



## Why use donor management software?

- Demonstrate accountability
- Limited resources, technical expertise and skills
- Tap into information that you have
- Pull information into one system



## Why use donor management software?

- Streamline and automate processes
- Improve solicitation process
- Diversify funding
- Build & maintain institutional knowledge



## Comparing software packages

- Important to comparison shop – avoid reinvestment
- Multiple packages to choose from
- Won't find the perfect program
- Determine appropriate package to meet your needs



## Comparing software packages

Donors	Cost Range	ASP-online/ Monthly	Annual Support	Implementation Costs
Less than 5000 donors	\$2,000 - \$5,000	\$50 - \$100	\$600 – \$1,500	\$500 - \$1,000
5,000 – 50,000 donors	\$4,000 - \$20,000	\$125 - \$365	\$800 - \$3,500	\$800 - \$2,000
50,000 +	\$10,000 - \$100,000	\$475 - \$800	\$1,500 - \$10,000	\$1,000 - \$5,000



## Comparing software packages

Less Expensive	Mid-range	Expensive	On-line
<ul style="list-style-type: none"> <li>•Giftworks - \$299</li> <li>•Exceed Basic - \$499</li> <li>•Fundraiser Basic - \$89</li> <li>•Fundraiser Select - \$1150</li> <li>•NonprofitBooks Online - \$1200</li> </ul>	<ul style="list-style-type: none"> <li>Fundraiser Pro - \$2800</li> <li>Giftmaker - \$2990</li> <li>Donor Perfect - \$2995</li> <li>Exceed Premier - \$3095</li> <li>Sage FR - \$2900</li> <li>FR Paradigm - \$2900</li> </ul>	<ul style="list-style-type: none"> <li>•Raiser's Edge - \$6,000 +</li> </ul>	<ul style="list-style-type: none"> <li>eTapestry – first 500 records are free; \$31/mo. up</li> </ul>

## Selection process

- Many variables to consider
- Technology changes quickly
- Evaluate your needs first for best results
- Establish a plan that will sustain several years

## Selection process

- Assess your needs, practices, capacity, growth plans, infrastructure ...
- Utilize your long range plan
- Determine your current fundraising activities
- What would you like to do different or better?

## Selection process

- Determine what kind of information you want to pull from the system
- List current reporting/evaluation tools and their uses
- Conduct an inventory
- Analyze and document processes – current & desired

## Selection process

- Analyze human resources
- Determine training needs
- Decide how much you want to spend
- This process is invaluable in understanding the full picture of what's involved in raising funds



## Prioritize features to meet needs

- What are functional requirements?
- What are donor management requirements?
- What are specialized needs?
- What compromises are you willing to make?



## Prioritize features to meet needs

- How easy is the software to use?
- What is the company's history
- What kind of assistance is available?
- What kind of documentation do they provide?



## Compare software with your needs

- Research
- Compare prioritized needs, future growth, customization, support ....
- Consider total cost of ownership
- Select vendors & develop comparison chart



## Compare software with your needs

- Contact vendors
- Try the product
- Understand all of the costs
- Eliminate and select



## Act and implement

- Create an implementation plan
- Determine oversight, roles and responsibilities
- Document processes
- Train



## Act and implement

- Clean, convert and migrate data
- Test new system then make the switch
- Check data and processes and staff– problem solve
- Continue training
- Sustain

