



IT Team

SalesForce/Volunteer SignUp

Build Out

Location

Virtual/Shining Hope Farms' Mt Holly Farm
328 Whippoorwill Lane, Mt Holly, NC, 28120
(704) 778-5308 or (704) 827-3788

Cost

IT Volunteer Hours for Impact Day Event

Number of Volunteers Needed

3 volunteers

Number of Volunteer Hours Needed

1 Day or multiple days
2-4 Hours per volunteer each day
Total volunteer hours: 12

Description of Project

Shining Hope Farms is currently leveraging the Power of Us program for 10 free licenses on Sales Cloud & Service Cloud. We purchased an App called Equi-force, which is built on top of the Nonprofit Success Pack (NPSP). While we would love to have a single platform to manage the farm, Salesforce is currently utilized for contact and horse management, scheduling, tracking of scholarships, and recording client notes for non-insurance riders. We use Kindful for donation management and ClinicSource for insurance filing and therapy records. Volunteers have contact records in salesforce, but management is primarily through SignUp Genius and google docs.

A few projects we sighted for the near-term are:

- leveraging Experience Cloud to enable a SF-powered schedule that can be viewed in the barn aisle and up-to-date in real-time.
- Another is re-architecting our schedule to accommodate recording cancellations and substitutions.
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- A third is to migrate from SignUp Genius to Salesforce - we have the list of volunteers in salesforce (but not the active list) as well as some intake and hour logging forms drafted, but not rolled out. We need to evaluate our gaps for volunteer management and likely build/tweak some things before we could go-live with volunteer management in SF.

Skill Level

Level 5 High

1. **Low Level** = painting, raking, digging, gardening, planting, and cleaning
2. **Low to Moderate Level** = following assembly instructions, working with hand held tools: pitch forks, loopers, trimmers, hammers, Allen wrench, quick tight, Phillips head, wrenches, levels, hand post hole diggers)
3. **Moderate Level** = must have an adult to do this level, use of power tools and equipment (cordless branch trimmer, cordless and gas weed eater, cordless drills, saws, mower, climbing ladders)

4. **Moderate to High** = construction projects requiring previous skills for following plans, knowledge of construction tools for determining angles, plume, square, and level. (mixing and pouring cement, using tractor, post hole driller, Kubota, nail gun)
5. **High Level** = requires a license or professional certification or have performed these duties for a living at some time. (IT Skills, Electrical, plumbing, roofing, framing, pouring cement platforms)

Materials List

Suggest Vendor: Deloitte IT Team

- Presentation of Salesforce use for Community Outreach
- Partnership with Corporate IT team Members and our Salesforce Administrative Team at SHF