

Our Data, Ourselves

Money for Our Movements
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Agenda

- Intros
- Your goals
- Why does this matter?
- When to change
- Overview of the full selection process
- Discussion/Therapy

Your Goals

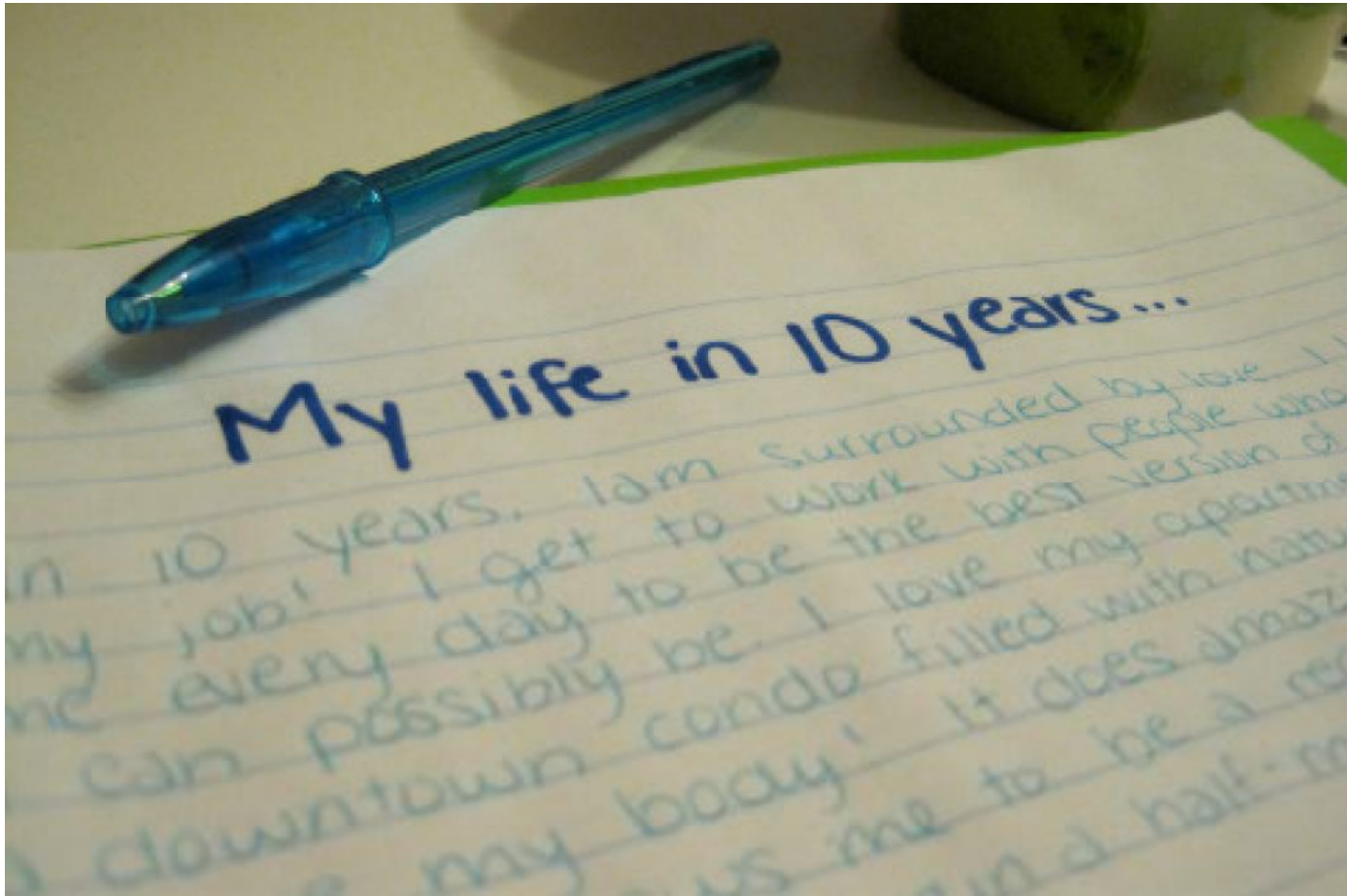


Image: [lululemon athletica](https://www.lululemonathletica.com/)

What Should You Expect?

Your donor database should help you:

- Track your activities and assets (donations, events, solicitations).
- Monitor and forecast performance.
- Focus your efforts and work strategically.
- Report to your board, donors, funders, public.
- Better connect with your constituents.
- Remember: Databases Don't Raise Money, People and Good Business Processes Do!

Why Does This Matter?

- *“After people, data is your most important resource.”* — John Kenyon.
- A database is your institutional memory.
 - It allows the organization to survive staff turnover.
- A good database helps you work smarter.

