Database Resources

Zero Divide Webinars on CRM and related topics:
http://www.zerodivide.org/zerodivide-presents-techthursday

A Consumer Guide to Low Cost Donor Management Systems by NTEN and Idealware, October 2013 (compares 36 CRMs):

The Landscape of Salesforce for Nonprofits: A Report on the Current Marketplace for Apps, by Idealware, February 2014:

6 Databases Recommended by ZeroDivide:

  CiviCRM: civicrm.org
  Salesforce Nonprofit Starter Pack: www.salesforce.com
  Neon: www.z2systems.com
  DonorPro: www.towercare.com
  Powerbase: http://ourpowerbase.net/
  Salsa (formerly Democracy in Action): www.salsalabs.com
Customer Relationship Management (CRM) Possibilities
CLP Luncheon 6/09/2014

SalesForce Foundation Nonprofit CRM (salesforcefoundation.org)

- 10 free Enterprise Edition licenses
- Deep discounts on additional licenses, products and/or services from salesforce.com
- Discounts on salesforce.com training
- Discounts on salesforce.com events
- Access to nonprofit and higher ed specific user groups, events and webinars
- Discounts on participating Apps and consulting partners from the AppExchange
- Cloud based

Cloud4Good & Exponent Partners offer Quick Start Programs - $5000 for 40 hours of work to customize and configure your unique database

Their Deliverables:
- Requirements gathering, summary, and project management
- Application customization including user setup, workflow processes, communication templates, custom reports
- Data importing from predefined Excel spreadsheet
- End-user training

Beneficial SF App for Non-Profits:

Vertical Response: Numerous templates that look like you have a graphic designer on hand. Can send out physical media (postcards, etc). You create a template in SF and they send out for you. Pricing varies for: email marketing, social media, event, surveys, and post cards. Free for up to 1,000 email contacts & 4,000 emails sent a month. [www.verticalresponse.com](http://www.verticalresponse.com)


- Email Marketing/"Campaigns" with breakdown of delivered, opened, bounced back, marked as spam
- Scheduled e-mail campaigns
- Templates for newsletters and other e-mails
- Import contacts from Excel
- Price: Monthly subscription option (price depends on number of subscribers) Generally around $35/mo per user
- Sales Driven Platform – not specifically for nonprofits.
- Cloud Based
Salsa ([www.salsalabs.com](http://www.salsalabs.com))

- **Nonprofit Marketing Platform** – Create Campaigns, advocacy, fundraising, organize communication and expands your supporter/network. Many templates offered.
- Contact profiles with picture, full contact history & Grouping Options
- Event attendance records
- Can connect with facebook, twitter, and linkedin to update contact information
- Price: varies by organization’s needs. Must fill out application to get a quote. (Many companies use both SalesForce & Salsa)
- Cloud Based

Highrise ([highrisehq.com](http://highrisehq.com))

- Imports from Excel and Outlook – very basic and not entirely customizable
- Contact profiles with picture, contact history, attach important e-mails and notes to a person’s profile – Sister product of Basecamp.
- Easy Setup Reminders
- Price: varies based on number of users, storage needed, and contacts entered. Basic package $24/month for 6 users, 5gb of storage, and 5,000 contacts. $49/mo for up to 15 users and 15gb of storage. *In TINY print they mention a free plan for 2 users, no file storage, but up to 250 contacts.*

Blackbaud (eTapestry) ([www.blackbaud.com](http://www.blackbaud.com))

- 5 CRM products designed for nonprofits – many are built for larger organizations but has a project called eTapestry for smaller NPs.
- Looks complex but is highly customizable – something to grow into
- Pricing flexible according to needs ~$119/mo According to site’s starter pack.
- Cloud Based

NeonCRM ([z2systems.com/neoncrm](http://z2systems.com/neoncrm))

- Unlimited amount of users (no additional licenses fees) Limited only to 10 persons at one given time
- Link individual and organizational accounts with customizable two-way relationships
- Permissions Control for Admin v Others
- Unlimited Custom Fields for ease in adaption to your organization
- Website integration to transfer traffic, campaign sign-ups, etc to NeonCRM
- Google Analytics included
- Donation, fundraising, campaign tracking
- Mailchimp & Quickbooks Integration
- Called and received quote of $40-$100/mo for subscription for 4 staff persons but possibly more for that amount
- Cloud Based
Cloud-Based is a term that refers to applications, services or resources made available to users on demand via the Internet from a cloud computing provider’s servers. Companies typically utilize cloud-based computing as a way to increase capacity, enhance functionality or add additional services on demand without having to commit to potentially expensive infrastructure costs or increase / train existing in-house support staff.

