Why Community Foundations Need a Salesforce Partner Who Understands Foundations

Description

Community foundations are different.

I donâ??t think thatâ??s a controversial statement. Most people in our industry understand that community foundations have unique business processes, unique reporting requirements, and a level of fund accounting complexity that doesnâ??t exist in many other nonprofits. The problem is that foundations often choose a Salesforce implementation partner based on Salesforce expertise alone.

Before Clark Nuber, I ran technology for a community foundation. Now I help foundations implement Salesforce. From both sides, Iâ??ve seen how much the choice of partner matters. Hereâ??s what Iâ??d want every technology leader at a community foundation to know before they choose one.

Your Foundation Runs on Funds, Not Fundraising

A community foundation is organized around funds. Donor-advised, designated, field-of-interest, scholarship, and agency funds each have their own balance, fees, investment pool earnings, spending policy, grants, and donor statements. All of that has to be tracked accurately, reported to finance, and communicated to donors.

Salesforce Nonprofit Cloud is built mainly around fundraising for the organization itself: donors, campaigns, programs, and volunteers. Thatâ??s a different operating model. At a community foundation, donors contribute to funds, the foundation administers those funds, and grants flow out of them.

When a partner configures Salesforce around fundraising assumptions, the fund model gets bolted on top of a structure that wasnâ??t designed for it. Getting it right takes more than Salesforce skills. It takes an understanding of fund accounting and how a community foundation actually operates. When an implementation partner does not bring that experience, the foundation ends up providing it. Staff have to train the partner on how funds, grants, finance, and donor services work, often while also learning Salesforce and making decisions about their future system. That is frustrating for the foundation and creates a real risk that important requirements will be missed or misunderstood.

What Happens When the Partner Doesnâ??t Understand Foundations

The system gets built around generic not-for-profit assumptions, usually because those assumptions are already built into Nonprofit Cloud. Then the problems start to show up:

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Donor-advised Funds Become Awkward Workarounds or Get Overly Complicated

Nonprofit Cloud does not provide a complete architecture for donor-advised funds, so the implementation partner must design one. A well-designed fund model connects gifts, grant recommendations, balances, statements, and donor relationships from the start. Without that purpose-built fund model, every new fundholder request becomes a test of how far the system can stretch due to having to reverse engineer these relationships. The end result: increased system complexity, inefficiencies, inconsistent data, reporting challenges, and a greater potential for errors.

Fund Statements Become Custom Projects

Fundholders expect a clear statement showing contributions, investment earnings, fees, grants, and the ending balance. When the system wasnâ??t designed with that statement in mind, the data is scattered across objects or missing altogether. Staff end up rebuilding each statement cycle by hand or paying for custom development.

Reporting Doesnâ??t Match What Finance Needs

Finance needs to ensure fund balances, spendable amounts, and investment allocations tie to the general ledger. A generic build reports on gifts and campaigns, which answers a development question, not an accounting one. The two teams end up working from different numbers and spend their time reconciling them.

Staff Waste Time on Manual Processes Because They Donâ??t Trust the System

Once the numbers donâ??t line up, people stop relying on the system and start relying on their own files. Those spreadsheets quietly become the real source of truth, maintained by a few people and understood by even fewer. Thatâ??s a risk to accuracy, to continuity when staff leave, and to the investment the foundation made in Salesforce.

At that point, the foundation is doing more than implementing a new system. It is also training the implementation partner on how community foundations work, often while correcting design decisions based on assumptions that do not fit. That frustration is not a Salesforce problem. It is a partner-experience problem.

Salesforce Isnâ??t the Problem

Salesforce isnâ??t the problem. The problem is that the design was done without understanding how a community foundation actually operates. Those first design decisions are hard to undo because so much gets built on top of them. The way funds are modeled and gifts are tied to them become the base that integrations, automations, reports, and donor statements depend on. By the time the gaps show, changing that base means reworking everything built on it.

Thatâ??s why the cost isnâ??t just the implementation fee. Itâ??s also the years spent living with decisions that seemed reasonable at the time and what it takes to finally fix them. Fixing a weak Salesforce system configuration is rarely a quick adjustment. It often means redesigning the data

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model, cleaning up and migrating years of records, rebuilding integrations and reports, and retraining staff on a system theyâ??ve already learned to work around. For many foundations, that ends up costing as much as the first implementation, on top of everything theyâ??ve already spent.

What Good Looks Like

When Salesforce is configured by someone who understands community foundations, the system works the way your foundation works. That means:

- Funds are managed by type, spending policy, investment pool participation, and restrictions, and the whole team can see fund details.
- Donor statements are generated in Salesforce and delivered through a donor portal.
- The full grant lifecycle, from review through payment and disbursement, lives in one place.
- Fund balances sync from the accounting system, so staff and donors see accurate numbers.

When a foundation asks me how to evaluate a Salesforce partner, I tell them to stop comparing hourly rates and feature demos and start asking:

- Have you implemented Salesforce for community foundations?
- How do you handle donor-advised funds and fund statements?
- Who on your team understands fund accounting?

The answers will tell you whether a partner can configure Salesforce for how your foundation operates or only for how Salesforce works out of the box.

The Clark Nuber Approach

Our team is made up of accountants who work with community foundations every day, alongside Salesforce implementers. That combination is the difference. We understand fund accounting, spending policies, investment pools, and what your auditors expect. So, when we configure Salesforce, we start from how your foundation actually operates, and your desired future state, not from what Salesforce does out of the box.

That understanding affects everything from how gifts and grant recommendations are processed to how fund balances, spendable amounts, fees, and investment activity move between Salesforce and the accounting system (i.e., Sage Intacct). The goal is not simply to pass data between systems. It is to make sure finance, development, grants staff, and donors are all working from information they can trust. This ultimately leads to an enhanced donor and staff experience and greater mission impact.

Because we design the integration between Salesforce and the accounting system from the start, the two systems are integrated, not just connected. Connected systems pass data back and forth. Integrated systems share business logic, so a change in one place shows up correctly everywhere else. Thatâ??s what lets finance, development, and grants staff trust the same numbers.

Next Steps

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Salesforce can serve a community foundation well, but the early design decisions matter. How funds are modeled, how gifts and grants connect to them, and how balances move between Salesforce and the accounting system will shape workflows and reporting for years. Whether you are choosing a partner, planning an implementation, or evaluating an existing system, look for a team that understands both Salesforce and how a community foundation actually operates.

Whether youâ??re choosing a partner, planning an implementation, or evaluating your current setup, contact Clark Nuberâ??s Software Solutions team to talk about a Salesforce system customized for your foundation.

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