Avalanche Center

Event Management Assessment

Prepared by Pedal Lucid, Spring 2025

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Executive Summary

The purpose of the Assessment is to evaluate the best approach for managing events within Salesforce, and lay the groundwork for an integration with the new website. The overall vision is a design that can meet (or flex to adapt to) the needs of all avalanche centers. The website will not require Salesforce to create events, but would be the supported integration option. This report takes into consideration documentation, written questions and video calls with Sierra and Northwest Avalance Centers, as well as an overview of Sawtooth's current setup and technology stack.

It focuses on ease of use, native functionality, integrations, and additional use cases. Emphasis was placed on a solution that is simple and easy to manage for a small organization but could also scale to support more sophisticated needs of larger centers, plays well with other tools, and has the flexibility to adapt to known and unknown additional use cases.

In short, Pedal Lucid recommends using Campaigns to manage events for avalanche centers and as the point of integration for the new website.

Introduction

The options

Two possibilities were evaluated in this assessment: the 'core' Campaigns and Campaign Members objects, or the Program Management Module ("PMM"). We did not evaluate a fully custom architecture or objects that require a third-party application; there is no reason to build something from scratch that already exists, and no reason to design around a third-party tool when the end goal is to incorporate registration and events management into your own custom application.

Use cases

The following types of events were reviewed across multiple centers:
- Awareness
- Trailhead outreach
- Volunteer management
- Field courses run by partners/local providers
- Field courses run by the center
- Workshops
- Paid and free fundraising events
- Events run by partners/others
- Other events that do not fit into one of these categories

In addition, an events solution needs to be compatible with any type of Salesforce installation: the Nonprofit Success Pack ("NPSP", the free package most nonprofits use to manage Salesforce), Nonprofit Cloud ("NPC", the new nonprofit product offering from Salesforce that is slowly replacing NPSP, but also more complex to manage and creating some backlash) and a Salesforce instance that does not use either NPC or NPSP (unlikely this would be the approach any centers select).

Solution design

A website integration is not a prerequisite for adopting an effective event management solution. Centers can begin to centralize events data within a standard framework to prepare for a future website integration; this will also facilitate easier reporting across different types of events.

Depending on the pace of work, it could be viable to pilot a Salesforce / website events integration for one or two centers for '25/26 season. This could include creating events in Salesforce that push to the website and can be displayed on a calendar, filtered, etc. The website should also support adding events on the back end not via Salesforce. This assessment did not include in-depth integration analysis—such as whether a sync should be bidirectional—but focused on selecting the correct objects in Salesforce to store events data.

The simplest approach would be to sync only the events to the website, and include a link to sign up or for more information. End users would be redirected to any form solution the center uses (potentially different tools for different types of events, even within a single org).

Adding signup functionality to the website could be done in a subsequent phase of work or rolled out at the same time. This is likely quite a bit more complicated. At a technical level, upserting Contacts in Salesforce and linking them to the right event would not be a large lift. The challenge comes in creating an interface that is flexible enough to manage different types of event signups:

- Different centers or types of events within centers will likely require different mandatory and optional fields that may need to be created and stored on an ad hoc basis
- Events could be paid or free; adding payment processing is another element to consider
- Optional add-on donations during event registration would add yet another layer and likely require creating Opportunities in Salesforce
- Determine where attendance status is logged—would this be processed on the back end of the website and synced to a Salesforce status field, or happen within Salesforce (this would require a custom build to make the process smooth)

There are a variety of relatively inexpensive apps that manage event signups, including several that are already in use by different centers and syncing data to Salesforce. We recommend sticking with this approach for an MVP rollout and adding a custom signup process only when there is significant volume and a compelling reason not to use a third party tool. Even if the centers decide to prioritize a supporter login on the website, it could still be possible to leverage Salesforce as the source of truth for historic event participation while deferring building out a custom registration module.

A final consideration of the overall approach is how these features could be rolled out to other centers. One approach is to simply rebuild the same customizations in each org; this could be partially scaled through deploying what has already been built, but would still require updates per org for any future enhancements. The other option is to develop and implement a managed package. This allows changes

to be made in a centralized place and pushed out to any orgs with the app installed. A managed package is significantly more efficient to scale, but also much harder to revert any changes and is a higher lift to set up. Our recommendation is to pilot the integration without using a package, and then reevaluate and potentially rebuild into a package before rolling out to more than 2-3 centers.

