

WEBINAR • JULY 30, 2026

Building a Modern Fundraising Tech Stack on a Nonprofit Budget



Start small. Build intentionally. Scale when you're ready.

Idlewild Partners — Who We Are

2015

Founded · women-owned

26

Full-time team

350+

Nonprofits served

469

Projects completed

We work exclusively with nonprofits and mission-driven companies.

Founded by Staci Rice, a veteran Salesforce consultant implementing for nonprofits since 2008.





YOUR PRESENTERS



Staci Rice

Founder & CEO, Idlewild

18 yrs Nonprofit Salesforce focus



Katie Healy

Implementation Consultant, Idlewild

112 # of Nonprofit Salesforce Fundraising Implementations

AGENDA

Today's Session

- 01 The Crawl, Walk, Run framework
- 02 What a lean fundraising tech stack actually looks like
- 03 Live demo — Salesforce Nonprofit Accelerator + Give Lively
- 04 Key takeaways
- 05 Q&A



THE QUESTION WE HEAR EVERY DAY



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“Is Salesforce too big for our nonprofit?”

— Wrong question.

ASK THIS INSTEAD

What's the smallest version of Salesforce that solves our problems today?

Salesforce can be whatever size you need it to be.

The Silver Bullet Era

The story that took hold

Since 2000, Salesforce's Power of Us program has donated Enterprise licenses to nonprofits — suddenly putting Fortune 500 technology in reach.

Combined with a sector-wide push to “be more data-driven,” one belief took hold: **fund one big implementation, turn it on, and technology solves the problem.**

“Unpacking the Box”

So nonprofits funded large, all-at-once builds: every app, every feature, every automation turned on at go-live.

Whether or not anyone had asked for it — or would ever use it.



ONE SIZE DOESN'T FIT EVERY NONPROFIT

\$100K $\neq$ **\$100M**
nonprofit nonprofit

Technology should grow with your organization — not the other way around.

Crawl. Walk. Run.

Build only what you need today. Then expand intentionally.

01

Crawl

- Constituents & Relationships
- Tagging & Audience Segmentation
- Revenue (Donations, Grants, etc.)
- Campaign Management (Appeals)
- Give Lively for Digital Fundraising
- Email Marketing
- Key Development Reports



02

Walk

- Activity tracking
- Forecasting & projections
- Allocations (Gift Restrictions)
- Wealth screening
- Document Generation Ack. Letters
- Advanced reporting



