

Land and Water Partnership
Salesforce Database for Membership & Donor Relations

Memorandum of Agreement for Program Participants

Background: The Land & Water Partnership has had a pilot project for three years researching and developing software systems to aid Rhode Island's watershed organizations and land trusts with management of their membership and fundraising records, renewal process and fundraising appeals. Our goal is to help you be more efficient and more effective raising funds.

One outcome of this project is an adaptation of the Salesforce database template for non-profit organizations to simplify its use for basic membership and fundraising purposes. Our consultant has also developed an add-on to the Salesforce database to help track monitoring and stewardship activity for protected lands and general volunteer activities.

Funding & Development:

This project was supported by grants from Third Sector New England and The Rhode Island Foundation. The Project is coordinated by Meg Kerr (Narragansett Bay Estuary Program) & Rupert Friday (Rhode Island Land Trust Council) as an initiative of the Land & Water Partnership. Special thank you to the people and organizations participating in the Pilot Project over the past three years: Helen Tjader and Clare Durst from Barrington Land Conservation Trust, David Francis from The Westerly Land Trust, Lori Urso, Daniel Aube, Chris Fox from Wood-Pawcatuck Watershed Association, Jenny Pereira and Bruce Hook from Woonasquatucket River Watershed Council, and Gail Gifford, Cause and Effect.

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The Land and Water Partnership will help your organization adopt the Salesforce database modified for our Partnership. We will:

- Connect you with Idealist Consulting - the consultant we have used to develop the database modification - so that they can set you up with this template.
- After an initial commitment of \$200 by your organization, the Partnership will pay additional costs up to \$550 for consulting services by Idealist Consulting toward the initial cost of setting up your database with the Partnership's design modifications. (Idealist's total charge for setting up this database is \$750.)
- Provide you with tip sheets we have developed for using this template.
- Provide you with 10 hours of coaching/mentoring support by people involved in the Partnership's development and pilot use of this database.

Your organization is choosing to participate in this program and agrees to:

- Have your Board of Directors make a commitment toward the initiative with a Board resolution deciding to implement Salesforce as your membership and donor relations database.
- Have at least two designated contacts - board members, staff, or committee members - who agree to take the on-line training module for basic use of the Salesforce non-profit template and implement it for your organization.
- Contribute \$200 toward the costs of having the consultant adapt the Salesforce template to the Partnership's modifications. (toward the total cost of approximately \$750)
- Have a plan in place for initially entering your membership data into the template. If you decide to convert an existing database or spreadsheet with the aid of a consultant, you recognize that you are responsible for those costs.
- Participate in program evaluation. This involves tracking the benefits your organizations sees from adopting the software during the first two years (number of members, increase in donations, etc.) and reporting this annually to the Partnership. Program evaluation may also include completing a survey. (We want to be able to tell the foundations that funding this project the benefits it is producing.)
- Participate in meetings/conference calls 2 times a year with other organizations in RI using Salesforce to discuss your experiences and any problems you are encountering.
- Once you are up and running, you will mentor other board members, volunteers, etc. that are using Salesforce in your organization and provide 10 hours of mentoring to other organizations that adopt the Partnership's template.

Name of Organization:

Organization Representative:

Signature:

Date:

Land and Water Partnership Representative:

Signature:

Date: