The Perfect Fit:
Finding the Right Fundraising Software

NSFRE Presentation

(Originally presented by Annalee Van Kleeck
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Before You Buy…….

- Is your staff properly trained on your current system?
- Have you thoroughly assessed what is wrong with your current system and documented it?
- Are you on speaking terms with your Finance
& IS staff?
- Do you spend most of your time fixing what has gone wrong in the system after the fact?
- What is the primary problem that you think a new system will solve?

Selection Process in a Nutshell

- Define your business needs first!
- Define your fundraising objectives & critical success factors.
- Create a system requirements document & RFP.
- Send your RFP to prospective vendors.
- Review & evaluate vendors and solutions.
- Select the solution that best fits your needs.
- Choose your hardware last.
- Embark on your conversion……….

Ask Yourself……….

- What type of fundraising organization are you? – hospital, school, museum, social service, etc.
- What is your primary fundraising strategy?

  - membership-driven, face-to-face major donor-driven, events-driven or all of the above.
- Who are your constituents? – alumni, parents, patients, members, etc.
- What types of information do you need to be able to keep about your constituents?

Defining System Requirements & Creating a RFP

- Interview each staff member who will be using the system and/or who will need the information from the system (include Finance, IS, other departments).
- Define the critical business functions that your new system must support.
- Define the critical reports that you must be able to generate from day one.
- Create your wishlist of scenarios.
- Craft your RFP in business terminology and make the vendor respond to how their package can meet your business needs.

Evaluating the Software & the Vendor……..

- Don't just let the vendor show you their bells & whistles – you run the demo, not them!
- Don't take their word for something, make them show you!
- Give them several real-world scenarios before the demo and ask them to show you how to…
- Have them take you through the entire process of creating a record, adding bio-demo data, keying a gift, pledge & pledge payment, generating an acknowledgment and selecting a mailing list.

Evaluating the Software & the Vendor Continued

- Find other organizations similar to yours who also have their product and visit them.
- Check their client list and references.
- Check the company's history – financial stability, how long have they been in business, how many employees, etc.
- Get an evaluation copy of the product if you can, (not just a push-button slide show) & see if you can crash it!
- Find out if they have a users group in your area & talk to them!

Conversion Dos & Don'ts

Dos

- Involve your "front-line" users from the very beginning, especially the selection process!
- Manage the user expectations throughout the entire process.
- Get outside help, e.g., a consultant to manage the conversion or farm out your basic operations so your staff can manage the conversion.

Don'ts

- Don't buy the hardware first and then try to find a package that will fit into it.
- Don't blame your consultant or IS dept. for a poor conversion - look in the mirror first!
- Don't convert for the wrong reasons...you will never be happy with the end results!

Final Thoughts.....

- To maintain a viable, productive database, allocate 75% effort for 25% result.
- Accept your responsibility for the maintenance of your database – don’t abdicate to your IS department, vendor, consultant or Development systems manager.
- Manage a conversion like a Capital Campaign – i.e., don’t announce that you’re “converting” until you’re about to go LIVE, otherwise you will be “in conversion” forever and you will lose credibility and support.
- Treat your IS, Finance and data-entry staff as if they were prospects or donors and you will be rewarded.