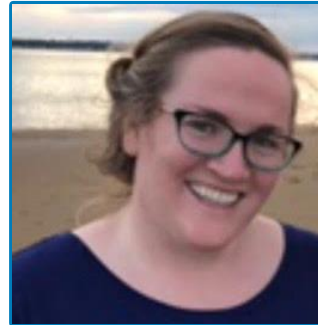




Salesforce's New Grants Management Solution: Outbound Funds Module

Maura Hackett, NEO Philanthropy
Nell O'Connell, Community Catalyst
Shari Carlson, North Peak Solutions



Thank You to our Champion Sponsors



SERCANTE

Agenda

- I. OFM Demo
- II. Discussion:
 - What kinds of teams does OFM work for?
 - What other applications or systems do I need to consider?
 - How can I manage this work?
- I. Audience Q&A

Poll:

Who's in the room?



All ▾

Search...



Outbound Funds

Home

Accounts ▾

Contacts ▾

Funding Programs ▾

Funding Requests ▾

Reports ▾

Dashboards ▾

Requirements ▾

Tasks ▾



Funding Request

2020 - Ready 4K - 12345

+ Follow

Edit

Clone

Delete ▾

Status
Awarded

Awarded Amount
\$500,000.00

Requested Amount
\$500,000.00

Details

Requirements

Disbursements



Requirements (5)



New

Change Owner

5 Items • Sorted by Due Date • Updated a few seconds ago

<input type="checkbox"/>	Requirement Name ▾	Assigned ▾	Type ▾	Status ▾	Due Date ↑ ▾	Completed ... ▾
1	Letter of Intent		Letter of Intent	Complete	7/31/2020	7/24/2020 ▾
2	Request Budget	Shari Carlson	Budget	Complete	9/17/2020	9/17/2020 ▾
3	Budget		Budget	Complete	9/30/2020	9/24/2020 ▾
4	Grant Agreement Contract	Katie Taylor	Contract	Complete	11/30/2020	11/13/2020 ▾
5	Final Report	Katie Taylor	Report	Open	1/31/2022	▾

View All



Funding Request Roles (3)

[FR-000001](#)

Contact:

Phillippe Armand

Role:

Grant Manager

Status:

Current

[FR-000002](#)

Contact:

Marie Yoon

Role:

Financial Manager

Status:

Current

[FR-000003](#)

Contact:

Emma Lovell

Role:

Applicant

Status:

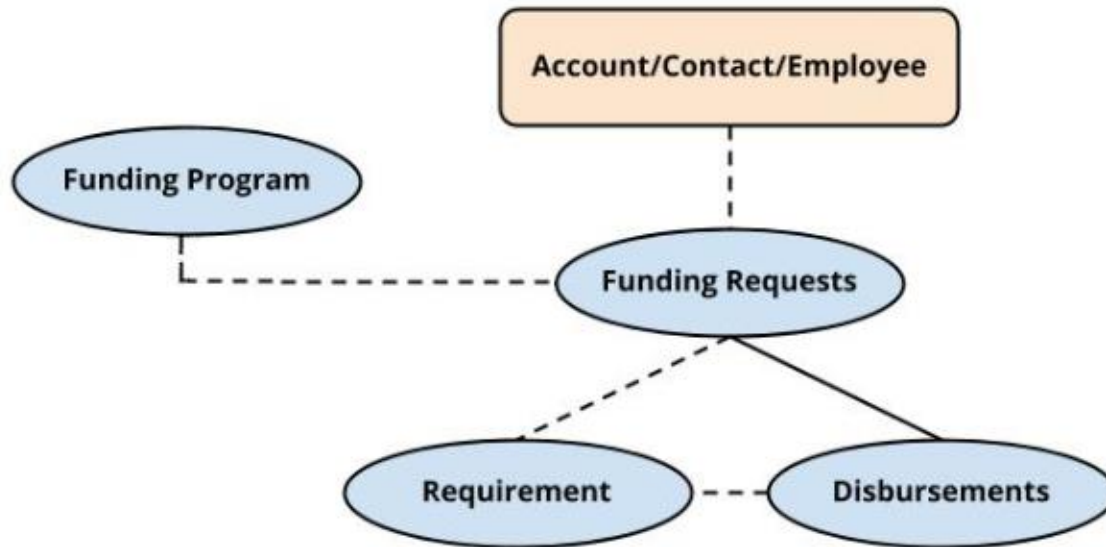
Current

View All

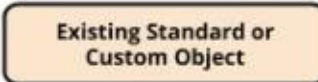



Activity

Chatter

Files



KEY

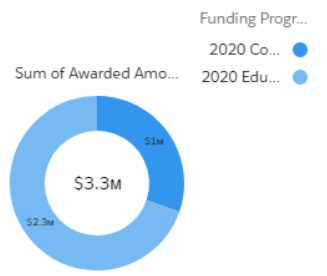
-  Existing Standard or Custom Object
-  New Custom Object
-  Lookup Relationship
-  Master/Detail Relationship

