

SEEKING A SALESFORCE DEVELOPER (OR DEVELOPMENT TEAM) FOR JUST ROOTS

WHO IS JUST ROOTS?

Just Roots is a social justice organization that builds equity, connection, health, pride and empowerment in our community and beyond through food-based programs and systems change. Our farm, programming and advocacy efforts connect people to food, opportunity and one another. We do our work by growing food; connecting people of all ages and life experiences with the land; running an all-income CSA (we've got the biggest SNAP-enrolled low-income CSA in the state); cooking community meals; developing partnerships with schools, health insurance companies, legislators, health clinics and other resource agencies; researching the health outcomes of CSA participation and more. We build direct access, models, momentum and evidence for change in agricultural policy, food policy, healthcare policy and social justice. We are a small, efficient, farm-based organization with a goal to change the food system and bring more equity to the world.

OUR SITUATION:

During the past 5 years Just Roots has operated using a custom built Filemaker Pro database solution that barely meets our needs. The volume and sophistication of our work has increased dramatically during the past year, and we have short-term grant funding to move our data onto the Salesforce platform which will be better suited for our long-term future.

We seek a highly qualified Salesforce developer individual or team that can work extensively on this project during an urgent six-month timeline (see the following page for our ideal implementation schedule)

Our ideal candidate(s) would have proven experience in these areas:

- implementing and customizing the Salesforce NPSP for the fundraising and community development needs of non-profit organizations
- implementing solutions for managing products, invoicing, and the collection and processing of online and cash payments
- the new Salesforce PMM (Program Manager Module)
- special needs of the healthcare industry and HIPAA compliance
- Deep care for user-experience/functionality that facilitates a smooth, easeful and supportive work environment for staff/partners and smooth communication/information flow with community members
- A track record of delivering services ontime and in budget and that meet the expectations of the customer (references required)

In addition, our ideal candidate would be a team or be connected with other developers with whom they have a history of collaboration that they could bring in in order to meet project deadlines.

We are Immediately accepting applicants. *We are interviewing qualified applicants on a rolling basis, so if you think you are the right fit for this position, please reach out!* COMPENSATION: \$100/hr Please email: **nathan@justroots.org** to inquire.

PROJECT TIMELINE: February-June

Exact priorities, order and timeline subject to change

PHASE I -- DATA TRANSFER: FEBRUARY 2021

A database of Just Roots contacts (**Names, Addresses**), with **donation history**, and **program participation history** (memberships, events attended, payments), **general & confidential notes, other misc information** (household demographics, business affiliation, healthcare provider, role, etc) is moved from Filemaker into Salesforce, and all staff are able to use Salesforce to lookup contact information, add notes, record donations, pull reports on contacts individually and collectively etc.

PHASE II -- PROGRAM SERVICES WITH INVOICING: MARCH 2021

Salesforce is equipped to manage CSA memberships (and any other future program services) in a way that can handle: - multiple types of memberships / services / products / options / pickup-days / delivery locations / prices / payment methods / payment schedules / delivery routing / invoicing / payment collection / attendance / notes

Just Roots should be able to pull reports based on program data (eg: type of membership, product, delivery location) etc.

PHASE III -- REFERRALS / DATA EXCHANGE: APRIL 2021

A HIPAA compliant (if necessary) solution is built and/or adopted that allows:

- (1) Just Roots can receive referrals by logging into online portals of other agencies (AuntBertha / Look4Help / UniteUs) and transfer that data into Just Roots Salesforce -- first via (a) manually reading and retyping, (b) then by export/import, then (c) via automatic API transfer (if needed).
- (2) Just Roots can report back to other agencies with data about client participation in our services via (a) retyping it into other agencies' portal, (b) sending via export/import data file, then (c) automatic API transfer (if needed).
- (3) Other agencies can securely log in to a Just Roots web "portal" to (a) make referrals of clients into Just Roots services and (b) view reports about client participation/notes

Just Roots should be able to pull reports based on program data (eg: type of membership, product, delivery location) etc.

PHASE IV -- FORM CONNECTIONS & FINANCIAL PROCESSING: MAY 2021

Salesforce is connected via webhooks to a form-building platform and a payment platform where staff can effectively construct clear, logic-based forms hosted on the Just Roots website so that people from the outside world can:

- (a) register for events and programs
- (b) make online donations
- (c) make payments on invoices
- (d) provide survey responses/input

Just Roots must be able to pull reports based on enrollment status, payment status, donations made for certain campaigns or during a certain time period or at a certain level, survey responses, financial projections, money received etc.

PHASE V -- COMMUNICATIONS CONNECTIONS: JUNE 2021

Salesforce is connected to an **email sending platform and texting platform** where transactional and bulk emails and texts can be sent - ("Mail Chimp, Sendgrid, Constant Contact") These platforms should gracefully handle:

- unsubscribes & bouncebacks,
- templated transactional messages ("welcome to our CSA", "friendly payment reminder"),
- and bulk sending of nicely-formatted mass emails (newsletters, appeals)\

Just Roots must be able to pull reports on/for communications.