and Evaluation:

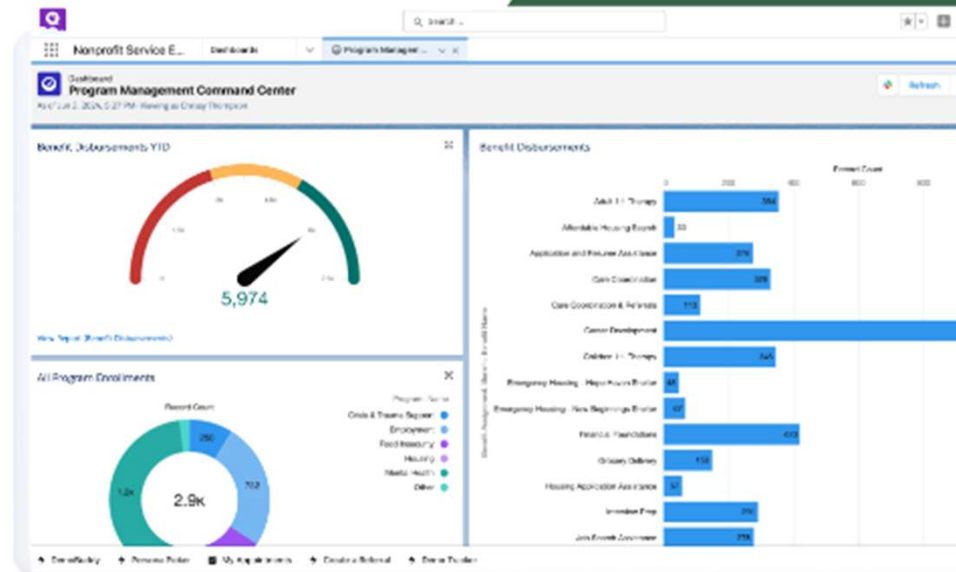
Track project progress and performance using appropriate tools and techniques.

Stakeholder Communication:

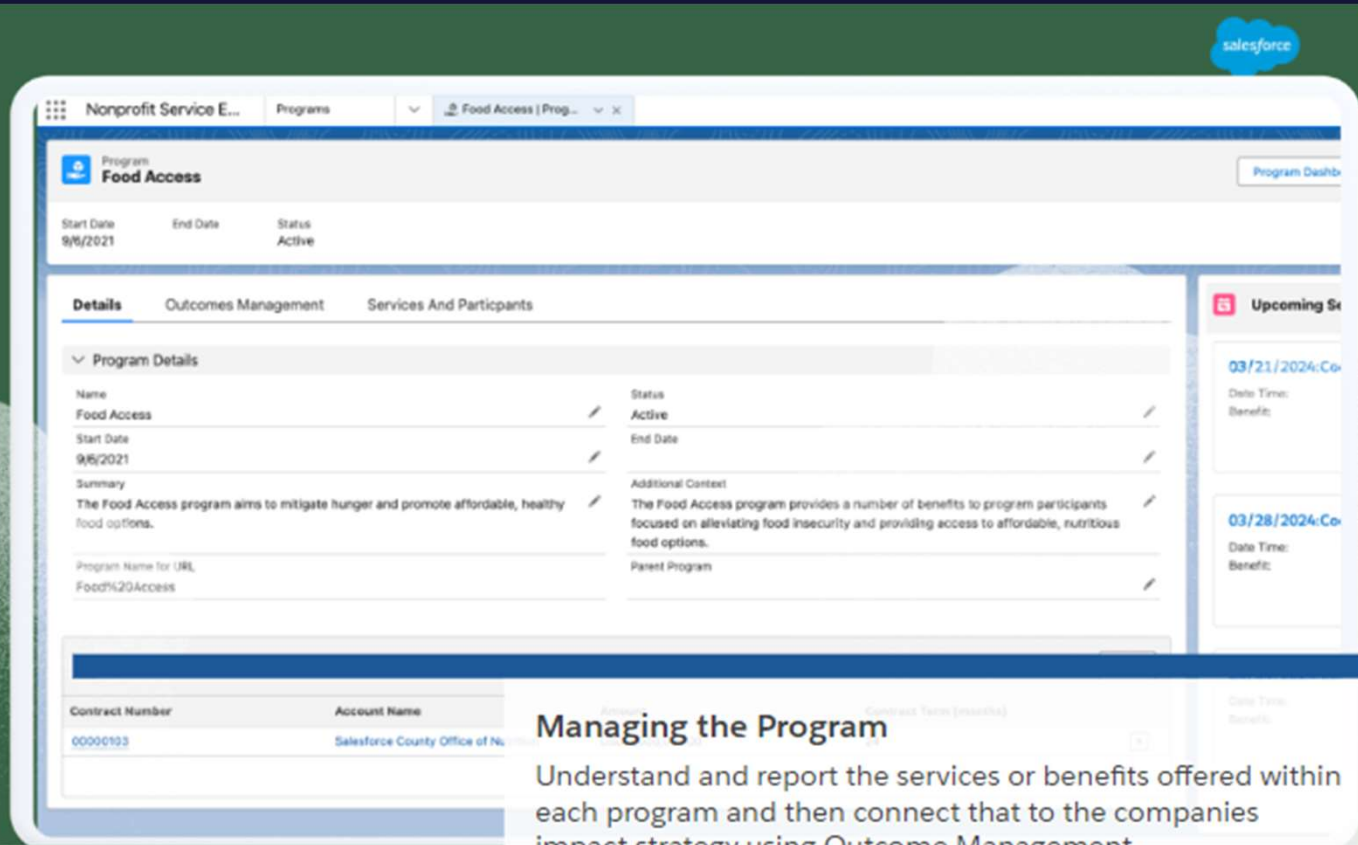
Maintain clear and consistent communication with all stakeholders.

Stakeholder Reporting:

Prepare and deliver project reports and updates to stakeholders, ensuring transparency and accountability.




Program Record



The screenshot shows a Salesforce interface for a program record. The top navigation bar includes 'Nonprofit Service E...', 'Programs', and 'Food Access | Prog...'. The main header identifies the record as 'Program: Food Access' with a 'Program Dashb...' button. Below the header, a table shows 'Start Date' as 9/6/2021, 'End Date' as blank, and 'Status' as Active. The main content area has three tabs: 'Details', 'Outcomes Management', and 'Services And Participants'. The 'Details' tab is active, showing a 'Program Details' section with fields for Name (Food Access), Start Date (9/6/2021), Summary (The Food Access program aims to mitigate hunger and promote affordable, healthy food options), Program Name for URL (Food%20Access), Status (Active), End Date, Additional Context (The Food Access program provides a number of benefits to program participants focused on alleviating food insecurity and providing access to affordable, nutritious food options), and Parent Program. To the right, an 'Upcoming St...' section lists dates: 03/21/2024: Co- and 03/28/2024: Co-. Below the details, a table lists 'Contract Number' (00000103) and 'Account Name' (Salesforce County Office of N...).

Managing the Program

Understand and report the services or benefits offered within each program and then connect that to the companies impact strategy using Outcome Management.

 **Food Insecurity**

▼ 📌 **Benefits with Sch...** 1 New

Nutritious Cooking Classes 👤

Benefit Name Nutritious Cooking Classes

Name Sessions

▼ 📅 **Benefit Schedules** 3

Monday Night 👤

6 Week - Tuesday Series 👤

Monday Cooking Class 👤

▼ 📅 **Upcoming Sessions** 6

04/30/2024: 6 Week - Tuesday Se...

Name 04/30/2024: 6 Week - Tues...