When to Change?

- Routine reports are painful to produce.
- Critical information is on paper.
- Can't track metrics or progress.
- Data scattered in spreadsheets.
- Data can't be integrated across systems.
 - Can't get 360 degree view of relationships,
- Data is in fundraisers' heads.
- Your organization is changing.
- Bad vendor or wrong choice last time.

Principles

- There is no perfect database.
- First, decide what you're looking for.
- Buy-in is critical. Stakeholders must be involved in the decision.
- Structure software demos so you can compare “apples to apples.”
- Make sure you understand all the costs.
- Trust but verify.

Buying A Database

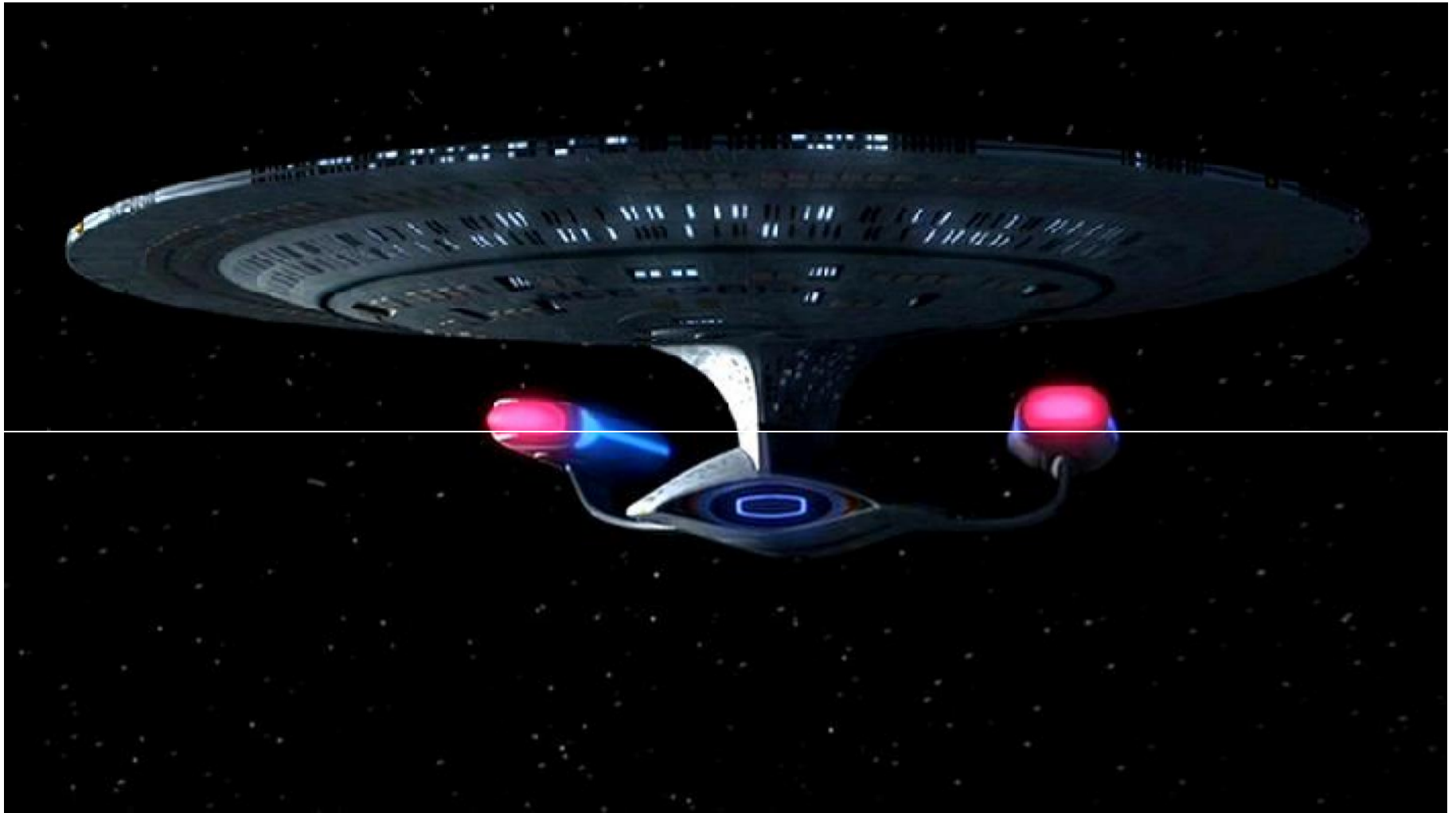
- 1) Convene the right team.
- 2) Specify your needs and priorities.
- 3) Identify a pool of potential vendors.
 - RFP/RFI
- 4) Test vendors against your needs.
 - Scripted demos
 - Hand-on testing
 - Reference checks
 - Site visits
- 5) Get a cost proposals.
- 6) Plan for the future.