03

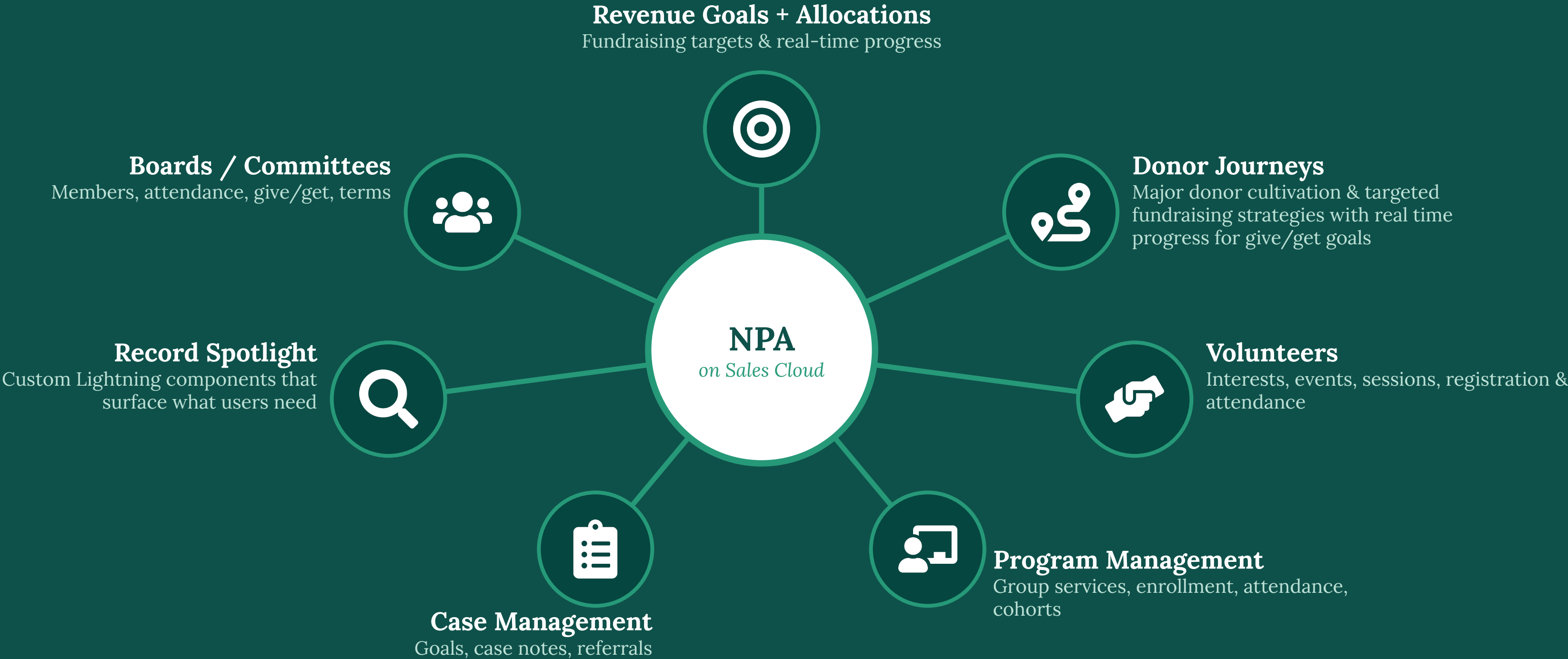
Run

- Revenue Goals
- Donor Journeys
- Board/Committee Management
- Advanced Automations
- Integrations at scale
- AI



Scale Smart: Modular by Design

Add each module only when you need it – every one unlocked, every one yours





Meet Starlight Cinema (using NPA Essentials)

A nonprofit transforming communities through the power of filmmaking

Before we open Salesforce, here's the story we'll walk through:



THE ORGANIZATION

Starlight Cinema

A nonprofit running community film programs — the account at the center of our demo.



People



Appeals



Orgs



Events



Revenue



Reports



THE EVENT

Annual Summer Benefit

Their signature fundraiser, sold and promoted through **Give Lively** and tracked as a campaign.



Tickets



Donations



Sponsorships



Online Donations,
Recurring Gifts, Events



THE DONOR

Eugene

A supporter whose giving, volunteering, and personal network reach across the whole organization.



Household



Contributions



Relationships



Volunteer



Board Chair



Activities



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NOW, LET'S SEE IT IN ACTION

Live Demo

Salesforce Nonprofit Accelerator + Give Lively

KEY TAKEAWAYS

Salesforce is Iterative

01

There's no finish line. A successful CRM evolves over time.

03

Add features because your team asks for them — not because they're available.

02

If you aren't doing it today on spreadsheets, don't build it in Salesforce today.

04

Some years you invest heavily. Other years, you simply maintain.



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Q&A

Questions We Hear Most

How much does this really cost?

NPA Essentials implementations start at \$25K, with Salesforce 10 free licenses through Power of Us and Give Lively's platform free to use.

How long does it take to launch?

Most Crawl-stage builds go live in about four weeks.

We already have Salesforce — NPSP or NPA. Now what?

We build on what you have. Crawl, Walk, Run applies whether you're starting fresh or right-sizing an existing org.

DEBUNKING THE COST MYTH

What Starting Small Actually Costs

\$0	Salesforce Power of Us — 10 donated Enterprise licenses
\$0	Give Lively — free fundraising platform, free native Salesforce sync
From \$25K	Idlewild NPA Essentials — a lean Salesforce foundation
~4 weeks	Typical time to go-live

The real investment isn't licensing — it's thoughtful configuration your team will actually use.

Q&A

*Questions > Drop them in the Q&A box. We'll
answer as many as we can.*



Ready to Right-Size Your Salesforce?

Reach out to Idlewild for your custom NPA Essentials estimate.

idlewildinc.com/nonprofit-essentials

email: staci.rice@idlewildinc.com

HOW WE BUILD

Idlewild's Package Design Principles

An Accelerator, not a fixed product — a custom solution tailored to fit how you work - without starting from scratch

Unlocked — you own it, you control it

Admins empowered to lead — your team runs the system, not a vendor

No recurring or ongoing fees, no added licensing — pay for the install, and never again

Platform over code — Built using Declarative Salesforce features (95% drag-and-drop), upgraded on every SF release

No technical debt by design — use what you need, change or delete the rest

Expert-guided implementation — a proven head start, tailored with a skilled partner

NPA Essentials

Providing a strong fundraising foundation

Nonprofit Accelerator “Out of the Box”

- Householding
- Address Management
- Connections (Relationships)
- Campaign Management
- Constituent Tags



- Gifts Rollups (Hard/Soft Credits)
- Grants & Deliverables
- Payments
- Recurring Donations
- Reports/Dashboards

Connect Third-Party Tools



Online Donations,
Recurring Gifts, Events



Email Marketing