Analysis

Simplicity and ease of use

Campaigns have a much simpler data model than PMM. They use two objects (Campaign and Campaign Member), and use a 'parent' concept to optionally create a nested or hierarchical structure. PMM uses eight custom objects that allow much more granular tracking of individual 'services' provided, but this creates greater complexity. The primary potential use case that would be easier to solve in PMM than Campaigns for avalanche centers is recording partial attendance for multi-day courses. This gets somewhat cumbersome with Campaigns (either use child campaigns to track attendance each day, or a custom object related to Campaign Members). PMM Service Sessions and Service Deliveries are specifically designed to track delivery/attendance over time in a way that Campaigns are not.

During discovery, neither SAC nor NWAC indicated that per-session attendance tracking was of high value for multiple-session events/courses. If this grew in importance or was critically important to another center, we expect that setting up a custom attendance tracking object related to Campaigns down the road would be a lower net lift than using PMM. Other than this narrow use case that was not flagged as particularly important, Campaigns will be easier to manage and meet all the needs of the centers.

Native functionality

PMM and Campaigns each have some particular built-in features that are unique compared to other Salesforce objects and products.
- The primary potential advantage of PMM is some of the built-in features to enter service deliveries (which would represent event attendance) in bulk and/or streamlined data entry. This allows staff to either log attendance fairly quickly for a pre-determined schedule or on an ad hoc basis. However, these features emphasize retroactive desktop data entry over real-time mobile and would likely not be a great tool for handling in-person attendance tracking. Additionally, similar functionality could be replicated using Salesforce flow or custom components for Campaigns.
- Campaigns have several distinct advantages

- The most compelling is native mass email capabilities. From a Campaign, users can easily email some or all members of the campaign from within Salesforce with no third-party tools or customization. This can be used for both standard and ad hoc event communication with participants, and would benefit both small centers with no integrated email marketing solutions as well as larger centers with integrations who simply need to send a quick email update to event participants without building a marketing email
- Opportunities relate directly to Campaigns; this is the default way to attribute revenue to a particular initiative (like an event, or annual appeal). In addition to tracking attendance, Campaigns would also provide a standard way to associate donations or purchases with each event via the Primary Campaign Source field.
- Native 'cost' fields (budgeted vs actual). These could easily be replicated on PMM records, but are available OOTB on Campaigns. This was noted by SAC as a point of interest—the overall cost to the organization to run events compared to the revenue they generated.
- Hierarchical rollups provide summaries of total contacts, cost, and opportunities (revenue) at an individual campaign level or in the entire hierarchy. There are multiple approaches for how to structure hierarchy (by date, type of campaign, theme) that would require additional evaluation before creating a standardized way hierarchies should/must be used across centers, but even if the structure were unique to each center the rollups would be helpful.
  - Regardless of hierarchy design, we recommend using the standard Type field on Campaign to differentiate between different categories of events. Standardizing terminology across centers (Awareness, Course, Outreach Event, etc) is recommended.

Integrations

Custom website

There are no compelling reasons why either Campaign Members or PMM objects are more or less suited to an integration with the new website, other than the overall complexity of PMM noted above.

Although pivoting from one design to another down the road is not a desired outcome, this is a viable possibility after a pilot year if new compelling reasons to change course are identified. Objects and field names are easy to identify, user legible, and changes would be straightforward to implement within the summer off-season. The overall design of the solution—with a table that represents upcoming or past

events linked to Contacts via a junction object—is very similar for both PMM and Campaigns. We do not anticipate a major change in architecture will be required (shifting from Campaigns to PMM), but a more likely pivot would be moving from a unique build per org to a managed package as noted above in Solution Design. This would require adjustments to any code that referenced custom field names.

Third-party vendors

Extending Salesforce via other third-party apps is a compelling reason to use Campaigns over PMM for events management.

- PMM is a relatively niche product with few, if any, major commercial products supporting it with out-of-the-box features
- Campaigns are widely used by many third-party applications, typically for marketing needs but event management is another common use case
  - Tools already in use by SAC and NWAC such as Eventbrite, Classy, Donorbox, MCAE/Pardot, and Volunteers for Salesforce have some type of connection to Campaigns, but nothing related to PMM
  - Other integrations are *much* more likely to provide OOTB support for Campaign management but not PMM
- Either approach is fully supported with custom forms, such as FormAssembly (in use by NWAC, and a very popular product with nonprofits in general)

Additional use cases

Instructor management

NWAC noted that managing course instructors is an existing pain point. Each course can have one or more instructors who need some level of management for onboarding, follow-up, and invoicing.