Start Date Time 4/30/2024, 3:00 PM

End Date Time 4/30/2024, 5:00 PM

▼ 📅 **Completed Sessi...** 0

▼ 📌 **Benefits** 4

Public Benefit Application

Benefit Name Public Benefit Application

Benefit Type Na... Application Assistance

Nutritional 1:1 Coaching

Benefit Name Nutritional 1:1 Coaching

Benefit Type Na... Personalized Coaching Time

Grocery Delivery

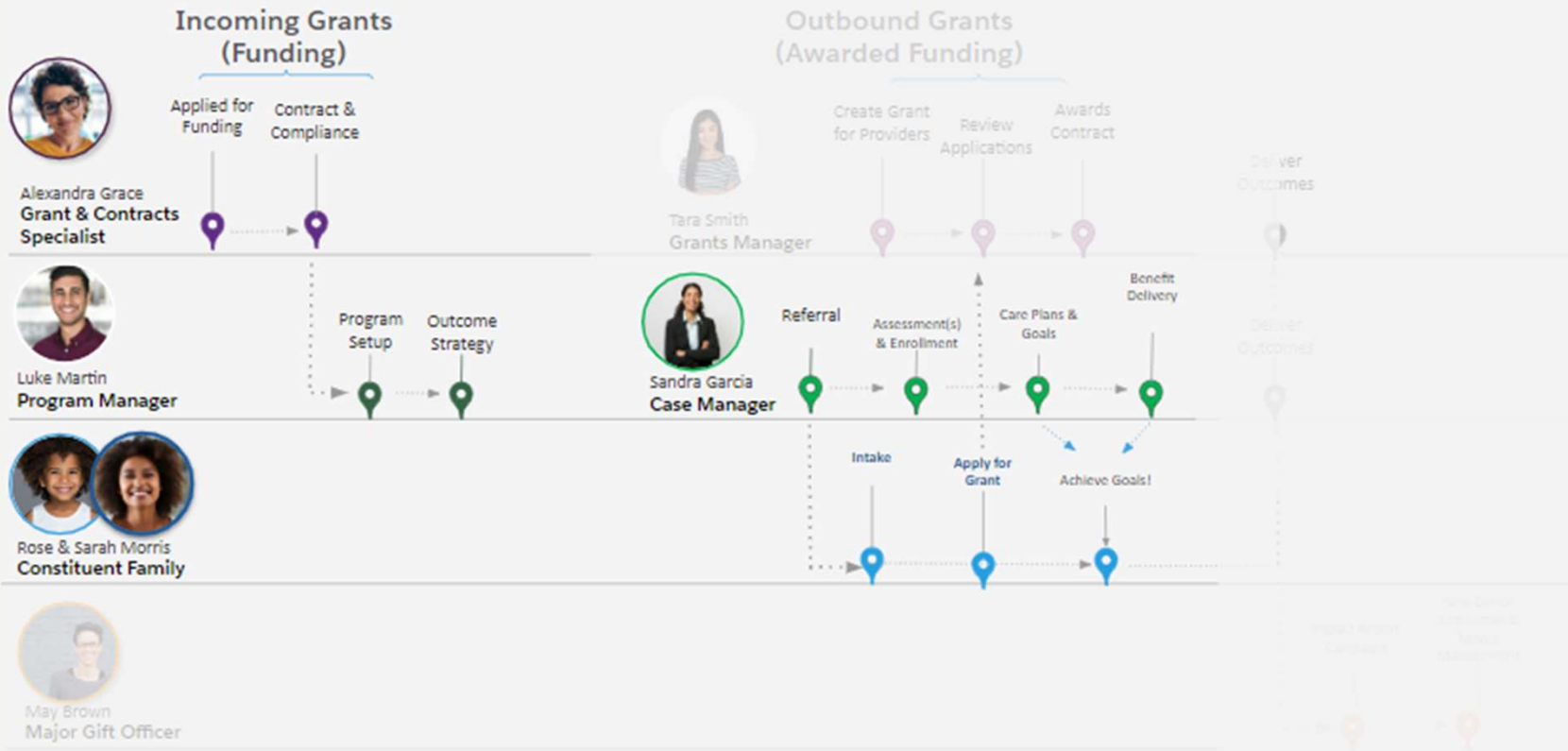
Benefit Name Grocery Delivery

Benefit Type Na... Food Distribution

[Show more >](#)



A Connected Journey





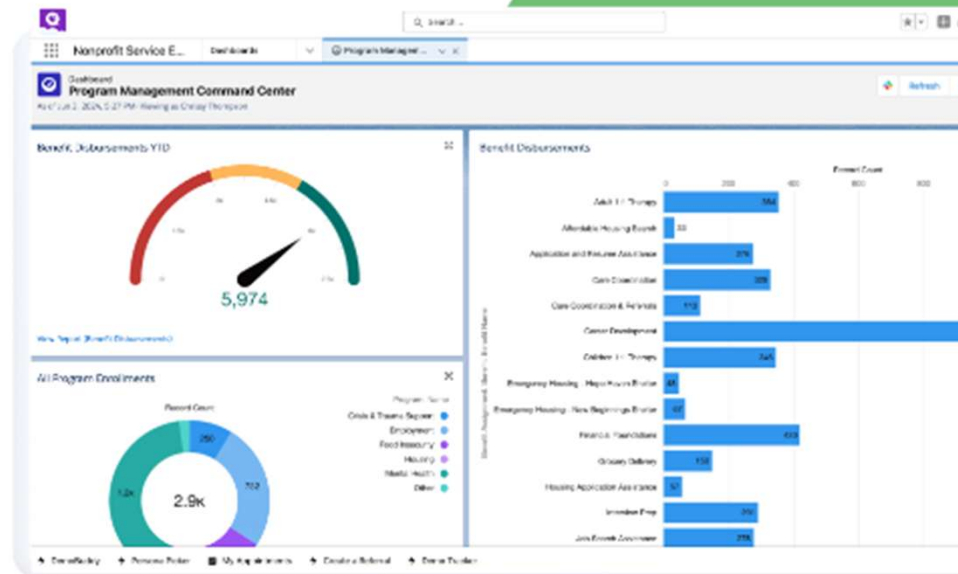
Case Manager

Client Advocacy and Support:
Advocate for clients' needs and provide necessary support services to improve their well-being.

Resource Coordination:
Connect clients with appropriate resources and services to address their specific needs.

Care Management:
Identifying clear goals and arm surround with Benefits and Services based on eligibility and needs.

Progress Monitoring:
Regularly monitor and evaluate clients' progress to ensure effective service delivery and goal achievement.




Referrals

salesforce

Q Branch Q Home Demo Wizard Demo Tools Demo C

Actionable Lists
All Actionable Lists ▼

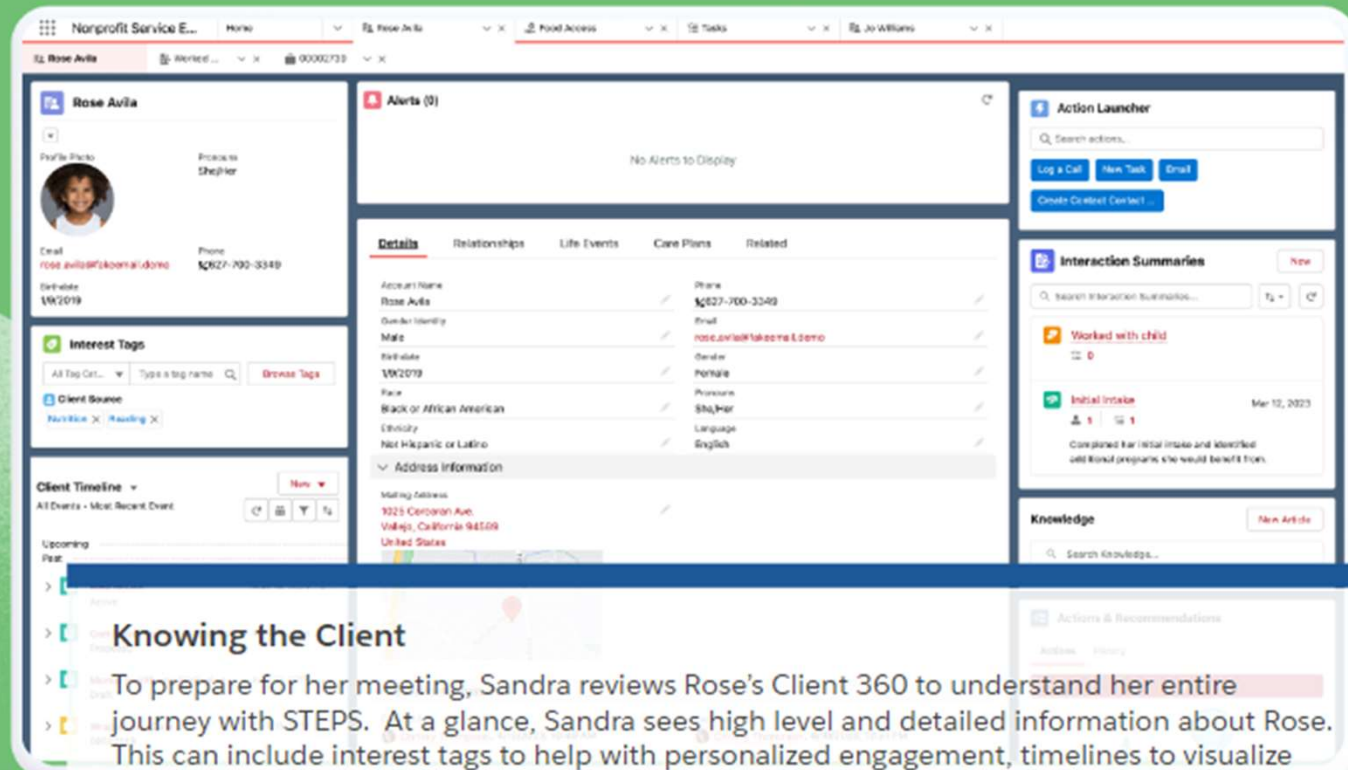
2 items • Sorted by Name • Filtered by All actionable list four ago

<input type="checkbox"/>	Name ↑	
1 <input type="checkbox"/>	High Risk Referrals	 Rose & Sarah Morris Constituent Family ACCOUNT
2 <input type="checkbox"/>	My Referrals Assigned to Me	Account

Filtered Lists

To prepare for her day, Sandra can leverage dynamic list that are built based on sorting logic. This helps to ensure those who are the most at risk have immediate outreach.

