Fund Development Assessment Survey

Phase One of The Developing Development Program

Executive Service Corps of Southern California

Jeffrey R. Wilcox, CFRE

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Revised 2/1/07
Step Four:
Essential Fundraising Tools

There are four essential tools that every nonprofit organization must put to work and manage on a daily basis if significant sums of charitable contributions are to be raised. These four tools are:

- A strategic plan or business plan that outlines quantified business goals and outcome measurements for the services you provide to the community;
- A fund development plan that identifies key donor groups and outlines specific strategies and timelines for researching, prospecting, cultivating, soliciting and recognizing donors;
- A Case for Giving that outlines the important work of the organization, calculates the amounts needed to be raised, assures accountability, demonstrates impact, and provides an emotional appeal for supporting the mission statement; and
- A comprehensive donor database and reporting system that records essential information about current, past and potential donors; accurately tracks contributions by giving program; monitors implementation of the strategies contained in the fund development plan; and assures that gift recording policies and practices have been followed.

It is extremely important to note that without these essential tools of fundraising, the fundraising potential of the organization will not be realized even with the most creative and innovative fundraising strategies.

The Strategic Plan or Annual Business Plan

A strategic plan describes the future direction for an organization over a multi-year period by examining the environment, setting program objectives, establishing quantified goals and impact measures, and outlining processes and responsibilities for completion. An annual business plan outlines business goals and strategies for a single year and is supported by an annual operating budget.

1. Does your organization have a strategic plan?
   Does your organization have an annual business plan?

   YES  NO

   YES  NO

   If both answers are no, please continue to the next section.

1-A. Does the plan(s) guide the decision-making processes?
1-B. Does the plan(s) lay out specific strategies to be completed and by when?
1-C. Does the plan(s) contain a financial projection of what is needed to achieve the goals outlined in the plan?
1-D. Is the plan(s) regularly up-dated?
1-E. Is the plan(s) used for fundraising purposes?
1-F. Is your organization having a strategic planning process during 2004?
1-G. Does the plan(s) include your fund development goal and outline strategies to achieve those goals?

Additional Comments about your Fund Development Plan or Planning Efforts:
Fund Development Plan

The fund development plan establishes a fundraising goal using current need and funding analysis and identifies specific strategies to achieve the goal from targeted constituencies with timelines, responsibilities, costs and benchmarks.

2. Does your organization have a development plan?  
   ___ YES  ___ NO

   *If no, please continue to the next section.*

2-A. Does the plan guide the management of the organization?  
   ___ YES  ___ NO

2-B. Does the plan lay out specific strategies to be completed and by when?  
   ___ YES  ___ NO

2-C. Are the Board and management regularly up-dated on the plan's implementation?  
   ___ YES  ___ NO

2-D. Does the plan contain a financial projection of what is needed to achieve the goals outlined in the plan?  
   ___ YES  ___ NO

2-E. Is the plan regularly revised?  
   ___ YES  ___ NO

2-F. Does the organization provide fundraising training for Board Members and staff?  
   ___ YES  ___ NO

2-G. Is the plan embraced by the organization’s Board and staff?  
   ___ YES  ___ NO

Additional Comments about your Fund Development Plan or Planning Efforts:

________________________________________________________________________
________________________________________________________________________

Case for Giving

A Case for Giving is a printed and distributed document that presents the purposes and programs of the organization, highlights growth areas and their costs, outlines financial and fundraising needs, assures accountability, and contains an “ask” to contribute.

