

Information and Technology

C *an you recommend a good database?”* It’s amazing how often that question is put to me. It usually takes place over a coffee with the hope that the matter can be discussed, and a recommendation forthcoming, before my white mocha (and it wasn’t even a Venti) has cooled. Oh that it were so easy.

After the securing of a facility and hiring staff, the acquisition of a database is one of the most critical activities an organization can undertake. Why then is it that so many approach on the basis of *“We have \$2,500 – what can we get?”* (headaches and migraines are most likely) or *“Why don’t we get a student to build us one?”*.

This article should help you gain a greater understanding of the issues involved in the selection, procurement and installation of a database.

Managing Information

When it comes to fund development what we are really talking about is managing information (I’ll avoid jumping on the Knowledge Management bandwagon for the moment). Whether you are starting from scratch as a newly formed organization or are well established and are about to launch a major capital campaign, the key elements are the same. In essence you want accurate, timely and pertinent information so that no longer will you hear the phrase *“I think we have \$12,346 in hand and \$3,674 pledged – but we will have to wait until the bank statement comes in, Mary Lou gets back from vacation because she is the only one who knows, has the password, knows how to use the database”* (select any or all of the above).

Where to Start

Remember the Sound of Music? For just a moment, delve into your memories and recall the song *“Let’s start at the very beginning, a very good place to start...”* Well, in terms of information management or databases (we’ll use ‘databases’ for the rest of this article) you should start at the very end rather than the beginning. What is it you want to know? Once you have determined what you want to know and the kind of reports you require, then, and only

then, can you start creating key elements and criteria for the database. As most projects use volunteers to a greater or lesser degree, let's look at volunteer recognition to illustrate the point. Do you want to recognize your volunteers with a pin (or heaven forbid another coffee mug) for completing 50 hours of volunteering or perhaps send them a card on the anniversary of their first volunteer session. If the former, you need to track the actual hours. That means your database must have the means to track each hour (don't forget, somehow the hours have to be entered) and ideally, create a report at the beginning of each month with a highlighted list of volunteers who have achieved that milestone. Obvious though it is, you cannot identify their cumulative time or anniversary if you don't record their hours or start date is often overlooked.

Now let's look at what information you might want to capture for your fund development initiatives. Likely the key elements include:

- Who gave what and when?
- Who gave more than '\$x' and less than '\$y'?
- Who gave last year but not this year?
- Who gave more/less than last time?
- Who promised to give but has not done so this time?
- What commitments were made by staff/volunteers and to whom, and did they do it?
- What are the trends?
- What is the target for this month and are we ahead or behind?
- What reports are due to donors and when?
- Did we initiate a tax receipt and when?
- What campaign did they give to and when?

The above are just a brief sampling of the information that is likely to be the core of any database and while they may be obvious to a seasoned campaigner it is surprising just how many people and organizations fail to identify the critical components, be it because they thought it was common sense (actually a rare commodity) or that all databases "would do that". Only when you know what you want at the end of the process should you start to look at products and services.

Planning to Fail

While your need to get started on the campaign may be urgent, failure to have a solid information management program in place is like building a house without deciding whether you need three bedrooms or four, a bungalow or a three level split, and just as with a house, once you get started it is very expensive and time consuming to change specification once the builder has started. "But surely you can just add a new field for Visa pledges can't you?" - "No, not really" is the likely answer.

If ever the old adage “*Failing to Plan is Planning to Fail*” applies, it is in the development of databases. My belief is that you can spend time at the beginning, planning and creating clear specifications of what you want it to do and then invite suppliers to tender, or you can spend significantly more (in the order of three to five times as much) resolving issues and problems that could have been avoided.

When looking for guidance on what database might best meet your needs you should try and determine what elements are critical. These might include identification of trends, tracking pledges and the automated production of receipts (based on your organizations specific needs) while nice to have features such as the ability to change the screen colours are perhaps not as critical. Once you have your critical features identified it helps you create a short list. My preferred analogy is the purchase of a new car, the enthusiastic “*Look honey, it has air conditioning, power windows, 0% finance and has two real sporty leather seats..*” (no that didn’t happen to me!) to which the response might be “*And where do you think we might put the kids and the dog?*” To continue the analogy of the car, when seeking a product, the GM salesman is unlikely to suggest that Ford have a more suitable product (unless he accepted a position with Ford just before speaking to you). Given the importance of your decision you may want to seek the guidance of an independent consultant. They can help you make your decision, and I stress that it is your decision.

Hints, Tips and Traps

The Iceberg Principle

The purchase of the software is just the tip of the iceberg, don’t overlook (this is not an exhaustive list):

- Training (all need training regardless of how ‘user friendly’ it may be)
- Hardware requirements (desktops and file server)
- Annual support fees (critical)
- Data transfer
- Data backup
- Customization and report creation
- Installation
- Remote access

My Colleague Uses ...