Client 360



Client 360

Profile Card: Rose Avila, Process Shepherd, Email: rose.avila@kernalidemo.com, Phone: 1-827-700-3349, Birthdate: 1/9/2019.

Interest Tags: Client Source: Nutrition, Reading.

Client Timeline: All Events - Most Recent Event. Upcoming: None.

Details:

Field	Value
Account Name	Rose Avila
Gender	Male
Race	Black or African American
Ethnicity	Not Hispanic or Latino
Address Information	Mailing Address: 3023 Carson Ave, Valpa, California 94509, United States
Phone	1-827-700-3349
Email	rose.avila@kernalidemo.com
Gender	Male
Race	Black or African American
Process	Shepherd
Language	English

Alerts (0): No Alerts to Display.

Action Launcher: Search actions... Log a Call, New Task, Email, Create Contact.

Interaction Summaries: Search interaction summaries... Worked with child, Initial Intake (Mar 10, 2023).

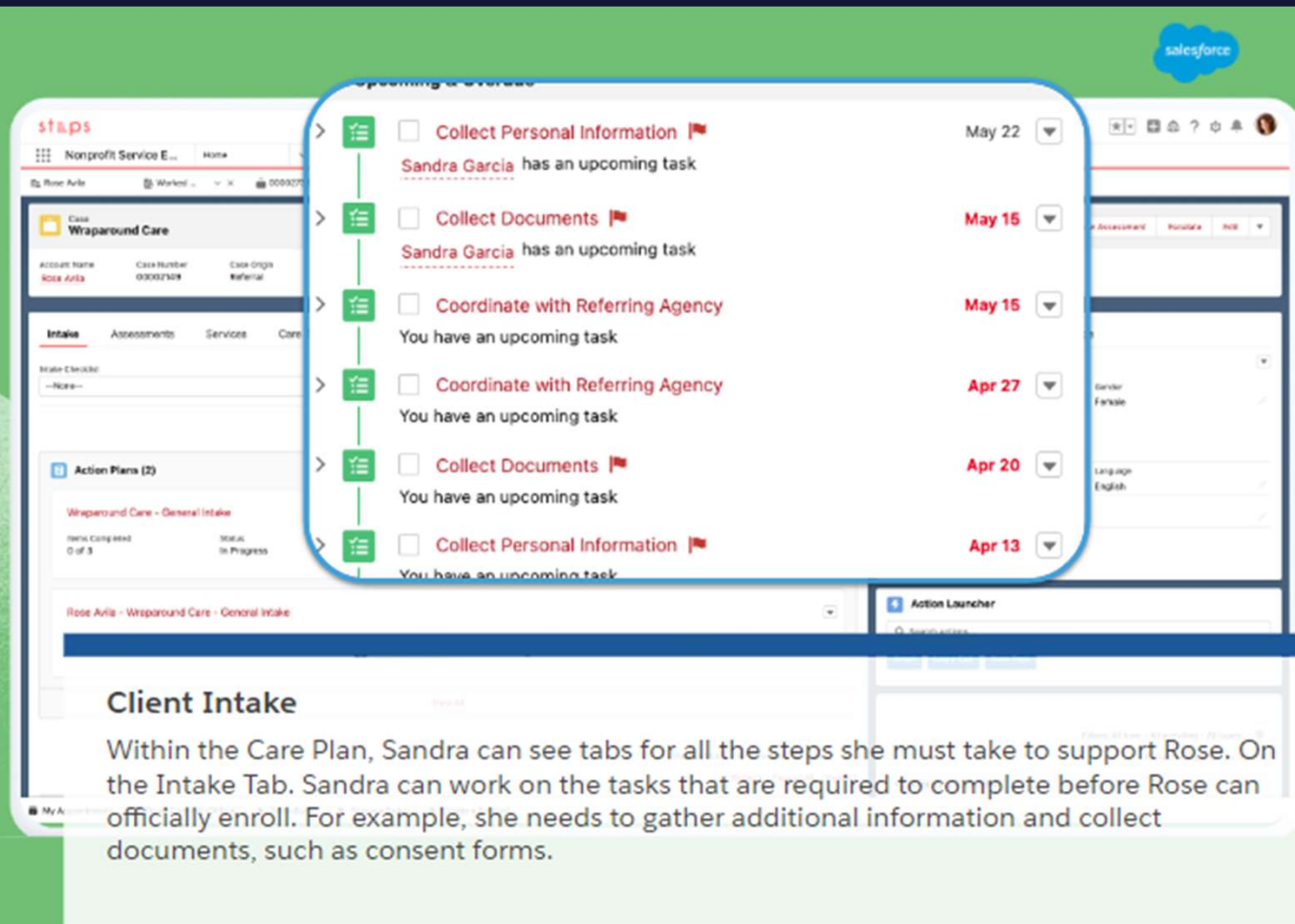
Knowledge: Search knowledge... New Article.

Actions & Recommendations: Add new, History.

Knowing the Client

To prepare for her meeting, Sandra reviews Rose's Client 360 to understand her entire journey with STEPS. At a glance, Sandra sees high level and detailed information about Rose. This can include interest tags to help with personalized engagement, timelines to visualize and track the events that affect her outcomes, and quick snapshots of all her interactions with STEPS staff.

Case Manager Intake



The screenshot displays the 'staps' Case Manager Intake interface. A central pop-up window lists tasks for Sandra Garcia:

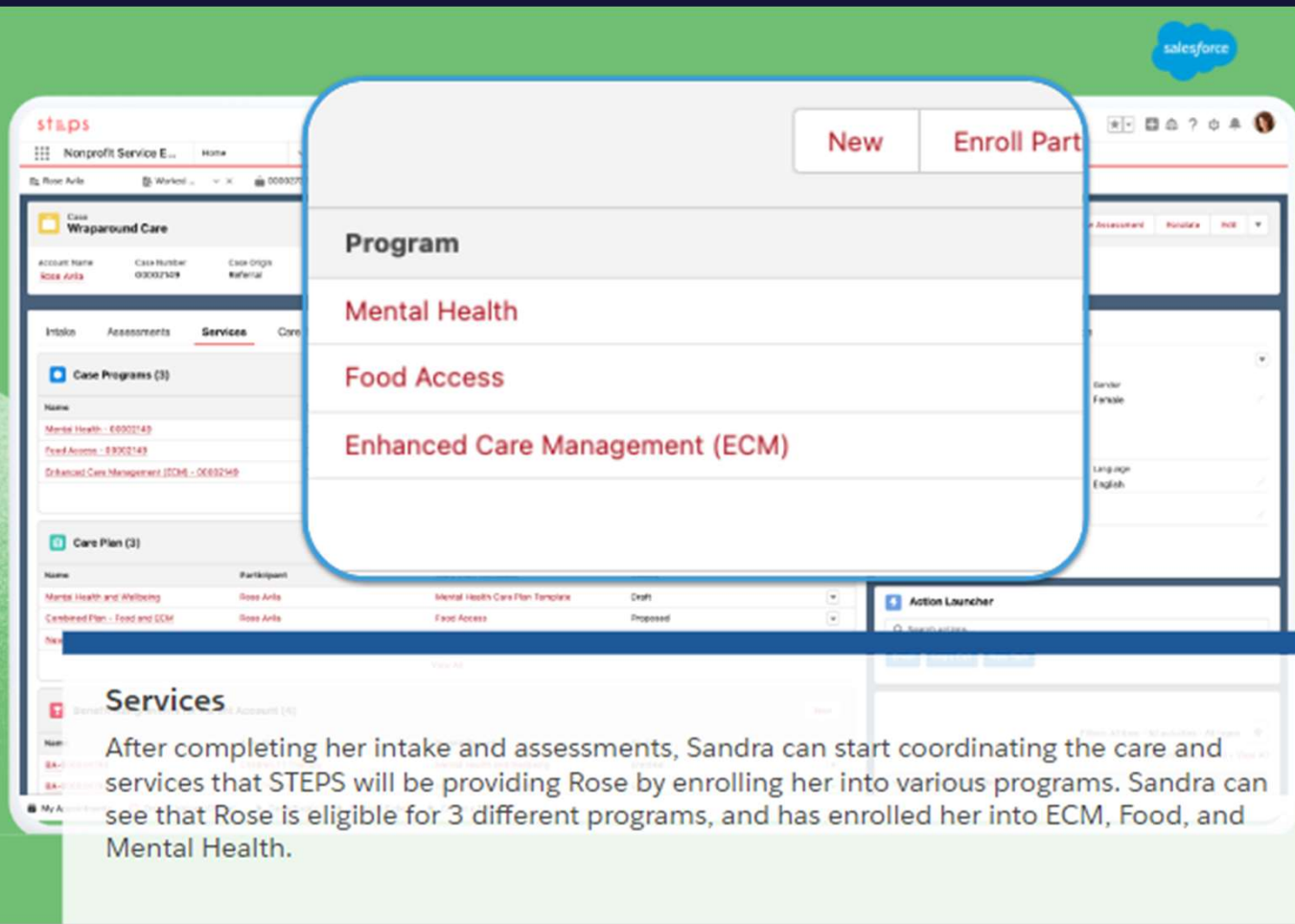
- Collect Personal Information (May 22)
- Collect Documents (May 15)
- Coordinate with Referring Agency (May 15)
- Coordinate with Referring Agency (Apr 27)
- Collect Documents (Apr 20)
- Collect Personal Information (Apr 13)