Catch A Fire is a skills-based volunteer matching service. You become a “partner” and create a project – be it CRM database creation, a website, infographic or interesting widget additions to a website, marketing campaigns etc. A volunteer with that particular skill set then contacts you to offer their services. You then decide which volunteer you’d like to work with. There is a one-time join fee of $250, then $199/mo with no commitment. It is $149/mo if you have a long-term project and want to sign up for an entire year.

Craigslist volunteers another free and viable option for many nonprofits.

Also Free SalesForce training (mostly videos) on configuration and consulting at -- www.forcify.me

CIEA’s initial idea was to acquire a free SalesForce for nonprofits but not the QuickStart option worth $5000. Instead, utilize a Craigslist volunteer & an expert volunteer at Catch a Fire for a month or two at these much lower prices. The entire setup and training time offered by Cloud4Good and Exponent Partners is only 40 hours. One month with a volunteer would be ~$450 with Catch a Fire.
Multiple Constituent Groups, One Database? How to Track Everyone Who’s Anyone to You

December 2011
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Author: Laura S. Quinn

Since most organizations don’t track just one type of constituent, the idea of a single database for all of them—donors, volunteers, clients, email subscribers, advocates and everyone else—is something of a holy grail. The ability to easily see how all your constituents interact with your organization, and with each other, makes for an attractive, ideal vision of what a database should be.

In reality, a single constituent database usually means some sort of compromise. If your nonprofit tracks a wide variety of constituents but doesn’t need very deep functionality in any particular area, it’s feasible. But if you need to keep tabs on more complex data—like tracking stock gifts from donors, matching volunteers with volunteer opportunities based on interests and availability, and the case notes, histories and outcomes of the mental health services provided to clients—you’re not likely to find a single system to fill all your needs.

If there’s not much overlap between particular constituent groups (for example, your clients aren’t likely to be donors, and your donors aren’t likely to become clients), there may not be enough of an upside to a single database to make it worth your while. For many organizations, multiple systems can be a better fit.

But how do you determine which is the right solution for your nonprofit? We’ve designed a short exercise to help you decide.

Know Your Audience

The first step is to identify all the constituents you deal with on a day-to-day basis. These are the people you need to track. It’s likely you’ll have not just donors and clients, but volunteers, alumni, event attendees, partners, press contacts and other groups. Include them all.
Then, choose the constituent group that’s most important for your organization to track—we’ll call them your “Critical Constituent.” For most organizations, this will probably be either donors or clients. (If you have two or three key constituents, you can repeat the exercise for each, but choose one to start with.)

For each of the other constituent groups you identified, determine:

- **Their relationship** to your Critical Constituent—how likely are people in one group to be in the other? Might they move between them?
- **The complexity of the data** you need to track for them in addition to what you’re already tracking for Critical Constituents—the basics, like name, address and contact information, is probably the same for both, but there’s likely to be additional information.

Using donors as the Critical Constituent for our example, let’s compare them to volunteers as the other constituent group. Are volunteers likely to become donors, or vice versa? Might a volunteer also be a donor? Neither scenario is unusual for many organizations, so we could call these two constituents highly related. As we consider other constituent groups—press contacts, for example, or legislators—we’re likely to find far less overlap.

Next, let’s consider the complexity of the data we’ll need to track for volunteers that we don’t already track for donors. This might include the types of projects they’d like to help with, when they’re available, and their history volunteering with the organization. Because there are more than a few additional fields, this falls somewhere between medium- and high-complexity, depending on the specifics.

Once you’ve defined how complex and related each constituent is, plot your constituent groups on a chart for a look at your overall constituent picture.
Read Between the Lines

What can you learn from this constituent picture? Let’s say your groups mostly cluster toward the right side of the chart. This means you don’t have extensive additional needs on top of what you already track for Critical Constituents, and tracking them all in a single database almost certainly makes sense for your organization. You should be able to customize a database optimized for your Critical Constituents to fit everyone else, too.

But what if you have a cluster down in the lower left hand corner that shows you have some difficult-to-track constituents that aren’t particularly related to your Critical Constituents?
You’re unlikely to find a system that effectively supports substantial functionality for both types of constituents, and given how little they relate to each other, there may not even be much benefit in trying to shoehorn them into a single database.

