

# Dollars & Sense

## ABOUT THE AUTHOR...

### SALLY FUNK

With more than 20 years experience in development, Sally has served in nonprofit organizations large and small, including campus ministries, private schools and missions organizations. Sally served on staff with Campus Crusade for Christ's development office, as well as with International Students, Inc. She most recently was director of development for Evangelical Christian Academy in Colorado Springs. Her broad range of experience includes work with foundations, direct mail, partner program management, and the development of information systems and structures for effective development management. Sally has significant experience with donor and development software and systems and helps organizations evaluate and transition to appropriate development systems solutions. Sally lives in Colorado Springs.

People often ask, "What's the best donor software?" The disappointing answer is, "There's no such thing." The good news is that there is a nice variety of good, functional software out there, with a good possibility of finding one that fits your organization's needs. The problem isn't with the software – it's with the organizations.

## BEFORE YOU PULL THE TRIGGER (Why Careful Aim Helps in Software Selection)

by Sally Funk

Non-profit organizations come in all shapes and sizes, with widely varying objectives, strategies, capabilities and cultures. The key to finding the "best" donor management software for your organization is to know what you need and then find the software that fits those needs.

### What's The Problem?

Not all "software" problems are caused by software. Dysfunctions can also arise from:

- Hardware/network problems – obsolete equipment, wonky networks, incompatible operating system versions, and finicky printers are a few of the underlying problems that can cause all kinds of difficulties.
- Configuration problems – most commercial software is designed to be customized by the end user

(you, the organization). Unfortunately, it is often installed with the generic, one-size-fits-all configuration – simply because the development people and the IT people didn't talk about it beforehand.

- Systems/process problems – this is the people part of the equation. Lack of data standards, lack of training, competing priorities, personnel changes, departmental silos – the list continues to grow.

Of course, sometimes the problem really is the software. These problems fall into two categories: function and fit.

Functional problems usually show up in less expensive or homemade applications. Examples abound: if you pull the same query twice, without changing any data or parameters between pulls, and get different results, that's a function problem. If

you can pull a comma-delimited list from this report, but not that report, that's a function problem.

Fit problems are mismatches between what your organization does and what the software does. They can happen with perfectly functional software. If your organization depends on pledges from events and your software doesn't track pledges effectively, that's a fit problem. If your organization has a lot of different funds, but your software only allows for tracking a few funds (e.g. restricted/unrestricted), that's a fit problem.

## So, What Does The Solution Look Like?

What you need is a tool to define what you need in donor software and then use as a guideline as you look at different software packages. It's called a requirements analysis. A good requirements analysis will end up being several pages long, but it will, in essence, answer these questions:

1. What doesn't work? (What do we need to get rid of, and soon?)
2. What does work? (What functions must be kept?)
3. What do we do? (What are our strategies and capabilities?)
4. Where are we going? (What new things are we adding to the mix in the next 3 – 5 years?)

[Warning: it will take time, effort, and cross-department communication to complete.]

## Doing Your Homework

As part of the requirements analysis/evaluation process, you'll need to do some research and make a number of decisions:

- **Team** – This is not a one person, or even a one department task. You'll need to pull a team together to include the expertise and input from several perspectives: development, IT, data entry, accounting, and leadership, for a start.
- **Infrastructure** – Different software packages are designed to work with specific types of infrastructures. How many records do you have? How many users? Do you work off one computer or on a client server network (or something in between)? How much do you use the Internet as an organization? What levels of security do you need? You get the idea.
- **Budget** – Yes, it is going to cost a significant amount, no matter what your size. And it's not just the software cost. Number of users, number of records, and module costs will affect the bottom line, as will tech support, conversion costs, hardware/operating system upgrades, training, due diligence and data cleanup.
- **References** – Speaking of due diligence, you really do want to check the references of the top contenders. You'll find out a lot from people who actually use the software that the salespeople often don't know (or won't tell you). Visit organizations (preferably like yours) that are using the software you like. Looking at it "live" will answer a host of questions, and bring others to the forefront. If a key function doesn't work the way you think it will, this is the way to find out beforehand.
- **Schedule** – This is also called a scope of work. It answers the questions, "How will we know when



we're done?", "What do we do when?" and "How long will this take?" Changing from one donor software package to another typically takes six to twelve months. It can take longer. Three months is about the shortest possible time, but requires the full-time allocation of several staff (except for very small organizations).

- **Help** – in addition to the software company's conversion assistance, you may need or want help in a number of areas. You may need temporary help to clean up your data before conversion. You may also need assistance in working through your requirements analysis and evaluation process, in developing a configuration/coding strategy or data standards, in technical/hardware set up, in conversion and initial set up (of codes, queries and reports), and in training. Decide where your strengths and weakness are, and bring in help as you need it. It will accelerate your ability to get the most out of your new software.

In short, changing your software is an expensive, time-consuming investment in your organization's infrastructure. The decision will impact your effectiveness for several years. It is worth the time and effort to think it through and take careful aim first.

Need help with your organization's donor software? Not getting the reports that would be most helpful to your decision process? Sally Funk has helped organizations large and small with donor software evaluation, selection and conversion, as well as the creation and management of reporting process that provide the data you really need. If you're interested in learning more, contact Sally or any M/J consultant by visiting our website at [mcconkey-johnston.com](http://mcconkey-johnston.com).