3. Does the organization have a Case for Giving?  
   ___ YES  ___ NO

   *If no, please continue to the next section.*

3-A. Does the case guide your fundraising and communications messages?  
   ___ YES  ___ NO

3-B. Is the case regularly distributed?  
   ___ YES  ___ NO

3-C. Does the case lay out specific financial needs and how charitable gifts will help meet the needs?  
   ___ YES  ___ NO

3-D. Is the case regularly up-dated?  
   ___ YES  ___ NO

3-E. Is the organization planning a strategic planning process during 2006?  
   ___ YES  ___ NO

3-F. Is the Case For Giving used in orientation and training?  
   ___ YES  ___ NO

Additional comments about your Case for Giving:

________________________________________________________________________
________________________________________________________________________
## Donor Database and Development Reporting System

The Donor Database and Development Reporting System is the centralized process used to accurately record all gifts, maintain current, lapsed and prospective donor information, identify overall contribution levels to support goals, analyze giving methods, and track compliance with policies and procedures.

4. Does your organization have a computerized donor database?  

<table>
<thead>
<tr>
<th>YES</th>
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   *If no, please continue to the next section.*

4-A. What software package do you use for your donor database?  

<table>
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<th>YES</th>
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4-B. Do you have approved gift recording policies and procedures?  

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<th>YES</th>
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4-C. How many years do you have accurate records for giving?  

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<th>YES</th>
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4-D. Do you publish reports for the Board and management from the database that tracks key giving information?  

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4-E. Do you record information about prospects (people who are potential donors to your organization) in the system?  

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4-F. Do you use the database as part of your organization’s overall mailing and distribution list?  

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Additional Comments about your Donor Database & Development Reporting System:

________________________________________________________________________

________________________________________________________________________

## An Annual Operating Budget

An annual operating budget establishes benchmarks for measuring organizational performances against your plans and financial targets.

5. Does the organization prepare an annual operating budget?  

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   *If no, please continue to the next section.*

5-A. Does the budget guide the management of the organization?  

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<th>YES</th>
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5-B. Does the budget include specific strategies to achieve financial targets with deadlines?  

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5-C. Does the organization use a zero-based budgeting method?  

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<th>YES</th>
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5-D. Is the budget revised during the year?  

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<th>YES</th>
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5-E. Are the amounts budgeted for contributions income based on a financial calculation of the deficit between revenues and expenses?  

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<thead>
<tr>
<th>YES</th>
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5-F. Is the current budgeted contributions income realistic for the current budget period?  

<table>
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<tr>
<th>YES</th>
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CREATING THE GIVING CASE
An Outline For Contents

HISTORY
HONORS & DISTINCTIONS
FACILITIES
FEATURED PROGRAMS
HOW OUR ORGANIZATION IS DIFFERENT
ABOUT THE COMMUNITY WE SERVE
ABOUT THE NEEDS THAT WE MEET
OUR STRATEGIC VISION AS OUTLINED IN THE STRATEGIC PLAN
WHAT IT WILL COST TO ACHIEVE OUR STRATEGIC PLAN
WHY SOMEONE SHOULD SUPPORT US
TWO EXAMPLES OF HOW PEOPLE HAVE BEEN HELPED ...
BASIC FINANCIAL INFORMATION
CURRENT FUNDING NEEDS EXPLAINED
WHAT $10, $25, AND $100 PER MONTH COULD DO FOR YOU
ABOUT OUR LEADERSHIP
GIVING FORM
Camp Fire USA Long Beach Area Council
A Case for Giving

Executive Summary

Camp Fire is all about meeting the needs of today’s youth and families in the most comprehensive and caring ways. Camp Fire offers 14 separate programs in collaboration with 36 other organizations, including public schools, churches, low-income apartment complexes, hospitals, and social service agencies. Always responsive to social change, Camp Fire’s programs are flexible by design so the needs of the entire community can be met. The organization continues to base all programs on the development of essential life skills, critical thinking, decision-making, giving and leadership development. Each program has specific goals with outcome-based measurements and evaluations. Having served over 10,000 youth from ages four to 21 in 2001, Camp Fire is a critical investment in the lives of children and families in the Long Beach area.

