

Outbound Funds Module 101

What You Need to Know about the New Salesforce.org Product for Grantmakers

In June 2020, [Salesforce.org announced](#) they are adding the community-built Outbound Funds Module to their suite of open-source offerings for nonprofit organizations.

This technology can revolutionize the Grants Management Systems (GMS) space [like the Nonprofit Success Pack did for nonprofit CRM](#)-- creating an [industry-standard solution](#) that can flexibly adapt and evolve with organizations.

North Peak has worked closely with the team developing this product since its [inception in 2017](#), and we're excited about the potential that Salesforce.org's resources can bring to Outbound Funds-- what they're calling "the future of grantmaking."

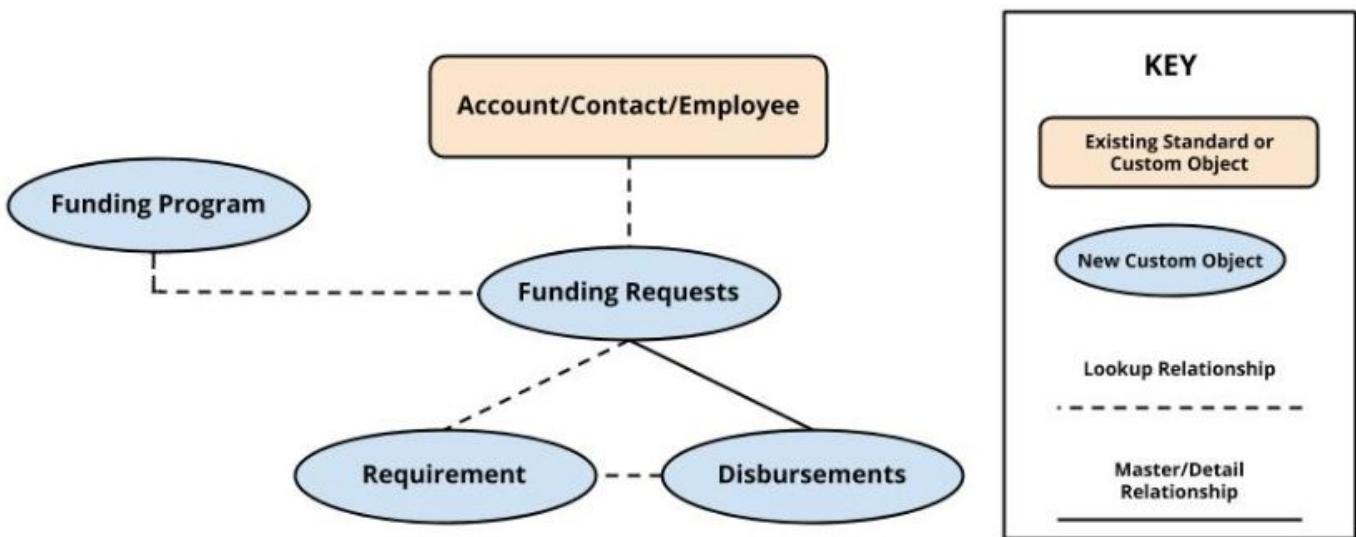
Why are we so excited about this product? And what do grantmakers need to know about it?

What is the Outbound Funds Module?

The Outbound Funds Module is a free, open source product that customizes Salesforce for grant management. It is installed directly into Salesforce and uses existing Salesforce features and tooling. Its highly configurable architecture to streamline management of:

- **Funding programs** - Create unlimited funding programs that indicate total funding available, requested, and paid.
- **Funding requests** - Track funding requests, including total funds requested, funding program applied to, status, completed and outstanding internal tasks, and applicant contact information.
- **Applicant and grantee requirements** - Manage items owed to your organization or owed to the grantee.
- **Disbursements** - Record and schedule disbursements of funds, and track this data at the grantee, funding program, and global levels.

The [core version of the Outbound Funds Module](#) can be installed for any Salesforce org.



Organizations can also leverage an [extension](#) with the Nonprofit Success Pack to combine grant management and donor management functionality in their system.

Where did the Outbound Funds Module come from?

The module was created by the Salesforce.org community. A group of Salesforce users, developers, and consultants [got together at a Salesforce community sprint in 2017](#) and began building an open-source, community-supported solution to customize Salesforce for grantmaking organizations as well as other fund distribution situations.

Outbound Funds was created as an alternative to existing options for grantmakers leveraging the Salesforce platform, including:

1. Extensive customization to Salesforce to architect grant management from scratch. This can result in a system that closely aligns to the organization's processes. However, it can be costly, difficult to maintain, or make it hard to collaborate with other like organizations.
2. Purchasing and implementing a fully configured product, which can provide robust functionality out of the box. But all-in-one products can also be challenging to adapt for unique needs.

[In June 2018](#), Outbound Funds was released as a free, open source product. For the first time, grantmakers had a solution they were able to personalize while retaining the ability to collaborate with other organizations on best practices for setup, configuration and customization. Since then, with support from [Salesforce.org's Open Source Commons program](#), over 50 volunteers have contributed to enhancements, changes, and upgrades. They have responded to community feedback while keeping to the original vision of providing a light core framework that is widely applicable and adaptable.

