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Community Foundations Optimizing Your Donor Portal Journey

WELCOME

Today's Presenters

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Industry Experience: 20+ years

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Industry Experience: 15+ years

KNOWLEDGE

Learning Objectives

Identify current trends impacting Community Foundations

Demonstrate Salesforce Donor Portal capabilities and ways it can aid in enriching relationships

Understand the next steps in the journey for a seamless pledge-to-cash process

Community Foundations

Agenda

- Current trends impacting Community Foundations
- Salesforce Donor Portal capabilities
- How to start/next steps

Current Trends Impacting Community Foundations

TABLE 1: DONOR-ADVISED FUND METRIC OVERVIEW ($ BILLIONS EXCEPT AS NOTED)

	2020	2021	Change
Charitable Assets	$167.81	$234.06	39.5%
Total Grants	$35.68	$45.74	28.2%
Total Contributions	$49.58	$72.67	46.6%
Payout Rate*	24.2%	27.3%	12.7%
Average DAF Size	$167,748	$182,842	9.0%
Number of DAF Accounts	1,007,745	1,285,801	27.6%

SOURCE: 2022 DAF Report from the National Philanthropic Trust

Current Trends Impacting Community Foundations

- **Staffing concerns**
  Demographic drought, talent competition, looming recession

- **Harnessing technology through automation and "digital workers"**
  Automate manual, repetitive and tedious tasks, free up time for activities with greater mission-impact

- **Increased regulatory pressure**
  DAF reform, contribution requirements, taxable donation cap

- **ESG and impact investing**
  Aligning underlying investments with donor and organizational values

- **Contributions of illiquid or non-cash assets**
  Crypto, parking lots, buildings, privately held stock, complicated businesses, etc.

- **Sunsetting technology and creating a "single source of truth"**
  FIMS sunsetting their donor portal, integrating systems for a single source of truth, increase utilization of third-party data, utilizing operational and financial data together

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Salesforce Donor Portal Demo

- **Donor Engagement**
  - Fund Balances
  - Gifts
  - Grants
  - Donor-Advised Fund Requests

- **Foundation Engagement**
  - Review, Approve, & Disburse Donor-Advised Grant Requests
  - Collaboration

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Next Steps

- **Assess your current systems**
  Are they adequate for your needs? What kind of bridge support do you need? What systems are critical to invest in or replace?

- **Identify gaps and prioritize your needs and wants**
  Which items are the ones you can't operate without? Which items could be a future phase?

- **We can help!**
  System health check, vendor selection, implementation, training

NOT SURE WHERE TO START?
Salesforce Health Check

Overview

For clients already using Salesforce, Armanino offers a complimentary Health Check, assessing your return on investment (ROI) and risk review, with a focus on mission-critical items.

- Custom code versus configuration
- Custom field counts, data storage and API limits
- Effective use of process builders and workflows; and a high-level assessment of the components in use by the client.
- Effective use of out-of-the-box functionality
- Deployment status of recent Salesforce functionality
- Available user and feature licenses
- Lightning readiness, if applicable

What You Can Expect

2-3 Hours of User Interviews
Meet with Salesforce subject matter experts for 2-3 hours with your Salesforce user group.

Assessment Report
Report detailing the assessment performed and the health of client's Salesforce org, with explanations of critical items that may need attention, including a high-level estimate of the cost to implement the recommended actions

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Armanino Led Virtual Classes

Whether you have new employees that need to get up to speed quickly, or simply need to learn more about the features and functionality of Salesforce, check out our **Armanino Academy**!

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Thank you for attending

Additional Questions?

Reach out to us at:

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