My colleague uses ‘ABC’ and praises/curses it. They may have been just plain lucky or unlucky. More often it is a case of ‘did they do their homework or not’. Get references by all means but be cautious. One product I researched got rave reviews from three organizations and was classed as less than satisfactory (the words were rather more colourful) by two others. Follow up

calls determined that the difference was that the latter two had limited budgets and so opted out of the training. Before you select a product based on remarks from colleagues be sure to be thorough with your research.

Import/Export

Whatever product you select a key element is the ability to import and export information in a standard format and not in a proprietary format that will cost money to convert. One day, be it sooner or later, you will need to get the data out of the database.

Outcomes

Be outcomes driven, and no, we are not talking about 'outcome measures' as identified by our funders, but what you want to get out of the database.

Feature Awe

There is a risk, if you don't do your homework, of being awed by the comprehensive list of features that can be found on the packaging or website of products. Just because it seems to do everything does not mean it will do what your organization needs.

Zip Codes

That's right Zip Codes – I suspect that more than once you have carried out an online transaction of some kind and discovered that the website (usually a database by the way) will not accept your Canadian postal code or province. The database market in Canada is miniscule compared to our neighbours to the South. As a result there are some products that are available on the Canadian market (usually via web based transactions/downloads) that are purely for the US market and have not been modified for use with Canadian postal codes for example.

This article has only just scratched the surface, and should not be seen as exhaustive. However it should have raised your awareness and helped you to understand a little of what is involved. Whether you are the Executive Director tasked with making a decision, or a board member wondering why we haven't got a database yet, you should be better able to make the best decision for your organization and while staff may not rub their hands with glee when they need to use the database they will, at a minimum, see it as an effective, reliable and easy to use tool.

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Guest Writer

Ian has fulfilled leadership roles in the voluntary sector both in Canada and the U.K. for over three decades. His most recent venture was the establishment, in 2000, of Focus IT Solutions Inc. A results oriented company that *'helps non-profit organizations use technology to do what they do ... BETTER'*

Ian was one of the founders of the FRD project when was established in the middle nineties prior to it being transferred to the Centre for Non-Profit Management and a member of the Information Technology Join Table under the federal Voluntary Sector Initiative where he took the lead in 'adding simplicity and common sense'.

Ian's passion is working with smaller organizations and creating those *'Aha ... I didn't know we could do that ...'* moments. When not working in the field of technology, Ian can be found leading board development workshops and training along with sharing his skills and experience as a volunteer.

Ian now operates from the Kahanoff Conference Centre providing support to tenants and conference centre users.

CRM Product Comparison Survey

Prepared by James Carlson

Property of The CentrePoint Advancing Non-Profit Management

Product Name	Overview	Version Reviewed	Costs (\$ CDN)			Requirements		Integration				Capacity	Architecture	Customizable fields	Migration Path	Integration Points	Website
			Setup	Maintenance	Seat	Client	Server	Palm	MS Office	Outlook	Exchange						
ChangePoint	Provides advanced CRM, Engagement Management, Invoicing, Project Management, Support Management, Time and Expense Management, Resource and contractor management tools as a suite of comprehensive Professional Service Organization tools.	n/a	starting at \$50,000 \$100,000 USD	n/a	n/a	Browser Based	n/a	No	No	No	No	Unlimited	Client-Server using MS SQL, Oracle, and DB2 RDBMS	Unlimited	No specific tools for migration.	Oracle, PeopleSoft, SAP, etc	www.compuware.com/solutions/changepoint.asp
eBase	A non-profit company providing open-source software, support costs. The features provided include: Contact, Donation, Pledge, Membership, Event and Mailings Management functionally. Volunteer scheduling and pre-configured reports have weak support. This uses file maker as the database.	3.x	749 USD	0	149 USD	Windows and Mac - FileMaker Pro 5 or 5.5	Windows and Mac - FileMaker Pro Server	No	No	No	No	30,000-50,000 Contacts	Client-server using FilemakerPro as the client and server.	Unlimited		Lotus1-2-3, Excel, Access, and ODBC data sources	www.ebase.org
Convio	An eMarketing tool that features: fundraising, membership, gift, events, web content and affiliates management solutions as a series of modules. Primarily for use with online marketing.	n/a	\$50,000 USD	Approximately \$6000 USD per month	n/a	Windows Based PC	n/a	No	No	Yes	No	Unlimited	ASP Based application	220	One must rebuild the system, and pay for the data to be exported.	data can be exported from ASP site for a fee	http://www.convio.com