In this case, you’re probably better off with more than one database—but how many do you need? Remove the Critical Constituent from the equation and repeat this exercise just for the constituents grouped together in the lower left hand corner. Are they related to each other? Do you need to track similar data for each of them? Again, if they don’t overlap significantly, more than two databases might make sense.

Things get more complicated if you have constituents floating in the middle of the chart, or even worse, in the upper-left corner. If that’s the case at your organization, start weighing the possibilities and tradeoffs. It might prove difficult to incorporate these constituents into the same system as your Critical Constituents. Is it worth the effort and expense? Consider whether multiple systems can be integrated so key data flows from smoothly between them through an automatic data feed. Integration is often expensive and complicated, but it can be a great solution to thorny data problems like this.

Wrapping it Up

The vision of a single database is attractive, but the reality might be neither practical nor cost-effective for your organization. Should you track all your constituents in the same system? Only if it makes sense for your particular situation. At the end of the day, that’s not easy to know.

If there’s a compelling reason to combine everything, and the benefits outweigh the risks and cost, the dream of a single database is a viable possibility. But achieving that dream requires some strategy and forethought—otherwise, your dream of a single database might just become an implementation nightmare.

Read our case studies illustrating this article, which was originally published in the December 2011 issue of the NTEN:Change journal.

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Your organization maintains relationships with a number of people in a number of different groups, some discrete, some overlapping, and being able to track and manage information about those relationships is critical to your success.

For example, maybe you have a devoted volunteer who has given faithfully to your annual campaign for years, participates in the walkathon, and got his company to match donations his coworkers make to your organization. Ideally, you have relationships with dozens of people like him, or more. In the not-so-distant past, we relied on a combination of paper files, institutional knowledge, and notes in various constituent databases to track all those details about them in a way that's accessible and actionable. But technology can provide a more holistic view of constituents — to see the different ways in which they're involved, and make sure they're being shepherded to even greater levels of commitment.

While some databases are designed to provide a detailed look into only one constituent group, like your donors or your volunteers, a constituent relationship management (CRM) system is meant to provide a high-level look at all of your different constituents. They're often marketed as "all-in-
Is a CRM a good fit for your nonprofit or charity? Let’s take a closer look at some of the determining factors before diving into recommendations about specific tools available to you.

**Do I Need a CRM System?**

Think of constituent relationship management like fishing: You can use a shallow net and catch a lot of fish, or a deep net to catch those big guys lurking at the bottom. In other words, if you need to track a little bit of information about many different kinds of things, a CRM might be a good fit, but if you need to track a whole bunch of very detailed information about just one aspect of your work, you may want a database devoted solely to that part.

For a real-world example, consider a homeless shelter that needs to manage open beds, check-ins at curfew, and confidential referrals to rehab clinics. A case management system could manage that aspect of the work, but a CRM might be a compelling approach to manage donors, volunteers, and event attendees. It’s fine to maintain separate systems alongside a CRM, as long as the data in each system is clean and up-to-date and it’s relatively easy to import and export data between them.

CRMs are, by design, very flexible, but they require a fair amount of customization in order to meet your specific needs. That customizability is their strength and weakness. Since most systems come out of the box without much specific infrastructure built in, the transition process will require lots of staff oversight to design and tailor features for your organization. However, once the process is over, you'll have a system that fits your needs without the cost or aggravation of building an entire custom database from scratch. And because custom fields and modules are relatively straightforward to add, a good CRM will be able to accommodate new processes implemented by your organization without too many growing pains.

Unless you're very comfortable with technology, you'll probably have to hire a consultant to set up your system during the initial customization process, and to be available as needed for ongoing technical support. By modifying out-of-the-box platforms, however, you'll be able to track constituents in a number of different groups — not just donors, members, and volunteers — and see the different ways that they interact with your organization. You'll also be able to track your organization's communications with its constituents if you use the database to send emails and record other interactions such as meetings and phone calls.

An experienced consultant can even build in features that go beyond basic constituent tracking, such as member dues renewal and sophisticated event workflows. The cost of implementing these adjustments to fit your company’s processes will often be offset by a lower ongoing cost — some of the platforms we'll cover don’t cost anything to acquire. Another asset of CRM systems is their ability to integrate with an organization's website, social media presence, and broadcast email.

**Comparing the Tools**

"CRM" has become something of a buzzword in the nonprofit technology sector, and is often appended to specialized databases that don’t really fit the definition of a true constituent relationship management system. This is not to say that these software systems couldn’t help you manage your relationships with your constituents, just that they don’t meet the strictest definition of the tool. Below, we look at the four systems that do meet the definition: flexible, customizable, all-in-one systems able to integrate with your online communication strategy as well as your fundraising, case management, event management, and other activities.