What else will organizations need to do to tailor their solutions?

Organizations will invest in different levels of customization depending on the complexity of their needs:

Simple: Teams whose core needs are centered in tracking the data outlined above can likely use the Outbound Funds application by itself, doing some configuration so Salesforce mimics their processes.

Moderate: Teams whose needs include online form submission, document management, and e-signature can add apps or integrations to external providers for these functions. Salesforce's Appexchange offers a ready market of these solutions.

High: Teams with complex needs will configure Salesforce more extensively, possibly developing custom applications or integrations to sophisticated grantee portals.

Organizations can take a modular approach to their solution, changing it over time as their processes and approach evolve.

It should be noted that Salesforce.org has announced plans for a "premium, paid product" built on top of the Outbound Funds Module "that will provide options for organizations to create applications with more flexible form building and multi-step processes, conduct due diligence, manage budgets, and provide community portals." This product is planned for release in Fall 2020 and may provide options for organizations with moderate- and high-complexity needs.

North Peak's proven [implementation process](#) can serve as a guide to determine the best solution for teams today and ensure its adaptability over time.

What's the benefit of a GMS built on Salesforce?

The Power of Community

A shared data model for grant management in Salesforce means that grantmakers can customize their own systems and still align with (and help define) industry best practices. By standardizing with peers on a common platform, grantmakers can more easily collaborate and learn from each other's processes and approach. They can harness the [incredible power of the Salesforce community](#) to promote the product's continual evolution in response to their real & changing priorities.

The Flexibility to Meet Unique Needs, Today and in the Future

Outbound Funds is an intentionally light framework. [Use cases](#) range from competitive grants, regranting, designated funds, grants to individuals, and more. Organizations of varied sizes and approaches can add customization to suit the way they work.

The Potential of a Platform

Salesforce's platform-based model enables organizations to add or integrate functionality for application management, digital engagement, finance and accounting, and more. And, it provides best-in-class functionality for fundraising, event management, marketing, and analytics. Because Outbound Funds is built with native Salesforce

features and tooling, organizations are not limited in leveraging these other features or in their choice of connected systems. Instead, adding Outbound Funds to this mix results in a sophisticated grant management solution that's suited specifically for the implementing organization.

This platform approach to CRM design ensures the technology's long-term sustainability, enhances organizational transparency, enables cross-functional collaboration, and creates more complete insights on impact.

What organizations are a good fit for this solution?

We have seen an Outbound Funds-based solution work for grantmakers of different sizes and types; from private and family foundations to community foundations to crowd-funding platforms to grantmaking nonprofits.

The technical characteristics of organizations that are well-suited for Outbound Funds include:

- The team wants to adapt their technology to reflect their unique needs
- The team has workflows that require sophisticated customization or automation
- The organization aims to assemble a suite of best-in-class technology for grant management, marketing, applicant portal, and other functions (as opposed to using one solution for all of these)

The key to success with the Outbound Funds module is clarity on technology strategy and strong organizational investment. Salesforce + Outbound Funds is a platform-based approach to GMS, which requires a higher level of ownership on the part of the organization using it. The solution can work well for teams that:

- **Have a clear vision for their technology.** Outbound Funds' light framework means teams will need to customize it according to their priorities. A clear vision shines a light on those priorities and promotes strong user engagement.
- **Have well-defined processes.** Outbound Funds is responsive to the way teams work, though exception-based customizations can quickly lead to a bloated, hard-to-use system. Teams that invest in defining and standardizing process are well-positioned for Outbound Funds.
- **Have capacity to support and evolve their system.** Since teams will tailor their Outbound Funds solution for their needs, it's essential they build skills to support users. It's also essential they're able to identify and prioritize opportunities to improve or change the solution over time, in a way aligned to organizational goals.

Where can I learn more?

Find resources on the Outbound Funds module and its users here:

- [Outbound Funds Wiki](#)
- Videos:
 - [Demo of package functionality](#)
 - [How to Create a Funding Program and Funding Request](#)
 - [How to Create Requirements for a Funding Request](#)
 - [How to Create a Disbursement](#)
- [Sign up for updates about Outbound Funds](#)

If you are a Salesforce user, join the [Outbound Funds community in the Power of Us Hub](#).

About North Peak

North Peak is a Salesforce consulting firm focused exclusively on nonprofits, grantmakers and other organizations in the philanthropic sector. We prioritize contributions to open source community projects, including Outbound Funds: Since its inception, North Peak consultants have helped lead the Outbound Funds group, connecting with nonprofits about their priorities, helping create the package, and sharing information about Outbounds Funds on the Salesforce online community, at conferences, and at user groups. We are experienced at implementing the Outbound Funds Module for organizations of varying needs.

North Peak's team is available for exploratory conversations as you consider whether an Outbound Funds-based solution is a good fit for your organization. Reach out [here](#).