The background interface shows the 'Client Intake' section for a case named 'Wraparound Care' for 'Rose Arlia'. It includes tabs for 'Intake', 'Assessments', 'Services', and 'Care'. The 'Intake' tab is active, showing a 'Brain Check' section and an 'Action Plans (2)' section. The 'Action Plans' section lists 'Wraparound Care - General Intake' with a progress indicator 'Items Completed 0 of 3' and a status 'Status In Progress'. An 'Action Launcher' is visible at the bottom right.

Client Intake

Within the Care Plan, Sandra can see tabs for all the steps she must take to support Rose. On the Intake Tab. Sandra can work on the tasks that are required to complete before Rose can officially enroll. For example, she needs to gather additional information and collect documents, such as consent forms.

Case Manager Care Programs



The screenshot shows the STEPS Salesforce interface for a case titled "Wraparound Care". The interface includes a sidebar with navigation tabs for "Intake", "Assessments", "Services", and "Care". The main content area displays a list of "Case Programs (3)" and "Care Plan (3)". A blue callout box highlights the "Program" section, which lists "Mental Health", "Food Access", and "Enhanced Care Management (ECM)". Below the screenshot, a text box explains that Sandra can coordinate care by enrolling Rose into these programs.

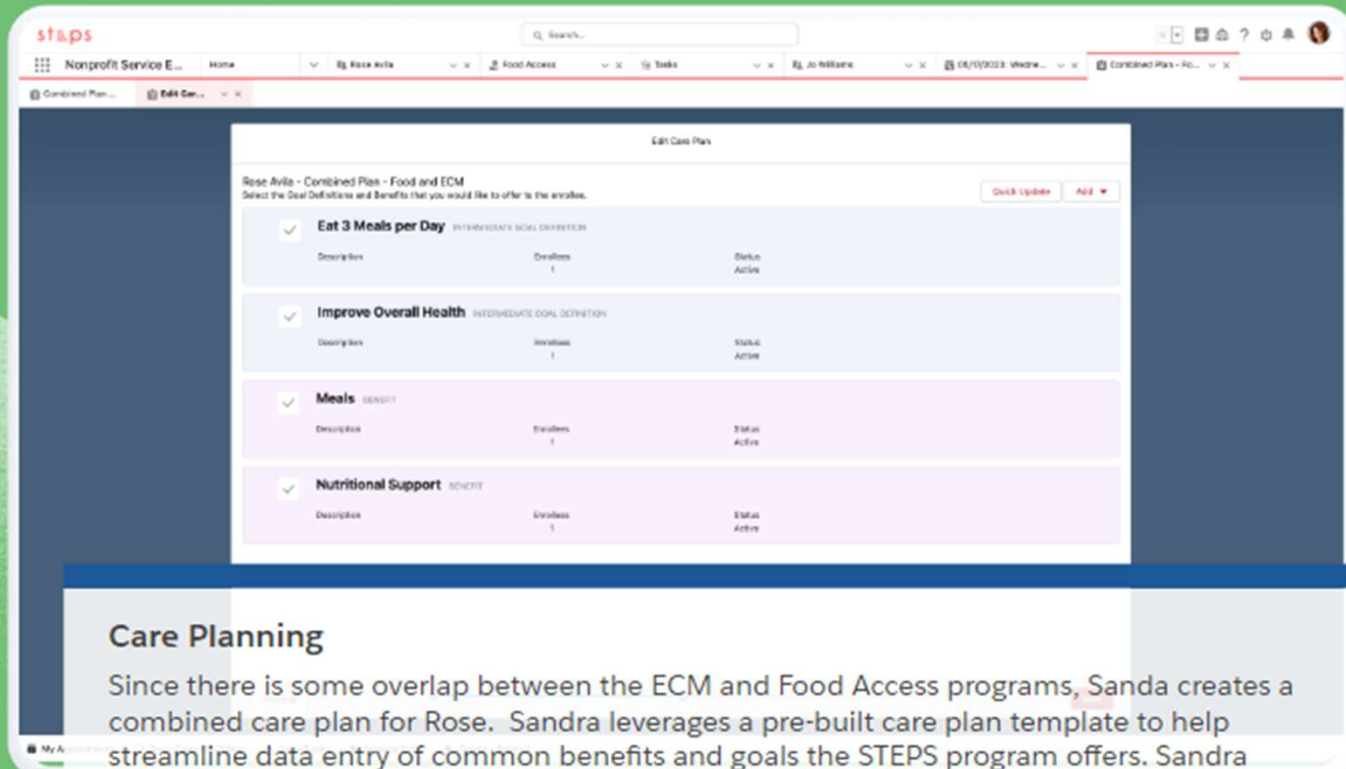
Program

- Mental Health
- Food Access
- Enhanced Care Management (ECM)

Services

After completing her intake and assessments, Sandra can start coordinating the care and services that STEPS will be providing Rose by enrolling her into various programs. Sandra can see that Rose is eligible for 3 different programs, and has enrolled her into ECM, Food, and Mental Health.

Case Manager Care Plans



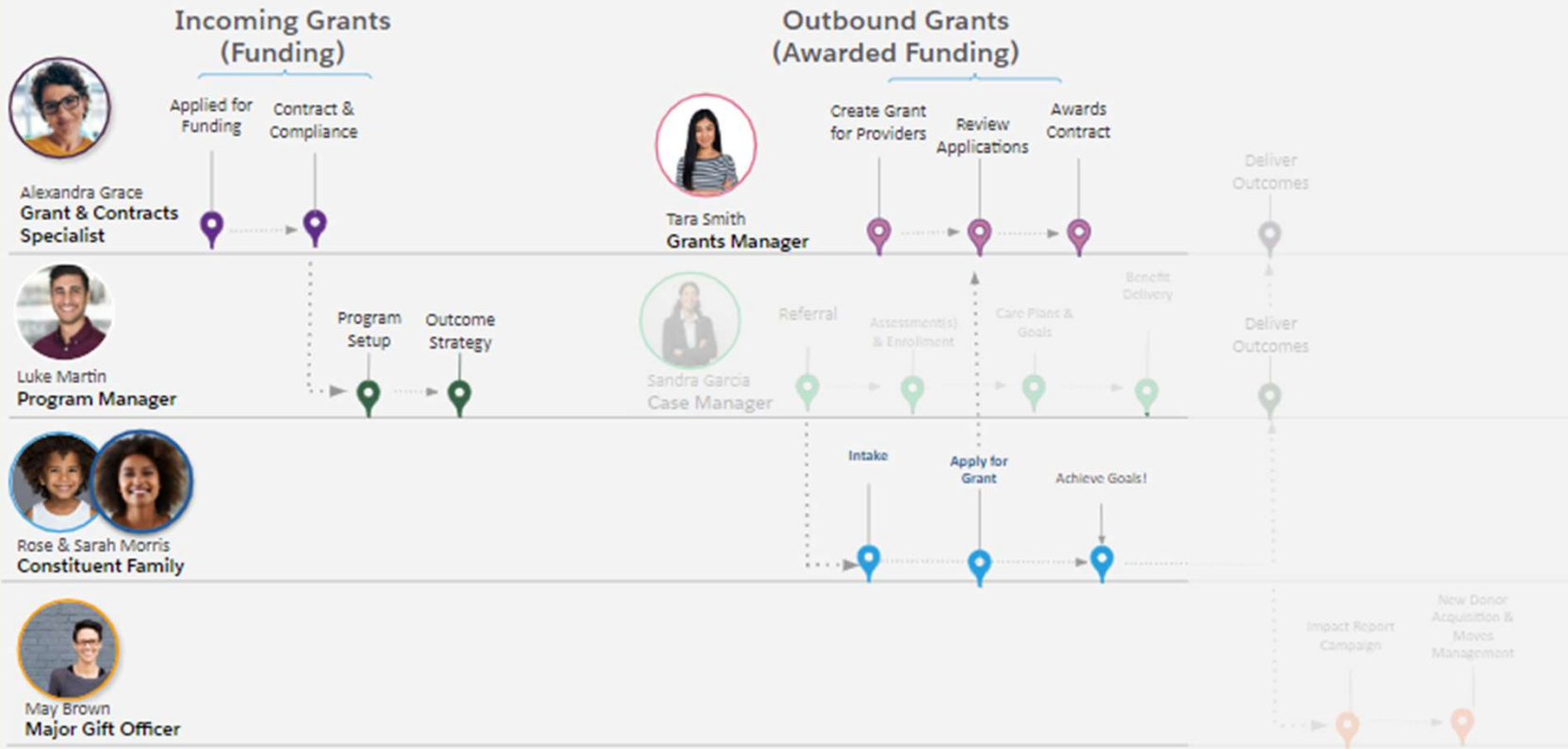
The screenshot shows the 'Edit Case Plan' interface in the STEPS application. The user is editing a 'Combined Plan' for 'Rose Avila'. The interface displays a list of pre-built goals and benefits that can be selected for the client's care plan. The selected goals are highlighted in light blue and light purple.