**Free to Acquire, but Not to Maintain**

CiviCRM
CiviCRM is an open-source, web-based CRM system offered for download at no charge. However, you'll almost certainly need a consulting firm to configure the software to your nonprofit's specific needs. Luckily, CiviCRM consultants are becoming easier to find, and there's an active community of nonprofit users who help develop and beta-test new developments. It's quite strong in helping you keep track of your constituents, households, and donations, and offers helpful event management and broadcast email functionality as well.

CiviCRM does have a few drawbacks — if your organization requires a CRM with sophisticated accounting and billing features, you may want to choose another system, as CiviCRM will require a lot of additional work. The user interface isn't always the most intuitive, either, although many improvements have been made in the past few years.

With customization, though, it's a system that could help your organization function more smoothly. Some of the out-of-the-box functionality includes CiviCase, a basic case management system; CiviSchool, which is meant to manage educational programs; and a new feature called CiviBox Office, which allows for sophisticated, airline-style seat selection for ticketed events. Beyond these ready-to-go modules, customization of the software could cost anywhere between $2,000 and $50,000, based on the complexity of the organization's needs. A consultant would almost certainly need to manage the customization, and could also manage the migration from your previous system and any technical support that might be needed down the line.

Salesforce
Salesforce is a CRM platform used widely in the for-profit world. The company offers up to 10 user licenses of the Enterprise edition, one of the tiers of the system, free of charge to qualifying organizations. Salesforce also has an implementation called the Nonprofit Starter Pack that's ready-made to fit the needs of nonprofits. The system is cloud-based and doesn't require dedicated hardware or a server. Strong in household management, donation management, and member management, Salesforce is not as strong out of the box in event or case management.

A defining feature of Salesforce is the App Exchange, a bustling online marketplace where developers sell applications designed to sit on top of the platform. There are hundreds of apps for sale, and many have been designed especially for nonprofits. These are usually offered on a monthly subscription basis, and the cost can add up, but it can also add substantial capabilities to the system.

For smaller nonprofits, Salesforce is technically free, but to properly configure and support the system, you'll need the services of someone tech-savvy enough to navigate its substantial technical intricacies and possibilities. For instance, the apps you'd need to assemble a system that meets the requirements for most religious organizations could potentially cost you thousands of dollars per year. Larger nonprofits that need more than 10 user licenses would need to negotiate a contract with the company.

CRMs with Subscription Costs
SugarCRM
SugarCRM is an open-source, web-based CRM system designed for for-profit businesses. The system vendors make no bones about their desire to challenge Salesforce for the title of most widely used CRM for enterprise. Consultants for the tool have also begun to court the nonprofit sphere.

SugarCRM is a powerful and user-friendly system but doesn't have a widely available customization for nonprofits like the other tools profiled here, so a consultant would have to build in donation management, event support, and other basic features. Almost all of the out-of-the-box language is geared toward the sales process, although the fields and modules can be modified extensively. Still, many basic features that nonprofits need will require workarounds, and SugarCRM doesn't have the ability to integrate with a nonprofit's website as seamlessly as do other CRM products.

An organization looking to implement SugarCRM would need to work closely with a consultant to tailor the software to the organization, but once the customization process was completed, SugarCRM might be a helpful relationship management tool. Pricing for SugarCRM is based on a tiered system — there's an open-source implementation called the Community Edition, which is free. Most nonprofits would want to start at the higher-level options, which range between $420 and $1,200 per staff user per year. And a consulting company would charge fees around the $10,000 mark to get the system up and running.

Microsoft Dynamics
Microsoft Dynamics CRM is the software giant's answer to an integrated CRM system, and is designed to be an all-in-one database accommodating all of an organization's needs. The Nonprofit Template, developed by Microsoft and available at no charge to sit on top of the CRM, transforms the out-of-the-box sales-centric tool into a nonprofit-centric platform. The system is pretty user-friendly, especially if you're used to Office products, and is able to handle donation management, reporting, member management, direct mail correspondence, and email. Event management and web portal capabilities are available for an extra fee but require additional configuration and more advanced technical knowledge to implement.

[Editor's note: Microsoft Dynamics CRM is available as a donated product through TechSoup to qualified nonprofits and charities. TechSoup also offers NetSuite, an integrated, cloud-based business management software solution.]

