**MONISHA.DUSANAPUDI**

**Phase 1: Problem Understanding & Industry Analysis**

**Non-Profit Donation & Volunteer Management**

**1. Problem Statement**

Growing non-profit organizations frequently face significant operational challenges due to the use of disconnected and inadequate tools for managing their core activities. Critical information is often siloed, with donation data residing in spreadsheets, volunteer coordination happening via email, and event planning managed in separate calendars.

This fragmentation leads to three primary problems:

1. Operational Inefficiency: Staff spend an excessive amount of time on manual, repetitive tasks such as data entry, sending individual thank-you notes, and manually compiling reports from multiple sources. This administrative burden detracts from their ability to focus on mission-critical activities like fundraising and community engagement.
2. Lack of a 360-Degree Supporter View: Without a unified system, it is nearly impossible to know if a major donor is also a recurring volunteer, or if a one-time volunteer has the potential to become a recurring donor. This lack of a complete supporter profile results in missed opportunities for personalized engagement and deeper relationship-building.
3. Inability to Make Data-Driven Decisions: The absence of a centralized data source makes it extremely difficult to generate real-time, accurate reports on key performance indicators. Leadership cannot easily track fundraising trends, measure volunteer engagement, or calculate the return on investment (ROI) of their campaigns, hindering strategic planning and growth.

This project aims to solve these problems by designing and implementing a single, scalable, and intelligent solution on the Salesforce platform.

**2. Requirement Gathering**

To address the problem statement, the following high-level requirements were identified:

* Core Functionality: The system must provide robust functionality for tracking the complete donor lifecycle. This includes managing individual and corporate donations, processing one-time and recurring gifts, and logging in-kind (non-monetary) donations.
* Reporting & KPIs: The application must be able to track and report on the key performance indicators (KPIs) that are essential for a non-profit's success. These include, but are not limited to, total funds raised per campaign, volunteer hours logged per event, donor retention rates, and average donation amounts.
* Automation: The solution must identify and automate key manual processes to improve staff efficiency. A primary requirement is the automation of personalized communications, such as sending immediate donation receipts and thank-you letters to supporters.

**3. Stakeholder Analysis**

The success of the project depends on meeting the needs of several key stakeholder groups:

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| **Stakeholder Group** | **Primary Interest / Need** | **Impact on Project** |
| End Users (Staff) | User-friendly interfaces, efficient workflows, and easy access to reliable data for fundraising, volunteer, and program managers. | Their needs directly drive the UI/UX design and the core functionality of the application. |
| Donors | A seamless donation process, timely acknowledgment of their contributions, and confidence that their data is secure and their gift is being used effectively. | Their experience is a critical measure of success. The system must support personalization and prompt communication. |
| Volunteers | An easy way to find and sign up for opportunities, receive reminders for their shifts, and have their service hours accurately tracked and acknowledged. | Their experience is key to retention. The system must make volunteering easy and rewarding. |
| Management | Access to high-level dashboards and reports to track KPIs, monitor progress towards goals, and make strategic decisions for the organization. | Their needs drive the entire analytics and reporting layer of the application. |

**4. Business Process Mapping**

To ensure the solution is designed correctly, two core business processes were mapped out:

* Donation Lifecycle: This process maps the journey of a donation from the moment it is received to its final reporting. It includes steps for initial data entry, processing, linking the donation (Opportunity) to the correct supporter (Contact), generating a receipt, and reflecting the donation in overall fundraising totals.
* Volunteer Lifecycle: This process maps the journey of a volunteer from their initial registration to the completion of a volunteer shift. It includes steps for a new volunteer to express interest, be matched with and sign up for a specific job or event, receive automated reminders, have their hours logged and approved after their shift, and be acknowledged for their contribution.

**5. Industry-Specific Use Case Analysis**

To ensure the application meets real-world needs, several industry-specific use cases were analyzed:

* Campaign Management: The system must support the ability to plan, execute, and track the effectiveness of various fundraising initiatives, such as annual galas, online giving appeals, and targeted campaigns, in order to measure their ROI.
* Volunteer Engagement & Skills Matching: The application should allow coordinators to match volunteers with specific jobs or events based on their stated skills, interests, or availability, and to send automated reminders for upcoming shifts to reduce no-shows.

**6. AppExchange Exploration**

An analysis of the Salesforce AppExchange was conducted to identify existing solutions and best practices. This led to a critical strategic decision:

* Core Packages: The project will be built upon the foundation of two industry-standard managed packages:
  1. Nonprofit Success Pack (NPSP): This will be used for its advanced donor management, householding, and fundraising features.

By using NPSP as a base, the project can accelerate development, adhere to non-profit best practices