Goal/Benefit	Intermediate Goal Definition	Status	Action
<input checked="" type="checkbox"/> Eat 3 Meals per Day	INTERMEDIATE GOAL DEFINITION	Active	Active
<input checked="" type="checkbox"/> Improve Overall Health	INTERMEDIATE GOAL DEFINITION	Active	Active
<input checked="" type="checkbox"/> Meals	benefit	Active	Active
<input checked="" type="checkbox"/> Nutritional Support	benefit	Active	Active

Care Planning

Since there is some overlap between the ECM and Food Access programs, Sandra creates a combined care plan for Rose. Sandra leverages a pre-built care plan template to help streamline data entry of common benefits and goals the STEPS program offers. Sandra appreciates that she doesn't need to type out the same goals for every client, she just selects the ones she needs.

A Connected Journey



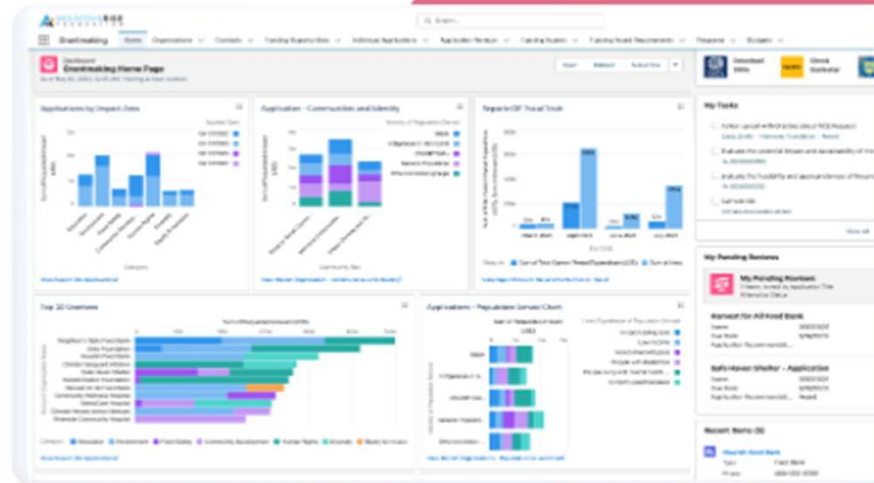


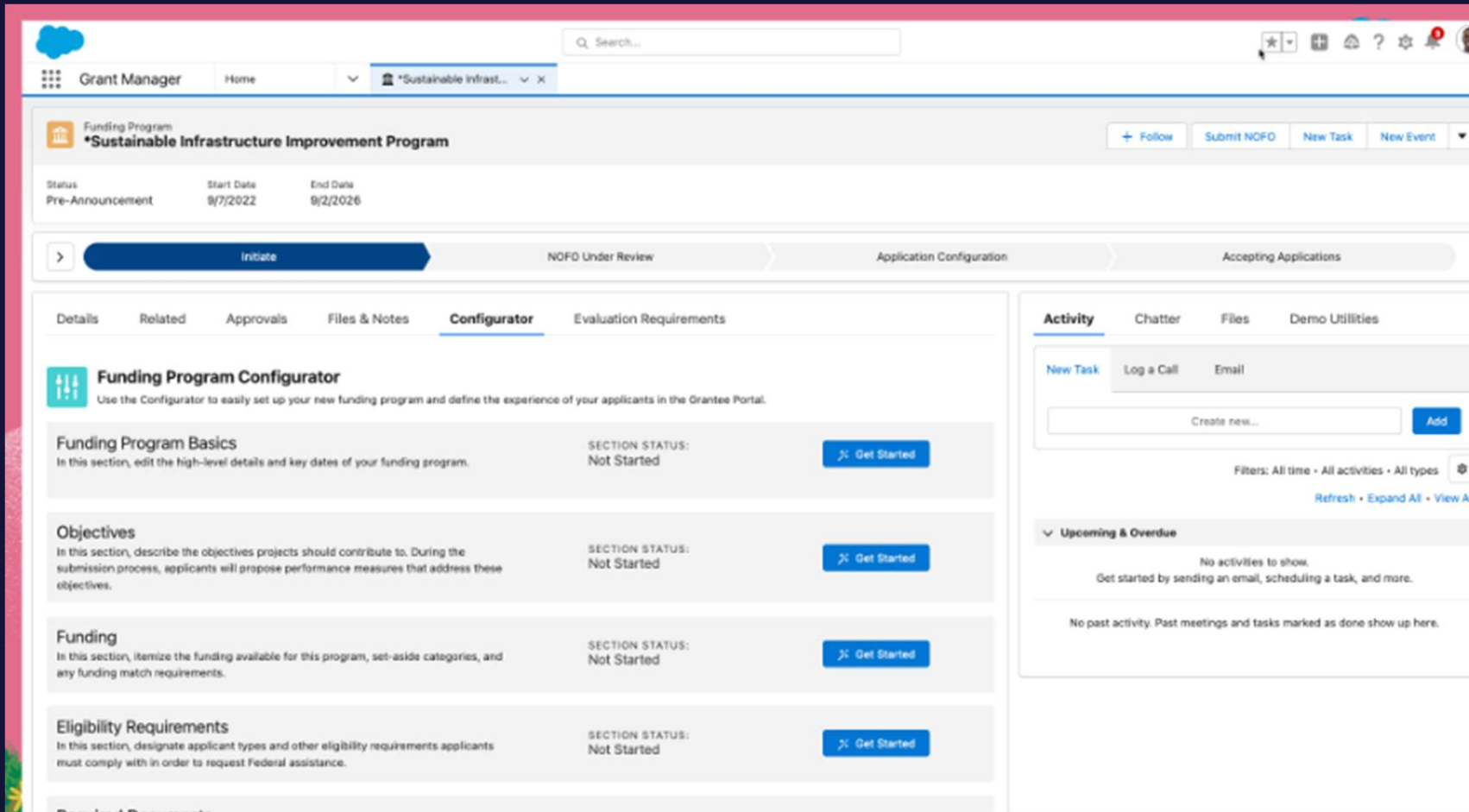
Grants Management

Adhere to Program Requirements:
Connect programs and grants to understand how they're driving the mission forward

Relationship Management
Manage all relationships with not just applicants and grantees, but also portfolio managers, reviewers, collaborators, and other stakeholders

Awarding and Granting
Understand financial commitments and where everything stands with each program





The screenshot displays the Grant Manager interface for the Sustainable Infrastructure Improvement Program. The top navigation bar includes a search field and utility icons. The main header shows the program name and key dates: Status (Pre-Announcement), Start Date (9/7/2022), and End Date (9/2/2026). A progress bar indicates the current stage is 'Initiate', followed by 'NOFO Under Review', 'Application Configuration', and 'Accepting Applications'. The 'Configurator' tab is active, showing four sections: 'Funding Program Basics', 'Objectives', 'Funding', and 'Eligibility Requirements', each with a 'Get Started' button. The 'Activity' sidebar on the right offers options like 'New Task', 'Log a Call', and 'Email', along with filters and an 'Upcoming & Overdue' section.