Other Options
Other vendors have harnessed the power of CRM and offered managed packages, or products you can subscribe to that are built on CRM platforms but marketed toward specific segments of the marketplace, like cultural organizations. These come with most of the features you'd need already built in, and usually require a monthly or annual subscription.

Conclusion
Whether with volunteers, donors, constituents, lawmakers, or anyone else, your nonprofit relies on its relationships to do the day-to-day work that effects change in the world and meets its mission. Managing those relationships is an ongoing challenge, but finding the right tool makes it easier by eliminating unnecessary obstacles and helping you focus on the personal aspect of these relationships.

A CRM isn't the solution for every organization, and those with specialized needs or highly focused interactions may benefit from a more specific system. It's not uncommon for donors to also be volunteers, or for constituents to donate. By tracking your relationships and making records quickly and easily accessible, a good CRM facilitates your work by letting you map the way people truly interact with your organization — even when those interactions overlap.

Thanks to the following nonprofit technology professionals for their recommendations, advice, and other help:

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- Shawn Michael, Better than Bitter Consulting
- Jane Ryan Beck, Rayogram
- Sean Speer, Exponent Partners

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Types of Databases for Managing Constituents

Which kind of system makes sense for your nonprofit?

Laura S. Quinn - July 17, 2013

Though there's no single system or even single type of system to support every nonprofit, there's a plethora of different types of constituent management systems, each with its own specific set of strengths and weaknesses that will overlap in various ways with the things you're looking to support.

Your nonprofit has constituents, and just like every other nonprofit, you want to track data about them. From donors to clients to volunteers to advocates to alumni, and many other types, your organization would love to find a magic system that lets you track everything you want to know about each type of constituent, including every interaction and every conversation they've ever had with your staff — plus the ability to spit out exactly the right information whenever you need it.

First, the bad news: That magical system is about as real as... well, magic.

The good news? Though there's no single system or even single type of system to support every nonprofit, there's a plethora of different types of constituent management systems, each with its own specific set of strengths and weaknesses that will overlap in various ways with the things you're looking to support.

Finding the system or systems that make sense for you is a matter of matching the features with your needs within the context of other criteria, like your budget. But how do you start to think about what makes sense for you?

The first step is to understand the different types of systems and their general strengths and weaknesses. If you need something strong in tracking membership dues, event registration, and broadcast email, what type of system should you look at? What if you need something with...
types of systems should you look to? What if you need something with sophisticated functionality in tracking program delivery and outcomes? Or something that integrates all your online communications and transactions?

While it might be tempting to say that you want all of those things in a single system, that's not likely to be practical — at least not at an affordable price.

**Broad vs. Deep Systems**

To get a better grasp of your options, it's critical to first understand the difference between generalist and specialist systems — in other words, between broad, shallow software and deep-targeted software.

Think of it like fishing: You can toss a wide net, scoop it through the first few feet of water near the surface, and catch a lot of different fish, but then you miss a lot of the fish swimming at the deeper depths and the biggest ones at the bottom. That's the idea of broad-reaching generalist software, like constituent relationship management (CRM) systems or online integrated tools. They cast wide nets to capture information about many different kinds of constituents, but typically don't provide as much robust support for more complicated transactions with any specific type of constituent.

Alternatively, let's say you really want to capture some of the big fish at the bottom. You can target them with a narrow, deep net that gives you access to all those fish in that one spot, but then you can't capture all the other fish everywhere else. Deep-targeted specialty software like donor management or case management systems give you powerful tools to manage information and interact with constituents, but for the most part, they focus on only one type of constituent.

Which type is better? That depends on your needs. If your nonprofit or charity prioritizes one or two types of constituents, you might be better served with one or two specialty tools, like a donor management, client management, member management, or volunteer management system. If you need to track interactions with a lot of different constituents but don't need anything particularly robust in any one area, then a generalist CRM or online integrated system might make more sense for you.

Let's look at the different types of systems one at a time to see what each does well.

**Donor Management Systems**

On the surface, these systems provide targeted support to track donors, prospects, pledges, premiums and giving levels, matching gifts, and sometimes even grants and corporate sponsorships. Most also allow you to mail-merge letters, create reports, and run queries to generate lists of donors.

More sophisticated systems offer considerably more functionality for tracking different kinds of gifts — for example, grants, online gifts, major gifts, and planned gifts — and advanced features for determining who your best candidates for donations are and the steps required to cultivate them. But such systems also require more technical savvy from fundraisers and IT staff.