Camp Fire is one of the longest-standing youth development agencies in the greater Long Beach area. The organization provides small groups and clubs, camping, leadership training, after-school literacy, outreach programs and community service opportunities for our youth. Camp Fire’s goal is to equip young people with the life skills they need to become effective decision makers and healthy adults in all environments. This is reflected in our mission statement: “Camp Fire USA, Long Beach Area Council, builds caring, confident youth and future leaders.”

So that we may better serve our community, our Camp Fire Council currently needs to raise nearly $1.0 million in 2003 to meet the current needs of our youth and families, maintain our current level of quality services, and to grow programs aimed at facility remodeling, ecology, and youth leadership.

History

Camp Fire USA Long Beach Area Council was established in 1923, and then chartered in 1925 as an extension of the National Camp Fire program that began in 1910. There have been eight office locations over its 80-year history. It has been at its current location since 1969. A new 25-year lease was negotiated with the city of Long Beach in 2001 to assure continued future services and programs to our community. Originally developed for girls, Camp Fire invited boys to join in 1975, and the name changed from Camp Fire Girls to Camp Fire Boys and Girls. Today 46% of its national members are boys. In 2001, the name became Camp Fire USA to emphasize the inclusion of family as well as youth in its programs. Along with the new name came the organization’s new theme line: “Today’s Kids. Tomorrow’s Leaders.”

Camp Fire in Top 100

Camp Fire USA was named one of America’s 100 Best Charities in the December 2001 issue of Worth magazine. According to Worth, a charity is selected to the top 100 list only after convincing the magazine of its organizational mission and the success toward achieving it. To produce the list, Worth examined over three years of tax returns, annual reports and statements of individual charities.

Facilities

Since 1969, Camp Fire USA Long Beach Area Council has been situated on a 5-acre in-town day camp called Camp Shiwaka. This traditional day camp, located just north of Eldorado Park, is the cornerstone of the Camp Fire program. Additionally, it provides an opportunity for boys and girls who are not members of Camp Fire to experience day camping. Camp Fire also uses a secondary camp, Camp Wintaka; a 200-acre site nestled in the San Bernardino National Forest, for a weeklong resident camp once each summer.
At Camp Shiwaka groups set up responsibility charts and campsites, cook over the fire, sing around the flagpole, practice and advance in a variety of outdoor skills, and sleep under the stars. It's truly an inspiring image to see 100+ youth in small groups of 8-12 woven throughout the multitude of trees - talking, laughing, planning, working, and eating together. Splashes of color appear as bags of freshly washed utensils and plates hang from ropes at each campsite, ready for the next meal. Many colorful hats and costumes illuminate the woodsy atmosphere as several groups plan and perform skits. Art projects and charts also catch the eye. There is a wonderful aura of activity and harmony everywhere.

**Featured Programs**

- **Summer Camps:**
  - Camp Shiwaka: a traditional day camp with some sleepovers
  - Camp Wintaka: a weekend residential camp in the San Bernardino mountains
  - Camp Summersault: for children with cancer and their siblings
  - Family Campouts and Teen Caravans
- **Youth Leadership Training:** prepares youth to take on leadership roles in many areas of service.
- **“Challenge by Choice” Ropes Course:** utilizes both low and high rope elements to encourage group communication, teamwork, and personal challenge.
- **Absolutely Incredible Kid Day:** personal letters from parents, teachers, and community leaders let kids know how special they are.
- **Y.E.S. - Youth Empowerment Strategies:** an 8-week course designed to help teens set personal goals, evaluate choices, and understand consequences.
- **Teen Moms “Taking Care of Business”:** moms and their kids learn about healthy living habits, including cooking techniques and recipes.

Other programs include small groups and clubs by grade levels, Reading Adventure Clubs, Downtown Story Hour, After School Enrichment and Homework Help, Parent Boosters, community workshops, and numerous community service projects. All youth in the Camp Fire traditional programs have opportunities to earn awards and recognition through a progression of skill-building activities and services. Award categories include Business, Citizenship, Science, and Outdoor Skills, providing a well-rounded curriculum.