Grant Manager | Home | *Sustainable Infrast... | Search...

Funding Program
***Sustainable Infrastructure Improvement Program**

Status: Pre-Announcement | Start Date: 9/7/2022 | End Date: 9/2/2026

Initiate | NOFO Under Review | Application Configuration | Accepting Applications

Details | Related | Approvals | Files & Notes | **Configurator** | Evaluation Requirements

Funding Program Configurator

Use the Configurator to easily set up your new funding program and define the experience of your applicants in the Grantee Portal.

Section	Description	Section Status	Action
Funding Program Basics	In this section, edit the high-level details and key dates of your funding program.	Not Started	Get Started
Objectives	In this section, describe the objectives projects should contribute to. During the submission process, applicants will propose performance measures that address these objectives.	Not Started	Get Started
Funding	In this section, itemize the funding available for this program, set-aside categories, and any funding match requirements.	Not Started	Get Started
Eligibility Requirements	In this section, designate applicant types and other eligibility requirements applicants must comply with in order to request Federal assistance.	Not Started	Get Started

Activity | Chatter | Files | Demo Utilities

New Task | Log a Call | Email

Create new... | Add

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Grantee Portal

Grantees can access funding opportunities, applications, and get in touch with staff in a single place

Pre-configured for essential processes, a template kickstarts grantee engagement, accelerates implementation and time to value

Impact reporting made easy for the grantmaker and grantees





Application Status
Draft - Not Submitted

Requested Amount
\$0.00

Applying Organization
Virginia Department to Infrastructure

Main Point of Contact
Jonathan Leader

Application Workspace Details Related

Resource Center



Complete Your Application

This is your workspace for preparing your applicant. Complete each section in order to submit a compliant request.

Applicant Information

In this section, verify that SAM data about you and your organization is accurate and current.

SECTION STATUS:
Not Started

[Get Started](#)

Project Information

In this section, provide high-level details about your related project.

SECTION STATUS:
Not Started

[Get Started](#)

Project Funding

In this section, outline your funding request, income sources, how you contribute to set-aside category targets, and disclose any Federal debt delinquency.

SECTION STATUS:
Not Started

[Get Started](#)

Project Locations

In this section, itemize all of the areas that will be impacted by your project and the requested Federal assistance.

SECTION STATUS:
Not Started

[Get Started](#)

Objectives & Performance Measures

In this section, please define the performance measures you will use to monitor your progress towards this program's objectives.

SECTION STATUS:
Not Started

[Get Started](#)

Upload Documents & Files

In this section, upload any documents and files that are required to evaluate your request.

SECTION STATUS:
Not Started

[Get Started](#)

Program You Are Applying For

Funding Program: [Sustainable Infrastructure Improvement Program \(SAMPLE\)](#)

Current Program Status: Accepting Applications

Funding Opportunity #: GOTF-000031

CFDA #: 99.43

Total Funding: \$150,000,000

Important Dates

 03/15/2022 - Public Notice of Funding Opportunity (NOFO) Posted

 03/15/2022 - Accepting Applications

 06/01/2022 - Applications Due

 08/17/2022 - Award Decisions Communicated

Need to Register or Update Your Info?

All applicants must be registered with the System for Award Management (SAM.gov). This is the official repository for any entity applying for Federal assistance.

Updates and corrections must also be made through this site to keep your organization's information current. Applicants risk automatic rejection if they knowingly apply for assistance with inaccurate or out of date information.

Analytics

Welcome, Peter Program!
Your home to manage the full grants lifecycle

[Create a New Funding Program](#)

Analytics | Funding Program Pipeline | New Funding Requests

Grant Amount by Congressional District

State: [US] | Congressional District: [US]

Grant Amount: 1,346,297 - 12,047,500

Grant Amount by Mode and Program

Mode	Program	Amount
Commerce	Affordable Housing	
	Community Studies	
	SMB Fund	
Health	Covid Response	
	Disease Prevention	
	Drug Research	

Funding Distributions

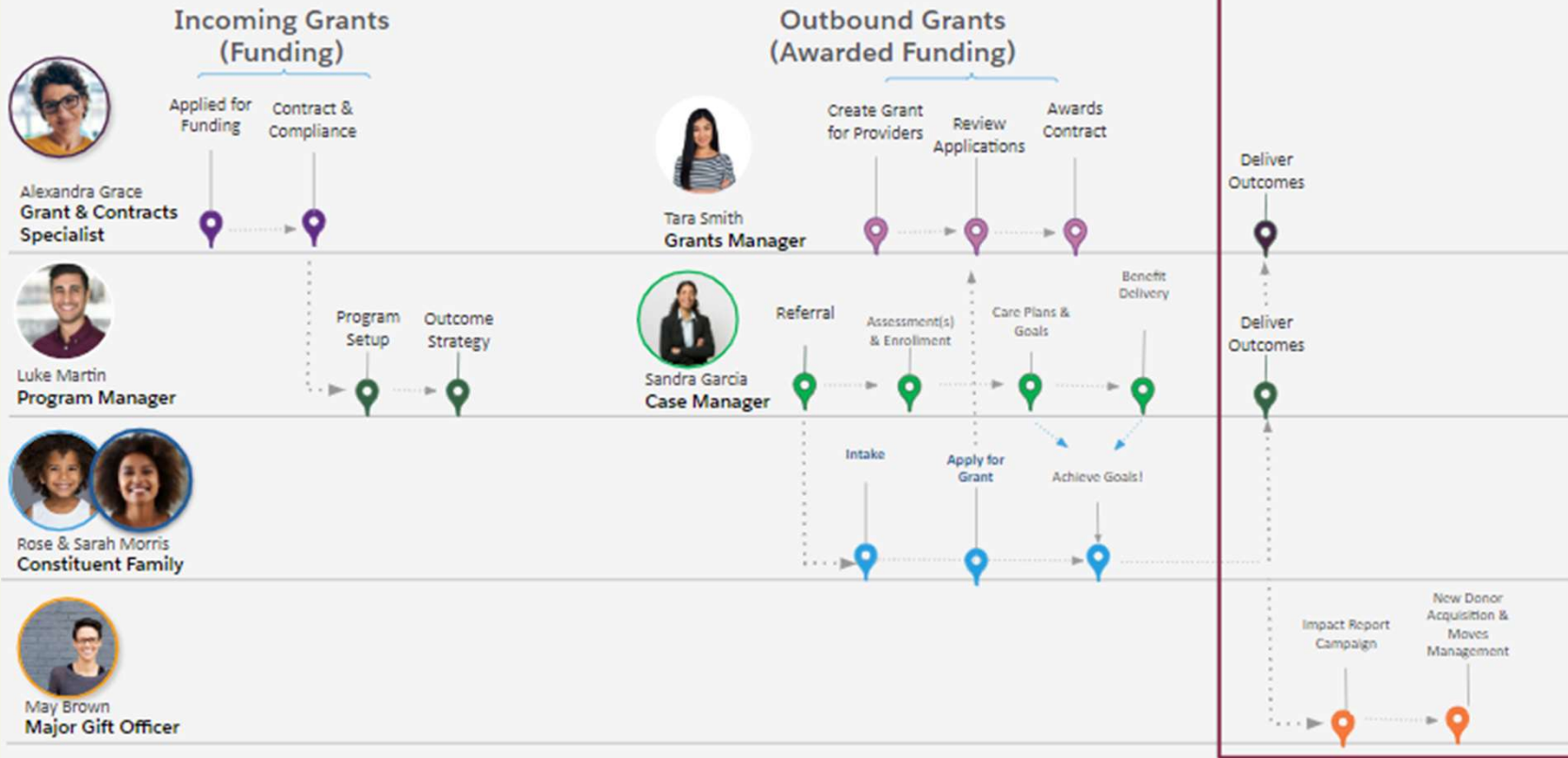
Funders can now quickly analyze grants funding distribution across congressional districts and even interact with the data by clicking into a district to learn more.

Items to Approve: No approval requests need your attention right now.