Increasingly, many systems include substantial functionality beyond core donor management. Some provide online payment functionality that could potentially replace online donation or event registration systems, and others offer email functionality (though it may not be as robust as even inexpensive broadcast email software). Some donor management systems move toward the realm of constituent relationship management and market themselves as full-fledged CRMs. These systems often provide reasonable functionality to track volunteers, event registrants, or other constituents in addition to donors, but are best-suited for organizations that hold individual fundraising as a top priority.

There's no shortage of these systems on the market. Inexpensive ones like GiftWorks, Blackbaud's eTapestry, and DonorSnap start at under $1,000 per year. Mid-priced systems, like DonorPro, Blackbaud's Raiser's Edge, and Talisma Fundraising (formerly Donor2) can cost well over $10,000 to implement. At the high end of the spectrum you could easily spend $100,000 or more.
**Membership and Association Management Systems**

If your organization provides specific information and benefits to dues-paying members, you might find an association management system useful. They tend to be strong at managing yearly dues, events, and online member interactions. More advanced systems often also provide substantial donor management support as well as such functions as broadcast email and online payments.

Association management is generally synonymous with membership management, though it tends to imply a larger system that tracks both organizations and individuals as members.

At the lower end of the spectrum, less expensive online tools like Wild Apricot, 123Signup, MemberClicks, and YourMembership.com, which recently merged with competitor Affiniscape, range from about $50 to $300 per month, depending on the specific tool and how many members you're tracking. Mid-range tools (typically between $3,000 and $15,000 per year) offer deeper functionality and greater ability to configure the application to meet individual associations' needs. Hosted solutions in this range — like 4a's Association Management System and Avectra's netFORUM — tend to provide lower startup cost and implementation time but are somewhat less flexible. If you need more flexibility, consider solutions like JL Systems' NOAH or Euclid Technology's ClearVantage, which provide both the systems and the consulting to tailor them to your needs.

At the high end of the market, systems like Advanced Solutions International's iMIS, GoMembers AMS, TCS Software's Prevail, Aptify, and TMA Resources' Personify systems target larger professional or trade associations that have the technical staff in place to adopt and sustain enterprise software.

**Case and Client Management Systems**

Case management systems — sometimes called client management systems — will track the information you need to work with clients, such as age, address, job history, medical history, and childcare situation. They'll also track communications between your staff and clients as well as individualized plans for each client and the progress made toward those plans, and let you report all the information you've collected — maybe even including overall program evaluation.

Advanced case management systems can do even more, such as helping with workflow and scheduling. For instance, based on the information you enter about a client, they can recommend that client meet with a dietitian, help schedule that meeting, and send the dietitian a reminder. They can also help to automate your billing processes, particularly if you need to bill federal or local governments, programs like Medicare and Medicaid, or insurance companies.

A number of systems are intended to work across a range of human service scenarios. At the lower price end of the spectrum, systems such as ClientTrack and Social Solutions’ Efforts to Outcomes (ETO) can provide substantial tracking ability from about $3,000 to $25,000 per year. Somewhat more expensive software like Bowman Systems' ServicePoint, Service Xpert Suite by Unicentric, or Evolv-CS by Netsmart can provide more power for more expense — about $20,000 to $50,000 per year. Large organizations will likely need to look beyond these tools toward more powerful and expensive solutions, a complex marketplace beyond the scope of this guide. Organizations working in specific sectors like homelessness outreach, after-school programs, and the legal-aid sector will find that there are systems that are marketed directly to their needs.

**Volunteer Management Systems**

Do you work with a lot of volunteers, and track their hours, interests, schedules, and contributions? If you have very complicated scheduling needs or recruiting processes, it's possible that a dedicated volunteer management tool like Volunteer Reporter, Samaritan eRecruiter/eCoordinator, or Volgistics will be helpful. These systems can track volunteer certifications, background checks, hours worked, and even assign time slots based on skills and availability — for example, choose every volunteer with a third-class driver's license who is available on Thursday afternoons.

It's important to think carefully, though, about whether a system specifically devoted only to managing volunteers makes sense for you. Volunteers are frequently also donors, event attendees, or even clients as well, and other tools like donor or membership management systems may have basic- to-mid-level volunteer functionality. It's worth giving a little thought to ensure that tracking volunteers in their own standalone system won't create unnecessary data headaches.