**How Camp Fire Is Different**

*Camp Fire is an excitingly different youth development organization that:*

1. Serves boys and girls in a whole-family environment, whatever the family’s structure.
2. Focuses on the development of the whole person.
3. Uses outcome-based and skill-building programs.
4. Is inclusive, welcoming all children, youth, and adults regardless of race, religion, socioeconomic status, disability, sexual orientation and all other aspects of individual diversity.
5. Takes families as they are and teaches self-reliance, safety, health, leadership, cooperation and responsibility.
6. Emphasizes spirituality from within.
7. Allows parents to consolidate schedules for their sons and daughters together.
8. Works in collaboration with 36 other charitable organizations in the area.
9. Offers 14 separate programs in schools, churches, libraries, low-income apartment complexes, and hospitals.
10. Provides programs in English and Spanish.
11. Provides ongoing support and training to teen and adult volunteer leaders.
12. Uses nationally structured curricula, which is tailored to each group’s needs.

**The Community We Serve**

10,100 youth participated in Camp Fire USA Long Beach Area Council programs during 2001. Nearly 70% of the clients Camp Fire serves are considered low income, with 30% coming from families making less than $18,000 a year. Most of the students served qualify for free and reduced lunch programs.
Youth from Long Beach, Lakewood, Bellflower, Paramount, South Bay, Hawaiian Gardens, Artsia, Cerritos, Norwalk, Downey and other surrounding areas access Camp Fire’s programs. The target neighborhoods are in zip codes 90802, 90804, 90805, 90806, and 90813. The following statistics provided by Long Beach Unified School District represent the challenges young people are facing in these communities:

- 29% of families are under the Federal Poverty Level
- 50% of the children do not speak English when entering school
- Stanford 9 Reading Scores are among the lowest in Los Angeles County
- Only 28% of third graders are reading at grade level
- Over 40% of parents did not graduate from high school

**Why Should You Support Camp Fire?**

1. **We are there at times when kids need us most.**
   Studies by the FBI and youth-advocacy groups have found that the peak hours for juvenile crime and victimization are from 2 to 8 pm. They also found that students who spend one to four hours per week in supervised extra-curricular activities are:
   - Half as likely to use drugs
   - One-third less likely to become teen parents

   A study, entitled *Fight Crime: Invest in Kids California, 2002*, reiterates that in California’s largest cities, the prime time for kids to become victims of crime and car crashes, or engage in sex and drugs is between 2 and 6 pm on school days. *Reduced Time*, a study of 12 high-risk California communities, states that among participants in after-school programs from 2 to 6 pm:
   - Vandalism and theft dropped by two thirds
   - Acts of violence, weapon possession, and arrests were reduced by at least one half

2. **We are where kids need us most.**
   Young people need a safety zone after school and summer “free time.” Camp Fire provides innovative, flexible, supervised programs that reach out to the community and facilitate participation. Camp Fire offers 14 separate programs in partnership with 36 schools, organizations, and agencies, including apartment complexes.

3. **We provide what kids need.**
   Camp Fire programs give youth an opportunity to make new friends, build relationships with caring mentors and adults, learn respect for people different than themselves, and develop better conflict resolution and social skills. It is important that these programs continue to be provided at regular intervals over consistent time periods, and always with the following in mind: “Today’s Kids. Tomorrow’s Leaders.”

4. **We have been doing it effectively for a long time.**
   Camp Fire spans a period of 80 years of service to Long Beach area youth and families and was chosen as one of America’s 100 Best Charities.

**Success Stories**

**Freddy’s Story: Camping Changes Lives – It Can Also Save Lives**

Freddy is a young teen growing up in a tough neighborhood. One day Freddy was involved in a teasing incident with a younger boy. The boy’s older brothers and friends came looking for Freddy with baseball bats. Freddy’s mom was able to keep him inside, but had to call the police to get the young men to leave.