Today's Events: 2022 Applicant Review Webinar, Monthly Grant Program Meeting

Today's Tasks: Submit Data to USASPENDING.gov, Invite Application Review

A Connected Journey



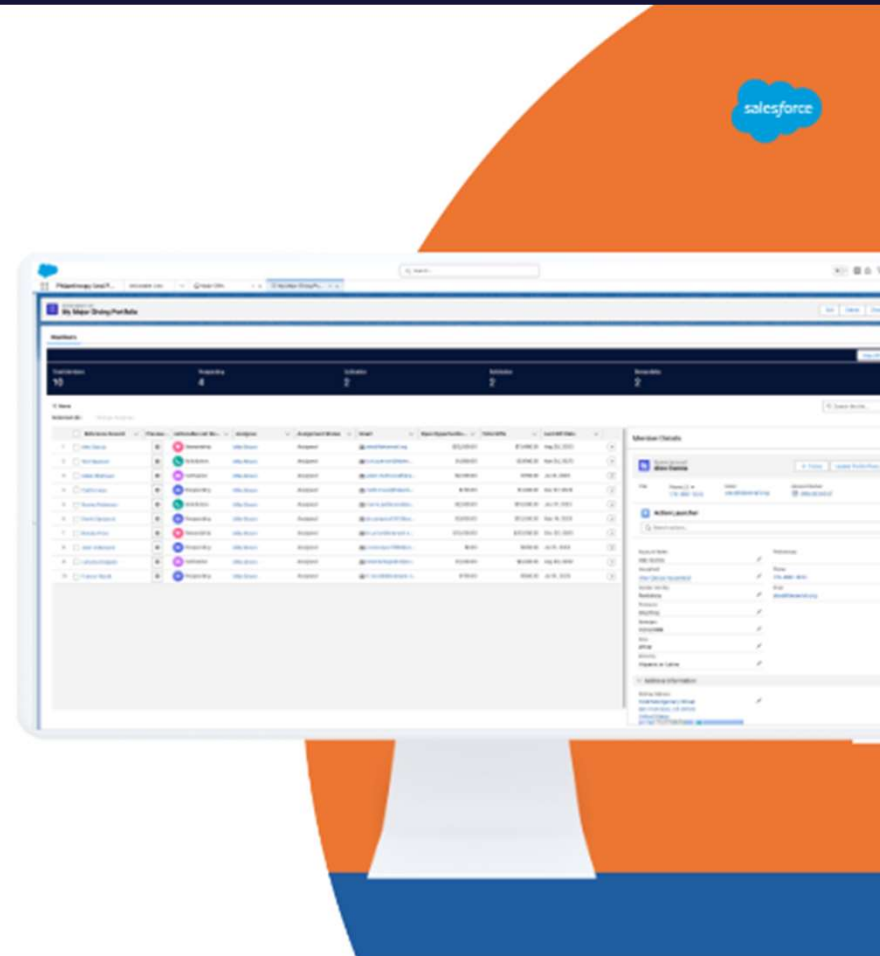


Major Gift Officer

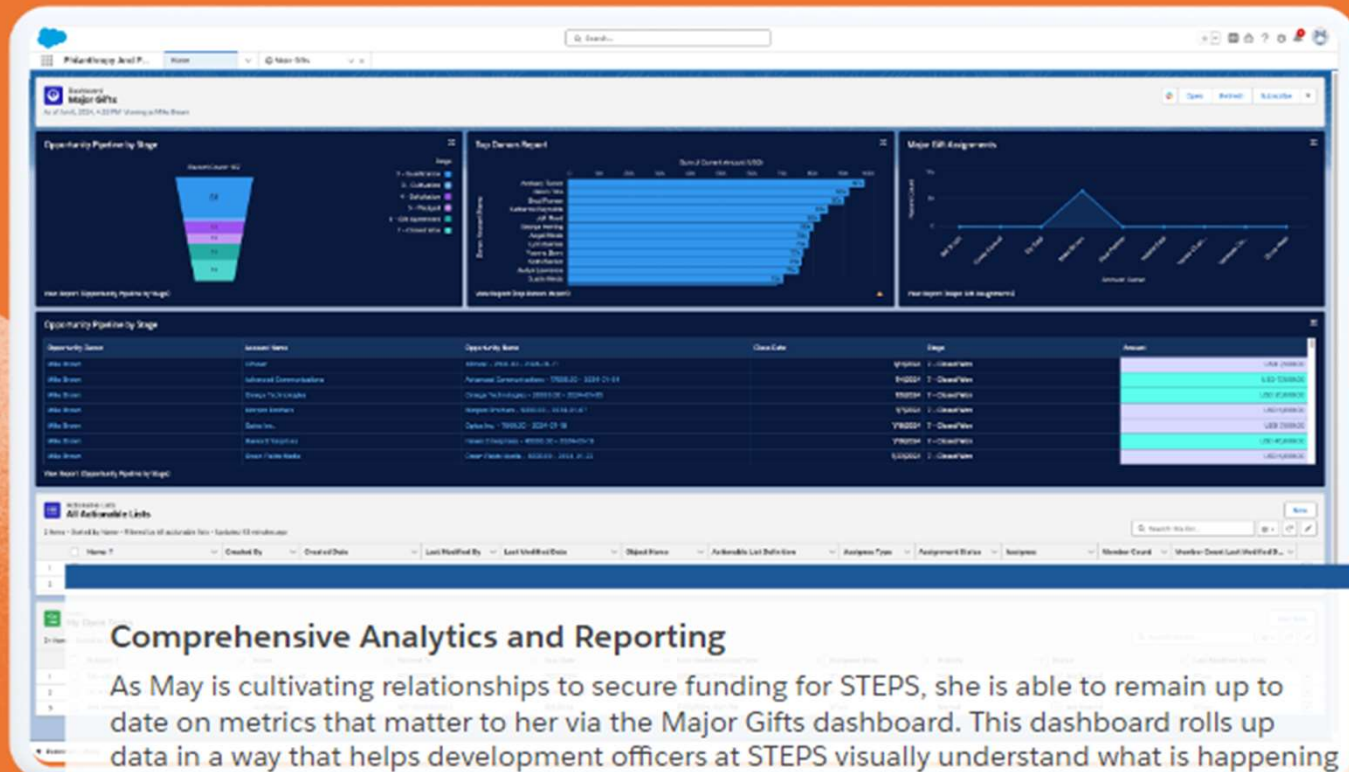
Relationship Building and Stewardship:
Cultivate and maintain strong relationships with major donors through personalized engagement and regular communication.

Fundraising Strategy Development:
Develop and implement strategies to identify, solicit, and secure significant donations to support the organization's mission.

Donor Recognition and Reporting:
Ensure major donors are appropriately recognized and informed about the impact of their contributions through tailored reports and acknowledgments.



Major Giving Analytics



Comprehensive Analytics and Reporting

As May is cultivating relationships to secure funding for STEPS, she is able to remain up to date on metrics that matter to her via the Major Gifts dashboard. This dashboard rolls up data in a way that helps development officers at STEPS visually understand what is happening across their funding opportunities and major donors.

Q

Q Search...

★
+
🗑️
?

Nonprofit Service E...
Programs
*Outreach Enrolme...
Recently Viewed | C...
Major Donor Aquisit...

Q

Campaign

Major Donor Aquisition

A

Edit
Clone

Type	Status	Start Date	End Date
Email	Completed	2/10/2023	3/12/2023

Related

Details

Q

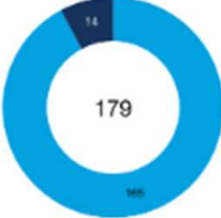
Influenced Opportunities (6+)

Opportunity Name	Revenue Share	Amount	Stage
Optos Inc. - New Business - 23K	USD 22,500.00	USD 22,500.00	Proposal/Quote
Optos Inc. - Add-On Business - 3...	USD -7,000.00	USD -7,000.00	Proposal/Quote
Employnet - New Business - 66K	USD 66,000.00	USD 66,000.00	Qualification
Aims Social, Inc. - New Business ...	USD 99,000.00	USD 99,000.00	Proposal/Quote
Vand Enterprises, Inc. - Add-On ...	USD 35,000.00	USD 35,000.00	Negotiation
UlyssesNet - Services - 100K	USD 0.00	USD 100,000.00	Qualification

[View All](#)

Campaign Members

Number of Members



179

[View All](#)