**Constituent Relationship Management**

CRMs are designed to track comprehensive data about each constituent — not only the donations and membership dues, but also potentially event attendance, volunteer work, and anything else you might care to track about a particular
These systems are not designed to specialize in any one specific function. Instead, they start with comparatively few features out of the box and are quite flexible to let you tailor them to the processes you need to support. This means they can provide customized support to your precise needs but will almost always require customization — usually done by a consultant — to support the interactions for your specific organization.

There are four particularly widely used CRM systems: **CiviCRM**, **Salesforce**, **Microsoft Dynamics CRM**, and **SugarCRM**. CiviCRM is always free and open source, while Salesforce provides nonprofits up to 10 free licenses. SugarCRM has a free, open-source community edition of the software, as well as editions requiring subscription fees that offer much more functionality. Microsoft Dynamics CRM offers a substantial nonprofit discount — for larger organizations, it may be less expensive than Salesforce. All of these systems are fairly affordable to acquire, or even free, but are likely to require significant upfront consulting fees — a couple thousand dollars at a minimum — to make them truly useful for your needs.

CRMs tend to make sense for organizations that work with a broad set of inter-related constituents to provide a number of different services. If constituents have complicated relationships with your organization or tend to cross organizational boundaries — for example, program alumni often become donors — a CRM can be a useful way to get a full picture of each constituent. (For more information, read [A Few Good CRM Tools](https://www.idealware.org/articles/a-few-good-crm-tools).)

**Online Integrated Systems**

Online integrated systems combine different online functions in a single package. For example, they’ll often let you track donors and other constituents, send broadcast emails, take online donations and event registrations, and even manage a website — all in one system.

Because all the online components are integrated, there’s no need to sync data between different components, which makes them compelling alternatives to using, for instance, standalone email, donation, and event-registration tools. They can save you a lot of time and hassle by keeping all this data in one place, but make sure your other needs are also being met. These systems are also unlikely to be strong in every area they attempt to cover — look closely at each module to see how well it meets your needs. In particular, these online specialty tools often aren’t as strong at helping with direct mail processes and donor list-generation tasks as donor management systems are.

Prices for integrated tools vary dramatically depending on the number of constituents you track and the features and modules. Several tools, like **Wild Apricot**, Blackbaud’s **eTapestry**, and **NeonCRM** by ZZ Systems support up to a few hundred constituents for anywhere from free to $50 per month. Tools like **MemberClicks**, **Salsa** by SalsaLabs, **CitySoft**, and **Artez** provide more features for somewhat more expense. Antthara’s OneFish offers an integrated toolset with consulting help to implement it, and top-of-the-market software like Blackbaud’s (formerly Convio’s) **Luminate** provide rich toolsets for sizable nonprofits.

**What Type or Types of Systems Are Right for You?**

Unfortunately, it’s unlikely that any of these systems will be the magical one that can handle all your constituent data needs. Unless your particular needs are both basic and very common, you’ll probably need to either customize a system to meet them, decide that some of your desires are not critical and you can live without features to support them, or use multiple constituent systems.

Which is the right option for you? Start by deciding if all of your data should be in one or multiple systems by itemizing your constituents, thinking through how related they are to each other, and how much functionality you need to support each. (To learn more about this process, read Idealware’s article [Multiple Constituent Groups, One Database? How to Track Everyone Who’s Anyone to You](https://www.idealware.org/articles/multiple-constituent-groups-one-database-how-to-track-everyone-whos-anyone-to-you).)

Once you’ve defined whether you should be using one or two constituent systems — or even three, which is conceivable but unlikely pick the type of system that comes closest to meeting each need. For instance, do your requirements most closely align with a donor management system, a case management system, or a CRM? Then think through ways to supplement it, if necessary. Can you customize it to extend the functionality?

If you’re going to use multiple systems, do they overlap at all in the groups of constituents they track? If so, think through the possibilities for integrating them. You could plan to do so manually by exporting data from one program to a spreadsheet and then using the other system’s import tool to pull that data from the spreadsheet, but you’d have to do this every time you wanted to sync information, which could be reasonable only if you don’t do it very often.
Alternatively, you could invest up front to hire a skilled programmer to create an automatic connection between the two. Expect the cost for this to start around a couple of thousand dollars. It will also require both software packages to be integrated to have the functionality necessary to automatically get data in and out. If you think you might go down this path, make sure you check on the availability of automatic data insertion and extraction tools before you purchase a new piece of software.