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Raiser's Edge	A traditional client/server based CRM tool providing the core features: prospect and donor tracking, gift processing, contact management, and reports and analysis. Optional Modules include: Task Scheduling, Online marketing, Event Management, Volunteer and membership management.		\$29,245 CDN, \$52,029 CDN with web access based on 8-10 users with Volunteer module	\$7400/year based on 8-10 users.	\$7,897 CDN/year based on 10 users	VBA Based application	Oracle or Sybase	Yes thru outlook	Yes	Yes	Yes	Unlimited	Client	Unlimited	No explicit migration path.	Uses VBA and open database solution providing excellent integration with MS Platform, and allows for further parallel development directly with the database.	www.blackbaud.com/products/fundraising/raisersedge.aspx
eTapestry	An online eCRM ASP* providing contact management, donor management, and online marketing tools. This tool is specifically for online marketing, providing limited conventional CRM tool integration points.	n/a	n/a		\$530 USD /mo	Internet based PC with Web-browser	n/a	No	Limited support	No	No	Unlimited	ASP Based application		No explicit migration path.	None. Data is available only with paid migration.	www.etapestry.com
DonorPerfect	A service provided thru a web-browser, providing donor, gift, pledge, contact, special events, and volunteer management.	n/a		0	160-500 USD / Month* depends on the number of contacts	Browser Based	none	Yes	Will CB	Will CB	Will CB	??		70		Will CB	www.donorperfect.com
Act!	A client based application that is tightly integrated with the windows platform offering MS Office and Palm integration. This application stores information in a proprietary data format that is very difficult to manipulate.		\$7,600 CND		\$0	Windows Based PC, with IE 5.5+, Web users must use IE 5.5+	A file server allowing many connections, with a fast network card.	Yes	Yes	Yes	Optional	Version 4.0 supports about 55,000 contacts	Peer-to-Peer bas application using file sharing for data sharing.	Unlimited	Interact provides migration services to SalesLogix	Uses VB Development kit to gain access to data, also provides limited ODBC read-only connectivity.	www.act.com

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SalesLogix	An enterprise level CRM tool providing sales and marketing support, tracking of contacts and competitors, and communication management. This system also has advanced ERP connection tools, allowing instant access to ERP data in various heterogeneous systems.	n/a	\$50,000-\$150,000 CDN	n/a	depends on customizations required	Internet based PC with Web-browser, or Windows based PC running Windows 98/ME/NT/2K/XP	n/a	Yes, optional	Yes	Yes	Optional	Unlimited	Client-Server using MS SQL, Oracle, and DB2 RDBMS.	Unlimited	No explicit migration path.	provides ERP hooks for SAP, PeopleSoft, etc.	www.sagecrmsolutions.com/products/sagesaleslogix
iMIS/Sentient	An end-to-end business management software suite, focused for the non-profit industry. Sentient provides customization and support services for the iMIS product.				I have sent a request for information												www.advsol.com
Access/SQL Server	A custom solution based on a development platform allowing for tight integration with the Windows platform and MS Office back end. MS SQL server is a commercial product, which acts as the server, and MS Access acts as the client which is provided for free.	n/a	\$56 for MS SQL license	0	0	Windows based pc running Access Runtime	Windows Based PC running MS SQL Server	Optional	Optional	Optional	Optional	50-80 clients	Unlimited		n/a	MS SQL Server provides an open data source for scalable applications and future development.	n/a
Athena	A data warehousing tool to aggregate data from heterogeneous systems, usually used for large enterprises. Provides collaboration, interaction, content management, and contact management services thru thick client architecture.	5.4															www.terremark.com/default.aspx

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Maximizer	A High-end solution employing an open database, with full CRM functionality and integration with Outlook. Provides Crystal Reports for advanced reporting requirements. Maximizer Pro handles 1-10 users, Maximizer Pervasive handles 1-50 users and Maximizer Enterprise handles 1-100+ users.	Enterprise 7.5 SQL	\$7892 with web integration / \$3152 without web integration + 20% per annum	Approximately \$7900/year or \$3800/year without web integration.	\$1104 / user	Windows Based PC/IE 5.5 + for web access	Windows Based server running MS SQL Server	Yes, directly with Palm Link	Yes	Yes, email shows up in outlook, the outlook calendar and email are mirrors. The address book is not mirrored.	No	Unlimited	Unlimited	Data is in open format, and can be easily transferred and shared between various programs.	MS SQL Server will be a starting point for any integration, such as Crystal Reports, Access VB, Java, IIS, or Apache.	www.maximizer.com	
ADAPTcrm	A full CRM tool that a non-modular application that supports Marketing, Sales, Service, Fulfillment and Accounting. Available in two flavors, the professional uses an embedded database and the enterprise uses MS SQL Server. The sales representative suggested this tool was a poor fit for the Non-profit sector.	Professional and Enterprise v 3.x	Approximately 50-70K based on requirements.	n/a	n/a	Windows based PC running 2000/NT/XP/98	Windows based PC Server running 2000/NT/XP/98 with MS SQL Server for Enterprise.	No	No	No	No	Unlimited	Unlimited	No explicit upgrade path, professional uses pervasive SQL 2000i, which is easily accessible, while enterprise uses SQL Server which is more accessible and scalable.	MS SQL Server provides an open data source for scalable applications and future development.	www.adaptcrm.com	