Am I Normal?



Image: www.livingandlovinginla.com

What You Want



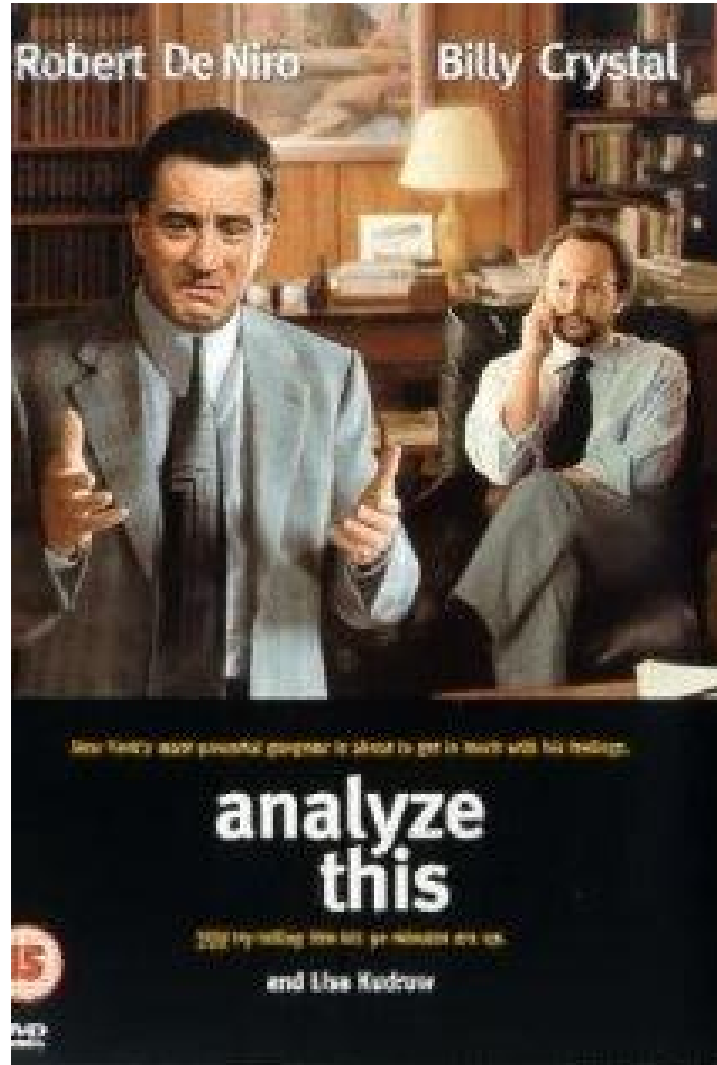
Copyright Paramount Pictures

What You're Starting With



Image: [gilhooly studio](#)

Step 1: Know Yourself



Copyright: Village
Roadshow Pictures

Step 2: Assemble Your Team



Copyright Marvel Studios

Step 3: Document Your Requirements



Copyright Warner Brothers

What do you want to see?



Copyright Warner Brothers

Step 4: Know Your Limitations



Image: [inju](#)

Step 5: Compare Apples to Apples



Image: [Castaway in Scotland](#)

Vs.



Image: [Brooks Elliott](#)

Stay on Target



Image: [Jim in Times Square](#)

Step 6: Growing Up



Image: awwwpuppyawww.com

Where We've Been

- Why does this matter?
- When to change
- Overview of the selection process
- Discussion of your situations

- So, what's your next step?

Resources

Heller, Keith: *Do You Need New Donor Management Software?*

www.idealware.org/articles/new_dm_software.php

Idealware: *Consumers Guide to Low Cost Donor Management Systems*

idealware.org/reports/consumers-guide-low-cost-donor-management-systems

Murrain, Michelle: *The True Costs of Free and Low-Cost Software*

www.idealware.org/articles/true-costs-free-and-low-cost-software

Weiner, Robert : *Finding the Perfect Fundraising Database in an Imperfect World*

www.rlweiner.com/grf/grf_finding_perfect_database.pdf

Weiner, Robert: *Ten Common Mistakes in Selecting Donor Databases*

idealware.org/articles/ten_common_mistakes_in_selecting_donor_databases.php

Wild Apricot: *Membership Database Selection* (part 1 of 3)

www.wildapricot.com/blogs/newsblog/archive/2011/03/16/membership-database-selection-part-1-2D00-Defining-Your-Needs.aspx

More resources are posted at www.rlweiner.com/resources.html and

www.teamheller.com/resources

More Questions?

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