FROM SPREADSHEETS TO SALESFORCE: HOW NORTHBAY'S ORGANIZING PROJECT ENHANCED ITS FUNDRAISING EFFICIENCY

Summary

NorthBay partnered with BIT to enhance its fundraising operations within Salesforce. The goal was to improve donor and grant tracking while maintaining cost efficiency. By integrating Mailchimp and optimizing the existing Nonprofit Success Pack (NPSP), the team successfully transitioned NorthBay's fundraising workflows from spreadsheets into a centralized, streamlined Salesforce system.

About BIT

We believe talent is universal – but opportunity is not. As a nonprofit workforce development partner and Salesforce consulting expert, focused on advancing career pathways for professionals with disabilities, we help organizations harness technology to achieve lasting impact. Our team brings firsthand insight and technical expertise to every project, including work completed by BIT apprentices gaining real-world experience through our nationally registered apprenticeship program. From rebuilding Salesforce environments to advancing accessibility, BIT delivers sustainable solutions that empower both organizations and the communities they serve.

About NorthBay

NorthBay is a nonprofit outdoor school dedicated to helping underserved communities by fostering middle school students' social, emotional, and academic growth through immersive experiences in nature. Founded in 2005 on the shores of the Chesapeake Bay, NorthBay serves more than 20,000 students each year and has reached over 300,000 across the Mid-Atlantic. Through its rentals program, NorthBay also welcomes thousands of organizations annually for retreats and community-building—expanding its impact beyond the classroom.

Key Takeaways

Strategic use of Salesforce can eliminate manual processes, reduce costs, and create a centralized view of fundraising data – enabling organizations to focus more time and energy on their mission.

FROM SPREADSHEETS TO SALESFORCE: HOW NORTHBAY'S ORGANIZING PROJECT ENHANCED ITS FUNDRAISING EFFICIENCY

BiT
BLIND INSTITUTE OF TECHNOLOGY

Challenge

- Fundraising efforts were fragmented and managed through spreadsheets.
- Limited utilization of Salesforce's existing NPSP functionality.
- Need for improved tracking of donor relationships, grants, and campaigns.
- Cost and complexity of migrating to Salesforce Nonprofit Cloud.
- Lack of integrated marketing tools for donor outreach.

Solution

- Integrated Mailchimp with Salesforce to streamline donor and grant communication.
- Configured Opportunities and Campaigns within NPSP to track fundraising initiatives.
- Migrated all historical spreadsheet data into Salesforce for unified data management.
- Leveraged existing NPSP features to optimize workflows without costly upgrades.
- Provided strategic guidance on maximizing Salesforce tools for future growth.

Results

- Successful migration of legacy fundraising data into Salesforce.
- Improved visibility and accessibility of donor, grant, and campaign data.
- Centralized tracking system for both education sales and fundraising operations.
- Increased efficiency and reduced manual entry for staff.
- Established foundation for measurable results in upcoming quarters.

Testimonial

"BIT was a true partner in our Salesforce journey. They listened, set clear expectations at every stage, and guided us to fully adopt the Nonprofit Success Pack. Their deep expertise, accessibility-first mindset, and personable team made the process smooth—and genuinely enjoyable. The solutions they built didn't just work; they empowered our staff to use Salesforce with confidence every day. And knowing this work also supports real employment opportunities for professionals with disabilities made the partnership even more meaningful."
- Matt Wrabley, Director of Development at NorthBay Education