Camp Fire staff arrived the next morning to take Freddy and the rest of the group on a weekend camping trip. On the trip, the staff talked about the incident with Freddy and his friends to help him find a positive way to resolve the issue. The trip also provided a cooling down period for all parties involved. When Freddy returned home, he apologized to the boy he had teased and also talked to the boy’s older brothers. With Camp Fire involvement, the entire incident was resolved without violence.
Laura’s Story: Youth Leadership Program is Working One Teen at a Time

Laura first came to Camp Fire to get out of her house. Her dad left after losing all of his money in the stock market. He now drinks heavily and lives in a camper. Laura and her mother live in a middle-class neighborhood. Her mom is struggling to keep the house and they may lose it. Mom can’t remember things very well, so Laura often has to take on the role of parent.

When Laura joined Camp Fire two years ago, she was quiet and withdrawn. Today there is a big change in Laura due to her involvement in the teen leadership program. She now feels like she fits in, has a confident attitude, and relates well to others. Due to Laura’s financial situation, Camp Fire has paid for her training, provided transportation, and purchased the required leadership clothing. Laura is yet another example of Camp Fire supporting “Today’s Kids. Tomorrow’s Leaders.”

Financial Information

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<tr>
<th>Revenue</th>
<th>Expenses</th>
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</thead>
<tbody>
<tr>
<td>Contributions</td>
<td>Program Services</td>
</tr>
<tr>
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<td>$494,679</td>
</tr>
<tr>
<td>Government Grants</td>
<td>Administration</td>
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<tr>
<td>0</td>
<td>71,748</td>
</tr>
<tr>
<td>Program Services</td>
<td>Other</td>
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<tr>
<td>247,713</td>
<td>15,413</td>
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<tr>
<td>Investments</td>
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<tr>
<td>Sales</td>
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<tr>
<td>Other</td>
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<td>4,932</td>
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</tr>
<tr>
<td>Total Revenue</td>
<td>Total Expenses</td>
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<tr>
<td>$593,773</td>
<td>$581,840</td>
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Current Needs

1. **Facility Remodeling and Restoration:** $200,000
   The Camp Fire lodge is quite old and needs necessary remodeling and restoration.

2. **Ecological Center Creation:** $200,000
   Youth will learn “environmental stewardship” through a new facility with classroom space, overnight accommodations, native trees and plants, and a kiln for art activities.

3. **Youth Leadership Program Expansion:** $93,000
   Camp Fire USA has been asked to further expand the program in the community. To accomplish this, staff must be added to facilitate the training and development.

4. **“Challenge by Choice” Rope Course Improvement:** $6,000
   To improve this highly successful program, new climbing and belaying apparatuses need to be added, including a two-line bridge, a 12-foot wall deck, and a 35-foot ladder.

So that we may better serve our community, our Camp Fire Council currently needs to raise nearly $1.0 million in 2003 to meet the current needs of our youth and families, maintain our current level of quality services, and to grow programs aimed at facility remodeling, ecology, and youth leadership.

We Invite Your Participation

- A gift of $10 per month provides:
  - Seven annual memberships ($18 each)
  - One child’s curriculum in the traditional small group program
  - Nutritional snacks for one group for one week
• A gift of $25 per month provides:
  - A child’s scholarship for materials and/or uniforms
  - Transportation for Camp Fire to take programs into the community
  - Materials for leaders to teach a series of monthly science lessons

• A leadership gift of $100 per month helps provide:
  - New books to improve children’s reading skills
  - Support for a monthly newsletter of information, training and family activities
  - Part-time staff for youth leadership training to help kids become community leaders

Our Leadership

Shirlee Jackert, Executive Director

Camp Fire is operating in the context of rapid social changes fulfilling our mission to build caring, confident youth and future leaders. We continue to expand all of our programs and activities in the greater Long Beach area to the best of our ability. We need more funds, however, in order to serve more youth and families than ever before. To realize our mission and deliver on our commitment of being the “best choice” for children, youth and families, we must continually evolve and improve.