- We do not recommend incorporating this use case into a website integration, at least in the near- to mid-term
- Neither PMM nor Campaigns provide an OOTB way to manage this kind of relationship
- Our recommended approach is to create a custom junction object between Contact and Campaign to manage instructors or course leaders
  - This avoids inflating Campaign membership numbers, including hierarchy numbers (this is a reason not to use child campaigns)
  - It will make it easy to view a separate related list of instructors on the Campaign, and build reporting and custom processes that are totally distinct from attendees

- The main downside to a custom object design vs using standard Campaign Members is that you lose the ability to easily customize and send bulk Salesforce emails to the instructors. This downside is not enough to justify a different approach, and can be overcome in several ways: using standard language and automated emails for key parts of the process such as requesting an invoice, sending from an integrated 3rd party tool, rolling up instructor details to Contacts to send via List View, or managing instructor communication via personal inboxes

Volunteers

Neither PMM nor Campaigns are fantastic solutions for managing volunteers. The Volunteers for Salesforce app ("V4S")—in use by NWAC—is a common (free) tool for volunteer management. Although it does use Campaigns to some degree, the architecture is closer to PMM. Volunteer schedules and shifts provide the type of granular tracking the PMM affords even though Campaigns serve as an umbrella for V4S.

Given the complexity of volunteer management, we do not recommend prioritizing a unified solution specific to volunteers for website integration in the near- to mid-term. As long as events could be created on the website without a Salesforce record (or with a custom signup link) these could be added manually and linked to the volunteer platform of choice. Organizations without a separate volunteer platform could use Salesforce campaigns to manage volunteer signups concurrently with other types of events.

Lead generation

Events were cited as an opportunity to engage new supporters; as long as Contacts are created and added to Salesforce + marketing tools for follow-up, either PMM or Campaigns can be used as a point of intake/lead generation. However, Campaigns will be much more effective at standardizing how a person first came into contact with the center from a lead generation perspective, because they can be used for *all* marketing activities, not just events. Email list signups, first-time donors, P2P fundraisers and direct mail outreach can all leverage Campaigns to track engagement, and sit alongside events to evaluate acquisition effectiveness.

Revenue

Noted above as standard Campaign functionality, Opportunities are directly linked with Campaigns as part of standard Salesforce features. Campaigns are intended to track different types of initiatives (events, fundraising appeals, retargeting ads) and provide a unified way to report on revenue generated by these

activities. There is no out of the box connection between revenue and any PMM objects. A custom relationship could be created but this is not in line with how the module is intended to be used.

Observed event metrics

NWAC noted that some event metrics that are important to capture are estimates that do not include specific named contacts. For example: estimated number of users at trailhead outreach events, estimated attendees at a brewery awareness event, etc. Either Campaigns or PMM are capable of adding a few custom fields to track "observed" numbers. These will not automatically roll up as part of standard campaign hierarchy features, but can be used to complement the number of known contacts.

Technical considerations

There is not a strong technical reason to select PMM or Campaigns or vice versa. Campaigns are a standard Salesforce object available with all Salesforce editions. PMM is a managed package application, but is free and can be installed in a standard Salesforce Org, in conjunction with NPSP or in the new Nonprofit Cloud product.

- Campaigns and Campaign Members have a few limitations vs other objects, but these should not have a major impact on avalanche centers or the website integration. Campaigns are widely used across many types of Salesforce implementations and the limitations are known and workable.
    - Unlike most other objects, Campaign Member audit fields cannot all be set on record creation. This is a small downside when importing historical data, but there are workarounds (use a custom field) and should have minimal impact on the centers
    - Salesforce Experience Cloud, its community portal product, has several tiers of licenses that provide different levels of access. Campaigns and Campaign Members require the highest and most expensive 'partner' tier to view (as do Opportunities). We do not expect any centers to pursue an Experience Cloud solution for a customer portal; it makes a lot more sense to build a custom portal as part of the new website. Using a single dedicated integration user and custom business logic to control user access within the portal eliminates the need to design around Experience Cloud limitations or licenses
- PMM is an application managed by Salesforce using custom objects. It does not have some of the nuanced technical limitations that come with Campaigns; on the other hand, it is not part of the core Salesforce platform.
    - It is unofficially supported in NPC and can be installed in any org, but there is some risk that the package is eventually sunset by Salesforce. This is unlikely to be a factor for many years but is worth calling out, especially with the transition from NPSP to NPC.