Activity

Filters: All time • All activities

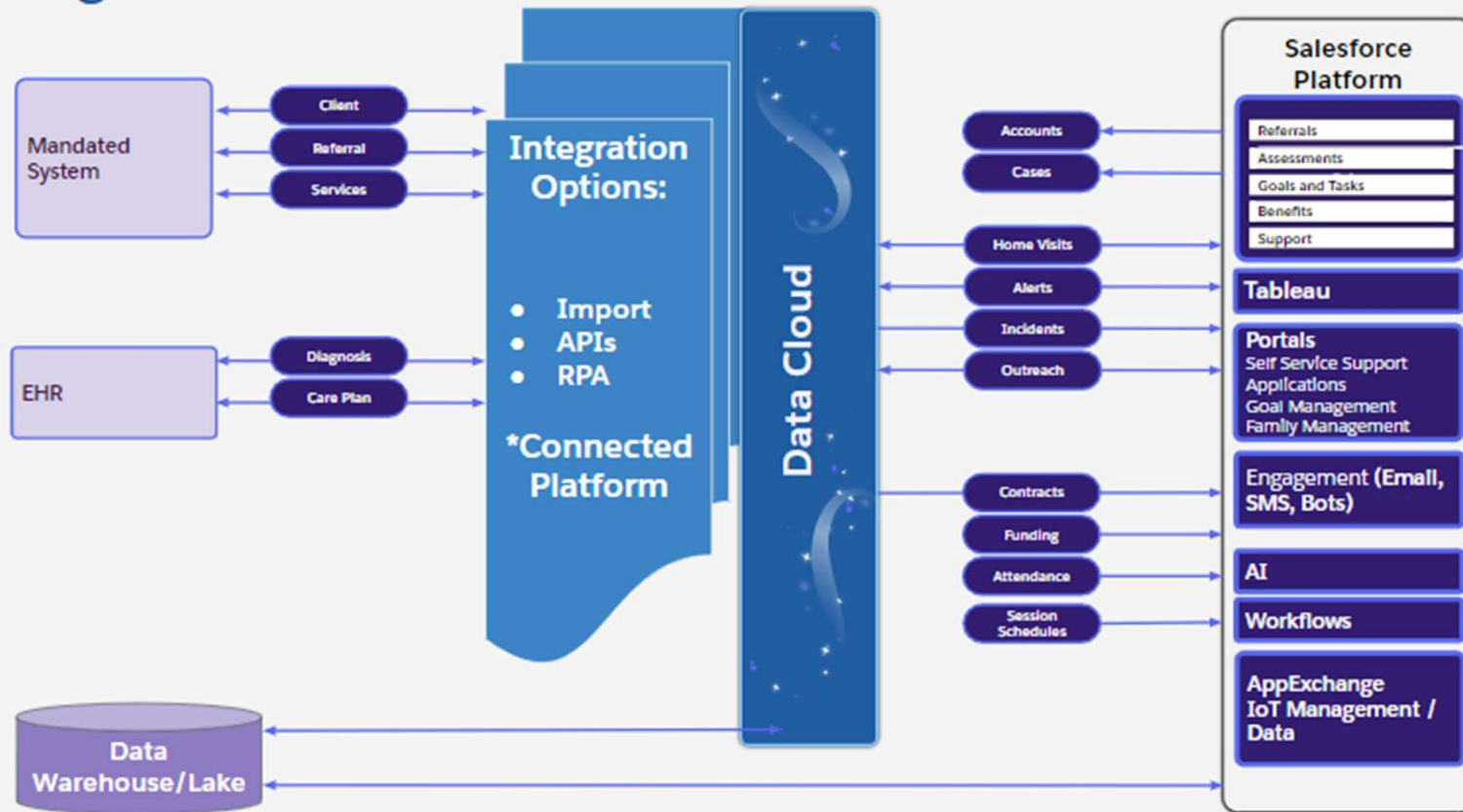
[Refresh](#) • [Ex](#)



That's great, but how do we connect all this data?



Integration



We Launched Salesforce Data Cloud

Hyperscale data platform powering the World's 1st **Real-Time** CRM



Real-Time Flow Automation

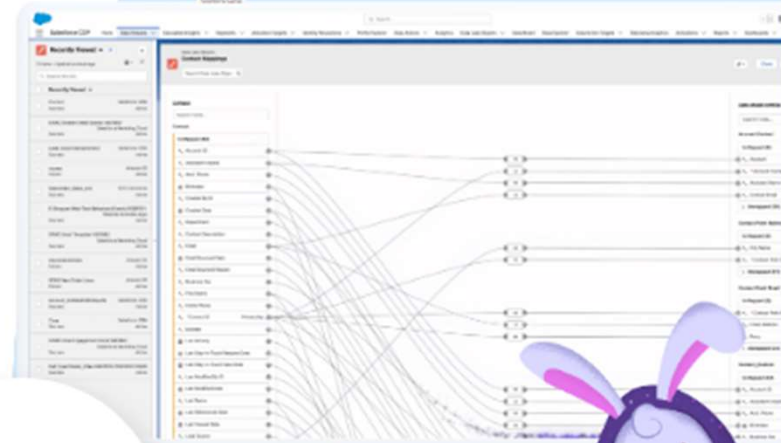
Real-Time Einstein AI

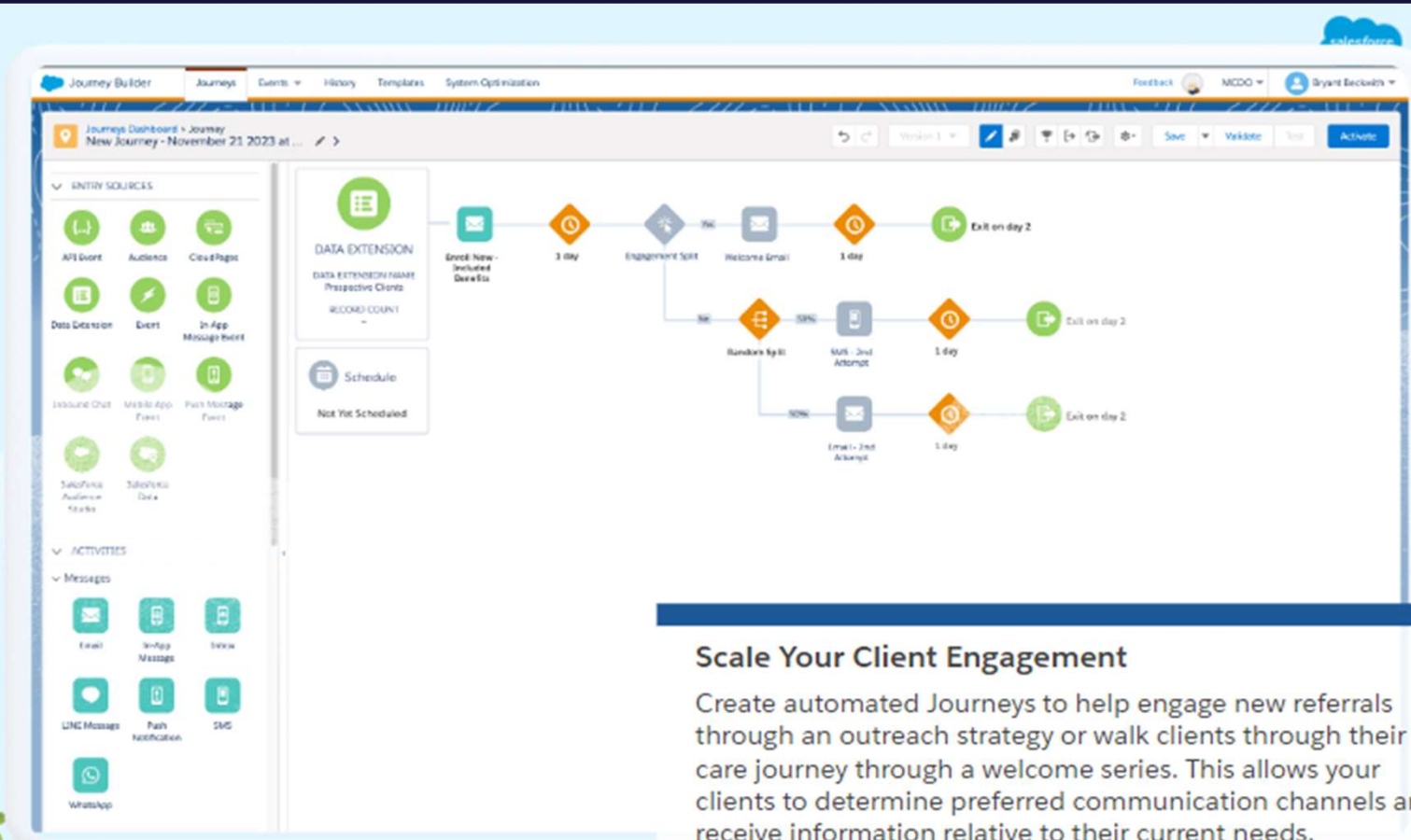
Real-Time Hyperscale Data Platform

Transactional Database

Hyperforce

100B
records
processed daily





Scale Your Client Engagement

Create automated Journeys to help engage new referrals through an outreach strategy or walk clients through their care journey through a welcome series. This allows your clients to determine preferred communication channels and receive information relative to their current needs.





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