Harold Omel, President of the Board

Our board, past and present, has worked hard behind the scenes to assure that our organization has clearly defined goals and the resources to meet them. Our leaders who give their time and resources serve as constant role models to young people in small groups and clubs, community outreach, and with special events. We have an excellent, dedicated professional staff to support and encourage our youth and volunteers who make our programs possible. Our young people see many fine examples of leadership at all levels and have opportunities to become leaders themselves. Leadership is a major theme in Camp Fire and this focus empowers today’s kids to be tomorrow’s leaders.

E. Dan Allen  Michael DuRee  Florence Dodge  E. Dan Allen
Liz Minor  T.M. Mulhalland  Karen Nishkian  Liz Minor
Martin Leyba  Harold Omel  Suzanne Schoij  Martin Leyba
Michael Sier  Chris Steinhauser  Robert Ungs  T.M. Mulhalland
Debbie White  Robert Ungs  Robert Ungs  Steven E. Wirth

CAMP FIRE USA - Long Beach Area Council
7070 E. Carson Street, Long Beach, CA 90808
Phone: (562) 421-2725
Donor Records Maintenance and Management

“Sources, Vendors and Usage”

Introduction: Internal donor records maintenance and management should be designed to include all operational data needed for accurate donor gift histories and communications purposes. Maintenance of this “master mail list” representing all house files will require identification codes to segregate lists for specific usage. For example, prior client lists can be identified for routine communications (newsletters, satisfaction surveys, media releases, etc.) prior to and after gift solicitation, while lists of current and past donor lists are coded for scheduled direct solicitation contacts. Maintenance of all house files should be centralized with codes applied to guide their access and uses. Centralized database management also will help ensure sufficient contact with designated audiences according to overall marketing, communications and fundraising design.

Sources: Most donor records management software products are designed to retain current gift history data for re-solicitation purposes, whether by mail, telephone, fax, email, or in face-to-face contact. These same products record giving history, methods and timing of past solicitations, purposes or uses of funds as directed by donors, and more. These records also retain other personal preferences such as how, when and by whom to contact them, their interest areas linked to ongoing nonprofit programs and services, and any peer relationships useful to personalize these communications (e.g. they prefer to hear from the CEO/ED or which board member or staff professional is assigned to contact them, etc.).

Vendors: Several fundraising software products are available. The leading vendor is Blackbaud and its Raisers Edge, a fully comprehensive system for larger databases beginning at 20,000 records that can include compatible accounting records matched to the organizations fiscal system. Other vendors provide several of the same services, or a selection of them, depending on fund development program size and budget, and come with more or less training and troubleshooting services. However, not all fundraising support products interface easily with the organization’s mainframe computer programs used for financial records, marketing and public relations communications programs, and Internet service and Web site operations.

Vendor Contacts for Fundraising Donor Records Management Systems:


Usage: Friend raising and relationship building are the driving principles in successful fundraising. Building and maintaining such relationships requires highly selective, personalized communications that utilize every available avenue for contact throughout the year. Strategic communications plans are matched with required contacts with donor benefits and privileges so that invitations to give are coordinated closely with obligatory distribution of fiscal performance details along with program and service activities and outcomes.
Executive Service Corps of Southern California

Donor Management Software Information

Information Sources:
- Mission/Research
  - 313 West Liberty Street, Suite 124
  - Lancaster, PA 17603 ((888) 323-8766)
- Techsoup
  - http://www.techsoup.org/howto/articlepage.cfm?ArticleID=602
- Interview with Darla Dunlap, Development Director for Switzer Center School and Clinical Services (Contact: Tel. 310-328-3611)

Purpose: To aid in the management of donor relationships by organizing, storing and reporting donor information.

