Keys to a Successful Conversion
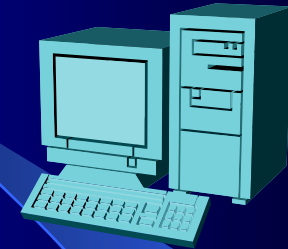
NSFRE/The New School Presentation

Originally presented by
Annalee Van Kleeck on
April 26, 1995
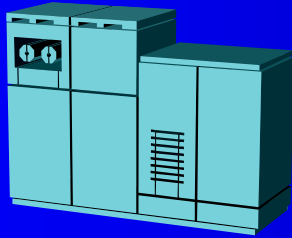
Common Types of Conversions
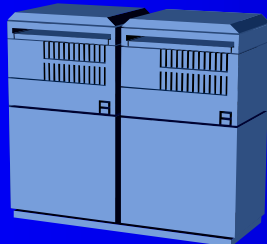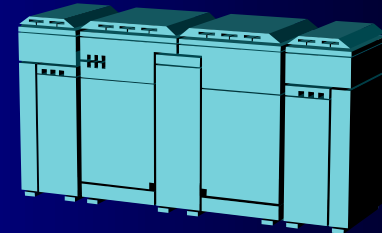
Paper File System → Computer System

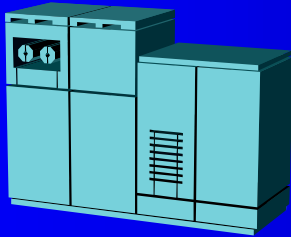In-House System → New In-House System

In-House System → Outside Service Bureau

Practical Examples

NYU Medical Center

In-House System
UFRS

New In-House System
Fundmaster

Planned Parenthood Federation
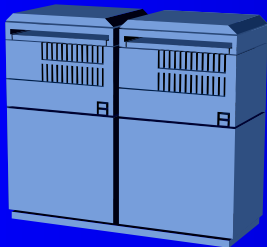
In-House System
CSCI
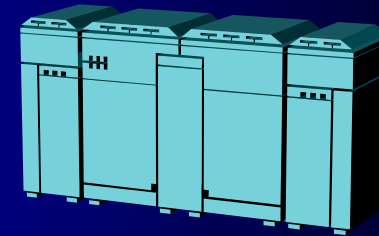
Outside Service Bureau
PIDI

Evolutionary Stages

Post-Conversion

- Establish Database Maintenance Standards
- Clean-up Database
- Train Additional Staff

Conversion

- Convert Data
- Test Data
- Train Staff

Pre-conversion

- Select Fundraising System
- Define Scope of Conversion
- Clean-up/Organize & Map Data

Pre-Conversion

Select Fundraising System

- Create System Requirements Document
- Interview all users of current system
- Analyze & document basic operating procedures
  - Cultivation/Prospecting Efforts
  - Solicitation Efforts
  - Gift Processing & Reporting
  - Acknowledgment Processing

Define Scope of Conversion

- Determine Critical Success Factors
- Identify Responsible Parties & Depts. Involved
- Identify Time Constraints
- Identify Additional Resources Needed

Clean-up/Organize & Map Data

- Map Data/Fields from Old to New System
- Remove Duplicate Records
- Archive/Delete Unnecessary History Records
- Define Commonly Used Codes

Conversion

Convert Data

- Run Conversion programs
  - Name & Address data
  - Transaction Data
  - Demographic/Biographic Data
  - Comment Data
  - Tickler Information

Test Converted Data

- Run in Parallel or Cut Over Live?
- Compare Standard Gift Reports
- Run Basic Operational Programs
- Compare Code Summary Reports

Train "Front-line" Staff

- Setup primary users & security
- Train Primary Users, i.e., gift-processing, donor maintenance staff, etc.
- Create a training manual with institutional codes & scenarios

Post-Conversion

Establish Database Maintenance Standards

- Set up name, address, salutation rules
- Mail, Event Code logic
- Responsible parties – Who Does What

Clean-up Data

- On-Going Process – e.g., combine duplicate names and addresses; re-key information that could not be converted

Train Additional Staff

- Train Secondary Users, i.e., Inquiry access & Light Maintenance Users
- Modify & re-document basic operating procedures

Problems to Expect

- Missed Deadlines

- Lack of Extended Staff Participation

- Trust Issues

- Weariness

Final Recommendations

- Involve "Front-line" users from the VERY Beginning!!!
- Involve reps from all depts. Concerned, e.g. Fundraising; Finance; MIS; Outside Vendors, etc.
- Get Outside Help, i.e., farm out basic operations to free up internal staff to focus on the conversion
- Front-load your efforts to minimize the actual time spent on the "Conversion".