YFC Fundraising Structure of Salesforce

Purpose: understand how to map your Fund ID's to Salesforce

The YFC Salesforce HOA spent many months determining the most systematic, scalable approach to entering donation data into Salesforce. This framework enables us to standardize all manner of training, data-entry, and data-output (reporting) across the movement. Ideally every new donation will be coded according to this structure. Legacy data (gifts from your old system) will retain all historical data, but will also be mapped according to our new fields as best as we can using a "Fund Mapping Worksheet" which you will be provided. Please review the following field definitions:

- **Parent Campaign:** These are your most overarching fundraising efforts (Annual, Camp, Direct Mail, Events, Other, etc.). Parent Campaigns are an umbrella over all of the specific and unique ways that your chapter raises money via individual Campaigns. Parent Campaign Reporting will give you a high-level snapshot of how money is raised.

- **Campaign**: This is the very specific marketing effort used to raise funds. It is what effort motivated the person to give. In The Raiser's Edge, these were called "appeals" (i.e. defined as the method of solicitation). Using Campaigns will allow you to measure ROI (i.e. was "X Campaign" worth the investment based on the cost per dollar raised, or "How did "Campaign X" do this year, compared to "Campaign X" last year?). You will have many unique campaigns to track in Salesforce.

- **Designation:** A gift designation describes <u>HOW the money will be used</u>. These are the equivalent of Raiser's Edge funds. The designation is the financial purpose--what the donor will "feel good" about giving to and see on their donation receipt. We want to help chapters streamline this category because it also ties to the options a donor will see when they give to your ministry online (so less is more). Some rules to follow for designations are:

  - Is it a Core National Ministry (Campus, Life, JJM, Parent Life)?
  - Is it an item that you track as a revenue/expense category in your accounting software (e.g. General Fund)?
  - Is it a designation that represents 5% or more of your total Chapter revenue (Core National Ministries excluded as they are automatic designations)?

- **Sub-Designation:** This is where you can track a specific School, County, Ministry Site, etc., etc.. In Salesforce, the Designations and Sub-Designations are "field dependent". This means whenever a specific Designation is selected, only the related Sub-Designations will populate.

- **Staff Association:** This is how you'll assign fundraising credit to your staff so you can measure their financial goals. The Staff Association field on the Donation record is different than the "Staff Connection" on the Contact. There is a way to track both separately so staff mailing lists can be produced for NON-donors and donors alike.

Example of Mapping Document

EXAMPLE Legacy System Fields		EXAMPLE New Salesforce Fields				
Legacy Fund	**Legacy Fund ID**	**Parent Campaign**	**Campaign**	**Designation**	**Sub-Designation**	**Staff Association**
014- Golf tourney	014-GOLF	Events	Golf 2014	General		
014- Bowlathon	014-BOWL	Events	Bowl 2013	Campus Life	George County	
014- Staff-Joe Nelson	014-JOEN			Campus Life	Morris County	Joe Nelson
014- Staff - Sue Nelson	014-SUEN			Foster Care	Everett County	Sue Nelson
014- General	014-GEN			General		
014- Board Gifts	014-BOARD	Annual	Board Gifts	General		
014- City Life Banquet	014-CITYLIFEBQ	Ministry Campaign	City Life Banquet 2014	City Life	George County	
014- Year End Mailer	014- YEAREND14	Annual	Year End	Campus Life	Morris County	

Example of End Goal – Online Giving Page Example

https://westsound.yfc.net/donate/