

Data Management:  
Where We've Been

Presented by  
**Brian M. Worrall**

November 13, 2008

CHICAGO WALLACE AUDIENCE ENGAGEMENT NETWORK  
LEARNING CIRCLE: DATA MANAGEMENT

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Session Recap

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Session Recap

*The cost of knowledge management is high,  
but the cost of ignorance is higher.*

- David Smith

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**Exercise 2**

**Capturing and Sharing Knowledge**

In groups of 4 or 5, select one organization and discuss/identify:

- What do we capture? Share?
- How do we capture it? Share it? With whom?
- Where do we put it?
- How do we put it there?

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**Overview**

**Session 2**  
**Data Management - Where We Are**

- Choosing a New Software System
- Reviewing Sample Software Systems
- Working with Existing Software Systems
- Case Studies

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**Where Do We Begin?**

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## Where Do We Begin?

*Analyze your current situation and  
where you will be in three to five years:*

- Program Operations
- Computer Equipment
- Expense Budget
- Staffing

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## What Do We Need?

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## What Do We Need?

- Development/Fundraising
- Email/Web Hosting
- Ticketing
- Accounting

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What Can We Expect To Pay?

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What Can We Expect To Pay?

- "Free" or Homemade
  - Microsoft Access
  - Usually very generic with a lot of room for adjustments
  - "You Get What You Pay For"

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What Can We Expect To Pay?

- "Software as Service"
  - Web-Based Systems
  - Monthly Fees based on number of records or functionality
  - Eliminate most hardware fees

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## What Can We Expect To Pay?

- **\$1,500 and under**
  - Very simple, basic programs
  - Limited data management capabilities and reporting
  - Single user systems

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## What Can We Expect To Pay?

- **\$1,500 to \$7,500**
  - More advanced fundraising activities
  - More detailed coding, tracking and analysis
  - 'Canned' and custom reporting
  - Fully networked, multiple users

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## What Can We Expect To Pay?

- **\$7,500 to \$15,000**
  - Broader array of data and relationship management capabilities
  - 'Add-on' modules for specialized activities
  - Integration with external, specialized software

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### What Can We Expect To Pay?

- **\$15,000 and up**
  - Customized, proprietary systems
  - Large institutional or organizational settings and multiple sites
  - Manage very large amounts of data and records

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### What Can We Expect To Pay?

*Don't Forget!*

- Cost for additional user licenses
- Outside assistance/expertise
- Data conversion
- Additional staff training
- Annual technical support agreements
- Additional / upgraded hardware

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### What Should We Look For in a System?

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### What Should We Look For?

- How do the software's features meet your specific program management needs?
- Does it work the way you work or does it force you to conform to its structure?
- Is there configuration and set-up offered by the vendor to reflect how your program operates?
- How does it look on the screen? Busy or complex? Easy on the eye?

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### What Should We Look For?

- How flexible is the user-defined coding?
- How are gifts/grants, pledges, pledge payments and "soft credits" recorded?
- How easily can we import and export data? In what formats?
- How do we perform mail merges? Custom reporting? Proposal and appeal tracking? Special events? ePhilanthropy?

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### What Should We Look For?

- How long has the company been in business?
- How many installations have they made in similar type/size organizations? Locally?
- What is the total cost? Training options?
- How is the technical support? How do I access support?
- Should we go "online" or a server-based system?

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Questions?

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Reviewing Software Systems

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**The Raiser's Edge**

- **Blackbaud, Inc. founded in 1981**
- **Headquartered in Charleston, SC**
- **15,000 organizations use Blackbaud products in fundraising, financial management and education administration**
- **Pricing based on users and functionality**
- **Training conducted regionally, online and onsite**

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## Sage Fundraising (Paradigm)

- JSI Fundraising Systems founded in 1978
- Acquired by MIP/Best Software in 2002, then by Sage Software in 2004
- Simple, "card file" interface
- Reasonable pricing options – including specialty modules
- Training conducted regionally, online and onsite
- Millennium – for larger organizations

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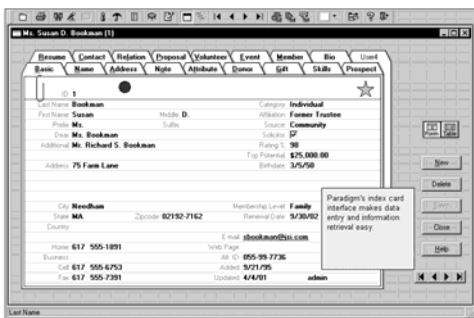
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## Sage Fundraising (Paradigm)



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## DonorPerfect

- SoftWare, Inc. founded in 1981
- Headquartered in Fort Washington, PA
- Tab-style records with open-ended customization and scalability
- Reasonable pricing options – including specialty modules
- Available in PC/Network/online versions
- Training conducted regionally, online and onsite