Packaged Software Companies
- DonorPerfect from Softerware, Inc. (http://www.donorperfect.com)
- eBase from Groundspring.org (http://www.groundspring.org)
- Exceed! Basic from Telosa Software, Inc. (http://www.telosa.com)
- GiftWorks from Mission Research, Inc. (http://www.missionresearch.com)
- GiftMaker from Campagne Associates (http://www.campagne.com)

Online Services
- Convio, Inc. (http://www.convio.com)
- DonorPerfect Online from Softerware, Inc. (http://www.donorperfect.com)
- eTapestry (http://www.etapestry.com)

Enterprise Software
- Enterprise Software is customized systems which are sold by manufacturers with consulting organizations and are designed for fundraising departments in large organizations. Advanced integration with accounting and HR systems is a common reason to buy enterprise software.
- Companies providing this software are: Best Software (programs are: MIP Fundraising Paradigm, MIP Fundraising GT pro, MIP Fundraising Millennium), Telosa, (program is Exceed! Premier) Metafile Information Systems (program is resultsplus!) and Blackbaud (program is The Raiser’s Edge)

Software Features
- Platform – what kind of operating system
- Ability to Import/Export Data
- Relationship Tracking
- Mailings
- Custom Fields
- History Tracking
- Tasks/Actions
- Build-In Reports
- Volunteer Management
- Event Management

Considerations
- Balancing the information needs with the cost of the program – including training, support and upgrades.
- Organization’s needs:
  - Software should manage the types of gifts your organization receives, your acknowledgement procedures and your tracking process.
  - Among basic fundraising software features, look for individual and organization tracking that collects all your donor information – contact information, membership level, donations, interactions history and follow-ups in one place. Gift tracking should be linked to the donor record and should link gifts or pledges to specific campaigns. Ongoing pledge payments should be scheduled so that you can see a forecast on expected cash flow.
  - List management capabilities will create and track groups of your donors based on any demographic criteria or donation history.
  - Relationships and household tracking lets you link related donors and acknowledge sponsors.
  - With mailing tools you can perform mail merges and send e-mails to your donor lists.
  - Task lists allow you to maintain good follow-ups with your donors or members and remind you of thank-you letters, mailing deadlines or other actions you need to take.
- Price Range
  - $1500 and under
    - Simple package with basic features that allow you to track what project or fund a gift goes to, enter multiple addresses for a single constituent, allow more than one user and produce simple reports. This is an option for organizations with modest development programs and a very limited budget.
    - Minimum requirement for small nonprofits should be 3,000 contacts
    - Many programs have different versions starting out with the simplest and then the capability of adding to it as the organization’s needs become more extensive.
  - $1500 - $5000
    - Packages at this level are network-ready and have all of the characteristics necessary for most development programs including coding, tracking and reporting capacity.
    - Number of donor records or contacts; price will go up with greater number.
- The more sophisticated programs can do blast emails and track volunteers too.
- All programs have a task list but the better programs actually do calendars.
- How many years does the software program manage?
- What are the standard reports and are they user friendly? How difficult is it to create a custom report?
- How does the program interface with Quickbooks or accounting system?
- Is there tech support? How much does it cost?
- What kinds of information does the organization need? What kind of queries can be made? How easy are they to do?
- **Is the software program Internet Based?** The advantages are that the information can be accessed offsite. eTapestry.com and Convio are internet based programs. Updates are done frequently. Advantage is low up-front costs, but monthly fees are charged.
  - **$5000-$10,000**
    - Include all the qualities above, and often have a wider range of data recording and data management functionality. They offer an assortment of comprehensive add-on Modules.
  - **$10,000 and up**
    - Typically customized systems designed for large institution or organizational settings. These systems are designed to work with LANS (Local Area Network), WANS (Wide Area Network) and multiple sites. They are made to handle huge amounts of constituents and data.