Dashboard
Outbound Funds

As of Jan 26, 2021 7:45 PM-Viewing as Shari Carlson

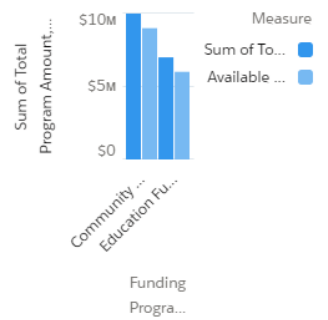
Open Refresh Subscribe

Awarded Grants by Docket



[View Report \(Awarded Requests by Year by...\)](#)

Funding Program Available F...



[View Report \(Parent Funding Program Anal...](#)

Grants Awarded this Year

\$3.3M

[View Report \(Awarded this Year\)](#)

Disbursed this Year

\$50k

[View Report \(Awarded this Year\)](#)

Today's Tasks



Nothing due today. Be a go-getter, and check back

[View All](#)

Recent Items (3)

- 2020 - Womens Advocates - 12350**
 Status: Awarded
 Awarded Amount: \$300,000.00
 Requested Amount: \$300,000.00
- 2020 - Ready 4K - 12345**
 Status: Awarded
 Awarded Amount: \$500,000.00
 Requested Amount: \$500,000.00

Requirements
My Open Requirements

7 items • Sorted by Due Date • Filtered by My requirements - Status • Updated a minute ago

Settings Refresh Edit

	Requirement Name	Funding Request	Assigned	Type	Status
1	<input type="checkbox"/> Request Budget	Test Request	Shari Carlson	Budget	Open
2	<input type="checkbox"/> Due Diligence: Board and ...	Test Request	Shari Carlson	Due Diligence	Open

Women's Advocates

Primary Contact
Phone
Website
Total Gifts: \$0.00



Funding Program

2020 Education Fund Open Application

Status	Start Date	End Date
In progress	1/1/2021	12/31/2021

Details

Program Analysis

Funding Requests

Funding Program Name

2020 Education Fund Open Application



Owner

[Shari Carlson](#)



Parent Funding Program

[Education Fund](#)



Funding Program Manager

[Katie Taylor](#)



Top Level



Application Due Date

9/30/2020



Status

In progress



Start Date

1/1/2021



End Date

12/31/2021



▼ Description

Description

2020 Open Application for Education Fund



▼ Program Totals

Total Program Amount

\$4,000,000.00





Funding Request
2020 - Womens Advocates - 12350

+ Follow Edit Clone Delete ▾

Status	Awarded Amount	Requested Amount
Awarded	\$300,000.00	\$300,000.00

Details Requirements Disbursements

Funding Request Name	2020 - Womens Advocates - 12350	Owner	Shari Carlson
Funding Program	2020 Education Fund Open Application	Close Date	
Application Date	9/13/2020	Closed reason	
Status	Awarded		

▼ Purpose

Geographical Area Served	Twin Cities Metro
Population Served	Children and Youth;Women
Requested For	Provide active educational options for kids during the summer school break.

Funding Request Roles (1)

FR-000000	
Contact:	Nancy Anderson
Role:	Applicant
Status:	Current
View All	

▼ Applicant

Applying Organization	Women's Advocates
Applying Contact	Nancy Anderson

▼ Award Information

Awarded Date	11/12/2020	Term Start Date	1/1/2021
		Term End Date	12/31/2021
Terms			

▼ Disbursement Information

Requested Amount	\$300,000.00	Available for Disbursement	\$0.00
Recommended Amount	\$300,000.00	Paid Disbursements	\$0.00
Awarded Amount	\$300,000.00	Total Cancelled	\$0.00



Disbursement
D-00029

Funding Request	Amount	Status
2020 - Womens Advocates - 12350	\$100,000.00	Scheduled

Details

Requirements

GAU Expenditures

Amount	Status
\$100,000.00	Scheduled
Scheduled Date	Type
11/20/2020	Initial
Disbursement Date	Disbursement Method

System Information

Created By	Last Modified By
Shari Carlson , 11/20/2020 12:35 PM	Shari Carlson , 1/26/2021 8:01 PM
Funding Request	Disbursement
2020 - Womens Advocates - 12350	D-00029



Approval History (0)

Thank You!

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Thank you for coming



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