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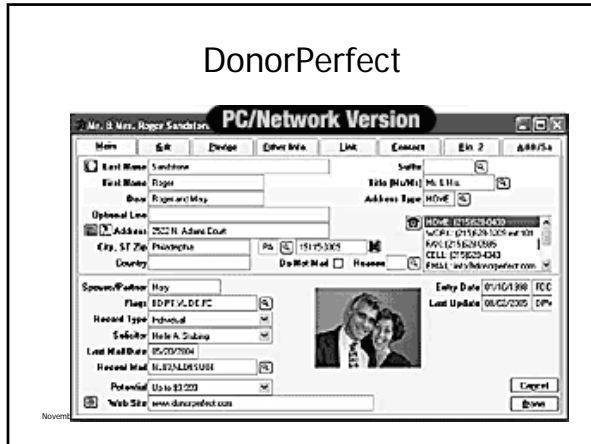
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## DonorPerfect



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## Theatre Manager

- Arts Management Systems. Founded in 1994.
- Based in Calgary, Alberta, Ontario.
- 300+ Clients since 1994.
- Offers integrated box office, fundraising and patron management.
- Pricing based on users and functionality
- Training conducted regionally, online and onsite

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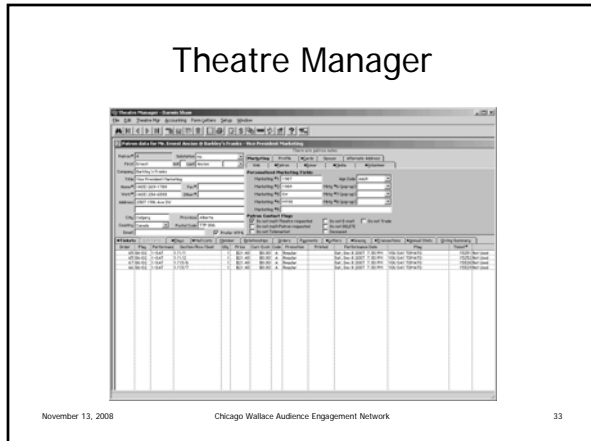
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## Theatre Manager



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## Exceed!

- Telosa Software, Inc. founded in 1986
- Web-enabled design allows for remote usage
- Reasonable pricing options:
  - Exceed! *Basic* – \$499
  - Exceed! *Premier* – \$500+ including specialty modules
- Training conducted regionally, online and onsite

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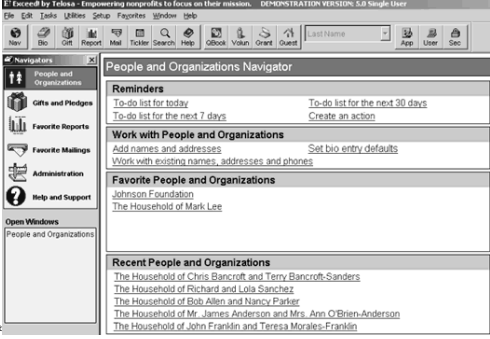
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## Exceed!



The screenshot shows a software window titled 'Exceed! by Telosa - Empowering nonprofits to focus on their mission. DEMONSTRATION VERSION 5.0 Single User'. The interface includes a menu bar (File, Edit, Utilities, Setup, Favorites, Window, Help) and a toolbar with icons for New, Open, Print, Mail, Folder, Search, Help, OBook, Voting, Grant, Guest, App, User, and Site. A 'People and Organizations Navigator' window is open, displaying a sidebar with navigation options like 'People and Organizations', 'Gifts and Pledges', 'Favorite Reports', 'Favorite Mailings', 'Administration', and 'Help and Support'. The main content area is divided into several sections: 'Reminders' with 'To-do list for today' and 'To-do list for the next 7 days'; 'Work with People and Organizations' with options to 'Add names and addresses' and 'Work with existing names, addresses and phones'; 'Favorite People and Organizations' listing 'Johnson Foundation' and 'The Household of Mark Lee'; and 'Recent People and Organizations' listing several households.

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## Total Info

- Easy-Ware. founded in 2001
- Windows PC and Mac (using Virtual PC)
- Reasonable pricing options:
  - Single User – \$595
  - Multi-User – \$1,495
- Training conducted regionally, online and onsite

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## eTapestry

- **Founded in 1999**
- **Headquartered in Indianapolis, IN**
- **First ASP (application service provider) fundraising software**
- **Monthly pricing based on volume and options**
- **Training conducted online and onsite**

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## eTapestry



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## Questions?

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Working with Existing Systems

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Working with Existing Systems

- What Can We Fix?
- How Can We Fix It?

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Case Discussion

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Questions?

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**Thank You!**

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Chicago Department of Cultural Affairs  
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