Introduction to Donor Data Management
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November 29, 2016

I. Introductions

II. Agenda Review

III. Who and What to Track

Contacts	Contact Data	Transactions
People/organizations: donors, volunteers, prospective donors, newsletter recipients, funders, clients, etc.	*Information about people/organizations*: names, addresses, phone #s, emails, employer, etc.	*Actions taken by or with people/organizations*: donations, pledges, memberships, donation requests, thank you letters, volunteering, communications

IV. What to Report (and Why)

- Donation history
- Membership renewals due
- Paid or unpaid pledges
- Gave two years ago but not last year
- Donors at certain giving levels
- Solicitation history
- Volunteers with certain skills
- Results from a solicitation or event
- Comparisons over two or more years
- What else?

V. What are you Using Now?

VI. Types of Data Tracking Software/Systems

A. Excel/other spreadsheet
- Best if not using a database or commercial product/service
- Keep eventual conversation to a database in mind:
  - Rows = records
  - Columns = fields

B. Basic, all-purpose database software
- Filemaker Pro (Mac or Windows)
- Access (Windows only)

> **Pros:** Flexible, customizable, robust, migrate-able. *Can do just about anything you can think of if you know how!*
>
> **Cons:** Need to know the program to get the most out of it; someone can customize for you and make it pretty user friendly, but you will always need someone with that expertise to solve problems, answer questions, make changes. *Making something simple is usually complex!*

C. Donor Management Software Products
- Cost usually varies based on number of records, features, and services.
- Cost of features and services can add up so don't rely solely on base monthly fee comparison. Contract commitment terms also vary.

> **Pros:** Lots of options, cost ranges, keeps improving, ongoing support that helps reduce need for a consultant!)
>
> **Cons:** Lots of options – can be overwhelming and hard to compare features; costs can be high, especially with added features and services. You may need a consultant to help evaluate your needs and choose.

A Few Leading Donor Management Systems (*Please note that prices shown here may have changed)*

- Donor Snap (www.donorsnap.com): starts at $39/month for up to 1,000 contacts - $199/month for up to 30,000 contacts
- Little Green Light (www.littlegreenlight.com): starts at $39/month for up to 1,000 contacts - $89/month for up to 60,000 contacts
- Donor Perfect (www.donorperfect.com): starts at $89/month for up to 1,000 contacts - $799/month for up to 75,000 contacts
- Bloomerang (https://bloomerang.co): $99/month for up to 1,000 contacts - $499 for up to 40,000 contacts
- E-Tapestry (https://www.blackbaud.com/fundraising-crm/etapestry-donor-management): $199/month for up to 1,000 records; $399/month for up to 20,000 records

Possible Features (Which do you need; how much do they cost?)

- Tracking of donors, donations, appeals
- Volunteer management
- Other communications: e-blasts, Constant Contact, newsletters
- Event registration

- Grants management
- Online giving/sales: web site integration; payment processing
- Integration with QuickBooks
- Number of users

Possible Services (Which do you need; how much do they cost?)

- Migration/customization
- Training: Videos, manuals, custom
- Support: Now much, how delivered, how available?

D. Constituent Relationship Management (CRM)

- If you have other needs and/or a complex donor cultivation/solicitation program, you may need something more robust and flexible.
- More developed than Filemaker Pro or Access (not quite a blank slate), designed to track people and interactions.
- Some free options, but requires expertise to configure, modify, and provide training/support.

CRM Examples

CiviCRM (civicrm.org); Salesforce (salesforce.org): Free (sort of)
- Very robust, flexible, customizable
- No support provided; Need a budget for consultant: initial and ongoing support
- CiviCRM integrates well with WordPress
- Use of Salesforce by nonprofits is growing

Sumac (sumac.com): Free and Fee Options
- Free option: Donor database with a limited number of donors
- Added cost: Combines donor database with other optional, customizable features: Sales, case management, grant management, volunteer management, membership, et al.
- Doesn't require as much expertise as CiviCRM and Salesforce, provides training and support as part of service.

VII. How to choose?

Suggested steps:

- Create a team; be sure to include the people who will be responsible both for implementing and who will be using on a regular basis. Best to appoint one person to lead – a regular staff

person, ideally. Also, consult/involve people in your organization who will use the data for planning, decision making, etc.

- Consider involving your web site designer re: web-site integration
- Make a list of features you need/want; data you want to track
- Review vendor websites
- Ask other organizations what they use and if they like it; ask about their overall experience
- Schedule demos: prepare with questions
- Use consulting expertise to help you make the choice that is best for your organization and possibly, if needed, help with the implementation. But not someone you need to rely upon on an ongoing basis.
- If you are using consulting expertise, involve him/her in the vendor demos.

Vendor demos are great for:
- Getting a sense of what it looks and feels like – and if it appeals to you
- Learning more about the company: Are they patient? Do they explain things well? Are they knowledgeable about nonprofit fundraising and data management? Do you get a good feeling about their customer service?
- Questions to ask: Do they provide data migration services and what does that cost? Do they provide any customization services/costs? What training and support do they provide/costs?

> **Cloud or not?** Cloud-based means you (and other users) can access your database from any computer on the internet. You can set user permissions to limit what certain users can do (from view certain data only to full editing privileges – and many options in between). Using the cloud also means you don't have to continually update or upgrade the software.

VIII.   Implementation & Use

After making the choice:
- Finalize the contract with the vendor
- Get your data ready for migration
- Work with vendor on data migration: This can be complex, tedious, time-consuming. Give yourself several months to accomplish this task. Ideally you've chosen a vendor with lots of experience and patience working with small, under-staffed organizations.
- Work with vendor on any necessary customization, including assigning users and privileges
- Get training on how to use the new system. Involve everyone who will be using it.

Ongoing Use:
- Assign one person to be in charge of tasks such being the point person with vendor, acting as admin for the database, managing data entry and reporting, training staff and volunteers. Make sure these tasks are part of someone's job from now on.
- Incorporate all costs into your operating budget (monthly fees, additional support costs)
- Ensure documentation about how your organization uses the system is in place (e.g., your data entry conventions, standard reports, etc.).
- Evaluate how well it's meeting your needs, consider what improvements need to be made.

IX.   Questions/discussion