the fundraising coach
FUNDRAISING IS AN EXTREME SPORT!

What to questions should you ask when considering fundraising software?

by Marc A. Pitman | Feb 22, 2011 | 4. Love (Stewardship), Guest Posts, Samples & Tools | 3 comments

This week, I'm pleased to introduce David Unger. David is an accomplished fundraiser and President of Unger & Associates. His years of experience have led him to create his own donor management and fundraising software system: Total Community Manager. I've asked him to share what questions you should consider when looking at getting a software package. You can reach David at solutions@davidunger.net

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by David Unger

There is a common misperception about fundraising software systems. The system doesn't raise money; it's the people who use the information from the system to effectively and efficiently raise the needed money for your organization.

When I work with a client to transition them from their current fundraising software system because it's "not meeting their needs", or from a spreadsheet to a commercial or custom built fundraising software system , one of the first questions I get is should I go with system "a" or system "b". Before I answer this, I ask the client to think through what information and the format for that information they need to help them raise more money.

When you are considering purchasing a new system, take the necessary time to explore or "map out" what you need from the system, especially to help maintain the necessary donor relationships and raise more money. Does the system:

- Have the flexibility to adapt to work within your current fundraising plan, or will you have to change to accommodate the system?
- Categorize and code different levels of donors to personalize their communication based on their level of giving?
- Track the relationships of people within the system?
- Provide the flexibility to create the reports the agency needs for its volunteers and staff to raise more money?
- Track volunteers, membership, classes, event participation and foundations?

- Help send different thank you letters to different donor categories?

When you plan for a new system have you:

- Planned and budgeted for the staff and or volunteers working with the system to receive the proper training? Is the training a "cookie cutter" approach or is it customized to maximize your fundraising efforts. You may save a couple of dollars in the short-term by reducing the training options, but it may cost you in the long term.
- Committed to the ongoing resources to keep the information updated?
- Determined that you have easy access to support?
- Learned from current and past users of the system what the ongoing themes of the support issues are?
- Determined that the program will be able to grow with your agency? Do understand what the limits of records are and will there be additional costs for that upgrade?

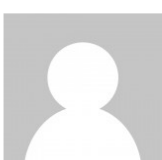
Then the final question is the cost. The sky is the limit as to what you can spend, but you need to decide if you really need all the "bells and whistles" that some of the larger systems offer.

It may sound great that you have "that" system, but will it help your staff and volunteers raise more money?

I encourage clients, especially smaller ones to explore some of the less well-known systems as there are great systems available for a fraction of the cost that provide customized training, direct call support, flexibility in licensing, and grant funding to help with purchasing the system for the agency.

Explore what you need from a system to raise more money, and look for the system that will support those efforts.

3 Comments



Tad Druart on February 22, 2011 at 10:02 am

avid, nice piece. We've worked with Advancing Philanthropy on an article for heir March issue about questions to ask of vendors when evaluting software. The underlying theme is that we both recognize is that the organization should be in control not the vendor. The combination of disruptive technology, open architectures and changing needs of nonprofits has created a shift from vendor/product-led world to a service-led world, where the nonprofit is in control. That's creating new and better applications for nonprofits of all sizes, and with cloud computing or Software-as-a-Service offerings organizations can