# Six Steps for Evaluating Fundraising Software

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Fundraising has long been recognized as a practice combining art and science, and that science now heavily relies upon technology. As your organization and staff grow and evolve, your need for technology may change as well. The following suggestions will help you identify and define your needs, as well as the process for looking at and evaluating new fundraising software.

## 1. Evaluate your motivation for choosing new fundraising software, and document your needs.

- What is your motivation? Are you using your current system to its maximum capabilities? Does it have the breadth and depth you need to support your upcoming campaign?
- What kind of reports do you need to utilize and provide to other audiences such as your president, foundation and college trustees? Will your software choice provide multiple types of reporting capabilities, or will you need to purchase an additional tool?
- Your requirements should consist of functionality that is considered absolutely necessary for you to do your jobs effectively, as well as identifying the "nice-to-have" features (also known as bells and whistles) you are looking for.
- To select the software with the best long-term fit for you, consider your strategic plans for the Development Office and/or Foundation. For example, currently you may not have a formalized deferred/planned giving program, but you expect to within five years. Will your software choice be able to meet that need down the road?

## 2. Realistically identify the following five key pieces of information:

- When you will need this new software up and running? The answer "within 90 days" versus "within the next 12 months" will make a dramatic difference in both your options and potential expense.
- Who will be supporting your use of the software- the campus IT staff or an employee in your own office? Answering this question not only helps identify who should be involved in the selection process, but whether or not you need to adjust staff responsibilities and expectations post-implementation.
- How many people will be using this software? How many people will need information from the system but not necessarily need to "use" the system? The number of users may make a difference in the cost of your software as well as the number of people you may need to consider for training services.
- Do you currently have the technology infrastructure to support your new software choice, or will the software necessitate purchasing new computers, servers, or other equipment or hardware? Dialoging with your IT department in advance of your software search process can assist in understanding the 'bigger picture' as well as planning an appropriate budget. And speaking of which…
- What budget do you have to work with? Do you have it in place, or is it dependent on receiving a grant or gift from a donor? Having the funding worked out ahead of time enables you to have the most timely purchase and implementation process possible.

## 3. Research multiple fundraising system vendors, informally and formally.

- Informal research can be done by looking at product information online, asking questions on listservs, and networking with colleagues at other institutions to learn what products they use and their satisfaction with those products.
- Formal research includes submitting a Request for Information (RFI) or Request for Proposal (RFP) to multiple vendors. These requests should inquire about functionality, typical implementation timelines and proposed costs as well. Vendors who would like your business will then respond with the requested information.

## 4. Compare proposal responses, schedule on-campus demonstrations with each of the vendors whose products you would like to see, and conduct additional research or due diligence.

- The demonstration process can be tedious but is a critical step in selecting a product that truly fits your institution and office and meets your needs.
- Many people think it is best to schedule demos back-to-back for ease of comparison. The reality is that participants get "demo'd out" and after the second vendor, all the vendors and products becomes "a blur". Schedule your demos so there is one vendor each week, and provide participants a check list so they may evaluate each vendor by the same criteria.
- Additional research may be done by conducting on-campus site visits to institutions that use a product you are considering purchasing. This enables you to see the product in action (not just in a demo) and get feedback from the users themselves about what they like and dislike about the product.

## 5. Dialogue with the vendor for specific information about their implementation and support. Ask the following:

- How long will a typical conversion and implementation take?
- What staff resources will be necessary for a successful implementation? Will you need to backfill positions temporarily or dual-enter data for a period of time, and if so, how long?
- What kind of training support is provided by the vendor during implementation?
- What kind of support is provided by the vendor after implementation is complete?
- The answers to these questions may assist you in narrowing down the vendor selection, and will help set good expectations for your staff, the institution and external stakeholders.

## 6. Cross-reference everything you have learned and put it on a selection evaluation grid.

- Tally up the evaluation criteria check lists from people who participated in the demonstrations.
- Use weights or scores to identify your most important criteria.
- Be sure to include subjective (but unemotional) feedback, including comments from other institutions using the vendor's products, the staff who would use it most, the IT/staff who will support it.

By following these six steps, you will create a methodical way of selecting fundraising software that not only meets your current needs, but should be able to grow with you as well. For more information about this article and how to select a vendor, please contact Karli Grant at kag@datatel.com, or 703.624.7332.

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