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GoldMine Business Contact Manager	A Contact Management tool providing Contact History and tracking, opportunity management, and document management. This program provides tight integration with the Windows platform, and MS Office. This product is available in a series of modules.		Costs of local customizations and setup only.		\$185 USD based on 10 users	Pentium 133 + Windows 98, ME, NT, 2000, or XP	486SX+ 16MB RAM 65MB HD Windows 95/98, 2000 Pro, XP DOS 3.1 file- and record-locking compatible networks	Yes	Yes	Yes	Yes	5-80 clients		Unlimited, thru customizations of the front end and underlying data structures.	No explicit upgrade path, the xml import/export features, and SDK allow for easy access of data to allow for migration.	XML Data import/export provides a fully platform/language/network independent data exchange mechanism	www.goldmine.com
Donor Digital	An online marketing company specializing in Non-profit organizations. They do not offer a specific product; they offer services to customize online eCRM tools.	n/a	n/a		Depends on the level of customization.												
Rainbow	A CRM tool suite specializing in fundraising, developed exclusively for United-Way and not for release to other clients. This product is based on GiftTracker Pro developed by KTS Systems.	n/a	n/a		n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Gift Track / GT Pro	A Vertical tool specializing in Campaign and contributor management, membership, grants and volunteer management. This tool also provides unlimited contact management capabilities. Uses a MS Fox Pro embedded database or a SQL server.		34,000 based on 20 users (more information coming) with annual maintenance costs of \$5290/ye		n/a												www.sagenonprofit.com

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@ease	A Vertical Donor Centric CRM tool providing Donor, volunteer, and contact management features. This tool runs in MS Access, which provides an inexpensive and customizable peer-to-peer application.	1.0.253	\$8,125	%15 of total software cost per annum (Mandatory)	\$350	Windows based PCs	FileServer using node-locking FileSystem m.	No, no directly	Yes	MS Office	Outlook	Exchange	less than 1 million rows				www.batschgroup.com
Giftmaker Pro	A contact centric CRM tool provides donor tracking, membership tracking, volunteer management, grant tracking, gift tracking, contact management, and reporting functionality.													The purchase price of GM Pro will be credited towards Alchemy, with migration of data and customizations.		www.softscout.com/software/Non-Profit/Fundraising-and-Donor-Management/GiftMaker-Pro.html	
Alchemy																www.campaign.com	
the Silent Partner for Windows	A vertical tool providing donor and contact and Mailing List management, as well as pledge tracking and automatic bank with draws.	2.44	\$3,495 CDN for multiuser, \$2,495 CDN for single User	n/a	Windows 95+, 32 MB RAM and disk space depending on number of records	Windows compatible file server supporting node level locking.	No	No	No	No		999,999 contacts	n/a	No specified migration path.	None.	www.silentpartner.ca	
EZ-Fund	A donor management tool specifically designed to allow Canadian Fund Raisers to manage their donor database and effectively track their pledges and donations. Uses Crystal Reports for ad hoc reporting.		\$1495 CND	\$0	Pentium 133+ 16 MB RAM, windows 95/98/ME/NT 60 MB Disk space							unlimited		0		www.fundez.com	

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Income Manager 2000	An MS Access based Donor Management Tool providing income, event, volunteer management, as well as ad hoc reports	4.1	\$1395 USD		\$50 USD	Windows 95/98/NT	sent email for more details										Closed MS Access mdb modules provide little accessibility to data.
Millennium Browser	A Thin-client and thick-client based application providing fund-raising functionality.	Email sent!															www.accountingsoftware411.com/SoftwareDirectory/softwareview.aspx?sid=Mill509F83s
Qmember	A marketing and management tool specifically designed for non-profit organizations, providing Campaign, donor, and volunteer management functions, as-well-as special event management, membership management and special event fund raising.	more information requested															www.qmember.org
Charity.ca	The largest internet fundraising solutions provider. Internet solutions include eDonations, eTaxReceipts, eEvents, eNewsLetters, eCampagins, and website development and hosting.	n/a	\$12,000+		+ CDN based on requirements												

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PledgeMaker	An Oracle based thick- and thin-client application providing gift, contact, biographical, relationship and inventory management. Optional modules include Allumini Tracking, Credit Card Processing, eDonation, eRegistration, and events, membership, project, and volunteer management. They also provide database ASP services.	more information requested											Client-Server using Oracle Database.				www.pledgemaker.com

* ASP - Application Service Provider: An online service that provides an application.

