Presents:

Fundraising Software Product Evaluation Checklist

Fulfilling the mission of your organization requires two elements: energetic and committed people and the financial resources to grow and fund your programs and services.

This is why choosing the right fundraising software is so important. This checklist was created to help your nonprofit organization evaluate the many different systems available to help manage your fundraising efforts. The right fundraising system will enable you to maximize the efficiency of your fundraising and grow your organization to better serve your constituents and your cause.

Donor Management

Biographic/demographic data
- ❑ Unlimited number of donor records
- ❑ Unlimited number of fields per record
- ❑ User-defined fields
- ❑ Joint and separate giving records for spouses
- ❑ Track relationships between records
- ❑ Prospect tracking
- ❑ Donor segmentation

Fields & screen flexibility
- ❑ Add fields
- ❑ Remove fields
- ❑ Change fields
- ❑ Reposition fields
- ❑ Secured access to sensitive data
- ❑ Duplicate record checking tools
- ❑ Smart search so users don't have to type full record name
- ❑ Setup of data entry defaults/pick lists
- ❑ Global change of data
- ❑ Multiple donor addresses & salutations
- ❑ Track updates to records
- ❑ Archive records
- ❑ Student/Alumni features

Contact Management

- ❑ Unlimited history and notes
- ❑ Assign due dates to tasks
- ❑ Automatic To-Do/Tickler List
- ❑ Tracks donor for each contact item
- ❑ Automatic logging of e-mails, solicitations and thank-yous

Membership Management

- ❑ Track membership levels, dues, and renewal
- ❑ Membership cards
- ❑ Print/e-mail renewal notices
- ❑ Acknowledgements
- Reports
  - ❑ Membership Analysis
  - ❑ Membership Lists

Gift Management

- ❑ Unlimited gift history
- Unlimited gift coding
  - ❑ Campaigns
  - ❑ Appeals
  - ❑ Fund Designation
- Automatic summary of gifts by
  - ❑ Year
  - Type
    - ❑ Split gifts
    - ❑ Honorariums and memorials
    - ❑ In-kind gifts
    - ❑ Matching gifts
    - ❑ Anonymous gifts
    - ❑ Other _____
  - ❑ User specified criteria
- ❑ Allows assignment of appropriate acknowledgements at entry
- ❑ Receipts
- ❑ Gift batching and audit trails
- ❑ Deposit slips
- ❑ Soft credits
- ❑ In-kind gifts
- ❑ Matching gifts
- ❑ Anonymous gifts
- Giving Analysis Reports
  - ❑ LYBUNT
  - ❑ SYBUNT
  - ❑ Largest
  - ❑ Most Recent
- ❑ Reports

Pledge Processing

- ❑ Track pledges
- ❑ Track unpaid pledge balances
- ❑ Unlimited payment schedules
- ❑ Automated pledge reminders
- ❑ Pledge reminder letters
- Reports
  - ❑ Delinquent pledges
  - ❑ Pledge listings
  - ❑ Cash flow projections
- ❑ Credit card payments
- ❑ ACH payments

Queries and Reports

- ❑ User-friendly query interface
- ❑ One or two-click access to data
  - ❑ Create custom queries on any field
  - ❑ Save and/or sort queries
- Standard, pre-designed development reports
  - ❑ User-determined ranges, summaries, counts and totals
  - ❑ Graphical analysis (internal or exported to other software, e.g., Excel™)
  - ❑ Modify pre-designed standard reports
  - ❑ Save modified reports for future use
  - Large selection of standard development reports
    - ❑ Statistical analysis
    - ❑ Solicitation analysis
    - ❑ Income analysis
    - ❑ Donor Profiles
    - ❑ Campaign analysis
- Custom Report Writer
  - ❑ Built-in or external report writer
  - ❑ Create reports on any field, including user-defined fields
  - ❑ Sort, select and sub-total on any field
  - ❑ Use any formats, fonts, spacing, colors, images, and placement
  - ❑ Print preview
  - ❑ User-friendliness (step by step guide, graphical interface)

Mailings and Communication

- Create solicitations, thank-you letters, other correspondence
  - ❑ Mail merge (personalize correspondence with donor data)
- Maintain history of mailings per donor
  - ❑ Track solicitations, acknowledgments/thank-you letters
  - ❑ Track success of solicitations
- Mass mailings
  - ❑ Ability to select full or subset of donors
  - ❑ Overwrite auto-created addressee/mailing names
  - ❑ Multiple-mailing addresses
  - ❑ Mailing restrictions option (No mail, no solicitations, etc.)
  - Batch processing
    - ❑ Automated thank-you notes
  - ❑ Address labels
  - ❑ Bulk Mail Reports
  - ❑ Exports to mail houses
- E-mails
  - ❑ E-mail personalization
  - ❑ Broadcast or specific email letters, campaigns
  - ❑ HTML formatted
  - ❑ Surveys

Volunteer Management

- ❑ Maintain contact data
- ❑ Track skills and interests
- ❑ Track availability
- ❑ Create/maintain schedules
- ❑ Track actual work time

Grants Management

- ❑ Calendar for grants deadlines
- ❑ Track proposal tasks
- ❑ Research (interface with grants research capabilities)
- ❑ Track grant disbursements
- ❑ Distinguish between requested & actual funding
- ❑ Track grant funding status

Special Events Management

- ❑ Banquets, dinner dances and shows
- ❑ Walk-a-thons, bike-a-thons, telethons
- ❑ Auctions
- ❑ Golf tournaments
- ❑ Sponsored events
- ❑ Track registration and actual attendance
- ❑ Track volunteers assignments
- Payments
  - ❑ Online
  - ❑ Offline
- ❑ Issue/create tickets

Accounting Interface

- ❑ General ledger summaries
- Interface to any accounting application
  - Automated interface
    - ❑ Transaction data
    - ❑ Chart of account allocations

Internet Functionality

- ❑ Web Content Management
- Online Giving
  - ❑ Donations
  - ❑ Event Registration
  - ❑ Product Sales
- ❑ Opt-in Prospect/e-mail collection
- Browser-based version
  - ❑ Security
  - ❑ Links to third party resources (maps, telephone directories, etc.)
  - ❑ ASP or Installed
- Hosted service (ASP)
  - ❑ Subscription payment
  - ❑ Full outsourcing of IT/software maintenance
  - ❑ Data backup
  - ❑ Automatic software enhancement

Data Services

- ❑ Data conversion
- Data enhancement
  - ❑ National Change of Address (NCOA)
- ❑ Prospect Research

Product Support

Support hours: _____
- ❑ Includes product updates
- ❑ Update frequency
- ❑ Phone support
- ❑ Online support tools
- ❑ Size of support department
- ❑ Longevity of support staff
- ❑ Newsletters
- ❑ Other support tools (FAQs, Fast-FAX,…)

Training

- ❑ Recommended training package
- ❑ Costs
- Training methods
  - ❑ Classes (Offered where?)
  - ❑ On-site
  - ❑ Telephone
  - ❑ Web
  - ❑ Self-taught

References and Endorsements

- ❑ Multiple references
- ❑ References for nonprofits similar to yours
- ❑ Recent references
- Endorsements
  - ❑ Well-known associations or organizations

Partnerships

- ❑ Value-added products and/or services
- ❑ Development consultants
- ❑ Information Technology (IT) consultants

sponsored by