As you're working through this process of picking a type of system, resist the temptation to hold out for a magical perfect system — remember, what looks like magic is really an illusion. Instead, focus on finding the system or systems that come closest to meeting your requirements. The truth is, the different types of constituent databases aren't as distinct as they might seem. Some offer a lot of support for donor management, the ability to track members and volunteers, considerable flexibility to track other constituents, and some support for broadcast email and online donations, and it's likely that you'll be able to find the system or combination that works for you.

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Which Edition of Salesforce Donation is Right for Me?

The Salesforce Foundation is offering nonprofit organizations 10 donated licenses of the Salesforce Enterprise edition. You can choose from two different configurations of their product donation – Salesforce CRM or Salesforce CRM + Nonprofit Starter Pack. What is the difference? Which version is right for your organization?

The stand alone Salesforce CRM is the “out of the box” edition that is generally geared towards the business world. With that being said, Salesforce is an extremely flexible platform and it can be customized to meet your nonprofit’s mission and needs. The “generic” Salesforce CRM configuration provides your organization with full control over your database; however, it might take more time (and money) to tailor it to support your operations.

What is the Nonprofit Starter Pack?

The Nonprofit Starter Pack (NPSP) was created to help nonprofit organizations use Salesforce. It was built to extend the functionalities of the standard Salesforce CRM to nonprofits in addition to supporting common business processes across social change organizations. It currently includes five managed packages

Each package consists of custom fields, custom objects, reports, workflows, page layouts, Force.com Code (Apex) and VisualForce pages.

So what are the different packages?

1. Contacts and Organizations Package – manage relationships with organizations and individuals (contact-to-contact). For example, with participants, students, or volunteers.
2. Household Package – group people who live in the same household.
3. Recurring Donations Package – track donations pledged over time.
4. Relationship Package – manage key relationships (family, friend, acquaintance, co-worker) between individuals.
5. Affiliations Package – track individual’s affiliations to organizations. For example. John...
Salesforce CRM Plus the Nonprofit Starter Pack

Pros:

- Out of the box solution that addresses key nonprofit needs
- Allows managing relationships with individuals, not only organizations
- No need to update when code changes or bugs are fixed
- Can be uninstalled easily

Cons:

- Every organization is different; it might not fit to your needs
- It is managed; cretin components are locked and cannot be configurable
- Individual module (one-to-one) is very limited
- Does not support Person Account
- Installation is complex

Implementation and Training Costs

Whether you choose the NPSP or standard Salesforce CRM, you will likely require some assistance with customization, data migration, adoption, and training. The actual cost will vary depending on your needs, the number of staff that will be trained, your data, and complexity of business processes. If the NPSP addresses your core needs it may require less customization than the standard Salesforce solution.

You Can’t Go Wrong

The Foundation enables you to sign up for a 30-day trial before you make a decision. If you are not sure, try both before you apply for the donation. Ready to get your hands on? Click here to sign up [http://foundation.force.com/products_donation_trial](http://foundation.force.com/products_donation_trial).

Please remember that with either template you choose, there may be a number of things to configure, there is no magical solution. Salesforce is one of the most flexible web-based solutions available on the market and it can be customized to meet your needs.

Still not sure? Contact us [http://cloud4good.net/contact-us/](http://cloud4good.net/contact-us/) to consult which template will be right for your organization. We provide one hour of FREE consultation for nonprofit organizations.
What is the Non-Profit Starter Pack for Salesforce?

I often get asked – what is the Non-Profit Starter Pack (NPSP) for Salesforce CRM and do I need it?

In a nutshell, the Nonprofit starter pack is a series of five add-on packages that are added to the Salesforce CRM platform. One way to compare this is to having a PC with Windows operating system and having the Microsoft Office added to it. In this comparison, the Salesforce CRM provides the platform (windows operating system) and the Microsoft Office is equivalent to the add-on packages included in the Non-profit starter pack.

The Nonprofit starter pack open sourced software package with developer contributions. And the best part of this deal is that Salesforce offers ten free licenses for free for non profit organisations. Read on to find out more.

The standard Salesforce CRM primarily deals with business-to-business type organisations and not individuals which is often the case for many Not-for-profit organisations. The NPSP addresses this by extending the existing data model and enabling a number of extensions that provide functionality to address specific not-for-profit needs.

The Nonprofit starter pack is an essential baseline for many NFP’s. However I have noticed that corporates or membership based organisations that deal with individuals as well as businesses can get some great benefits from installing one or more of the modules.

Each of the modules can be installed from the AppExchange. The modules included are:

- **Contacts & Organisations** Enables the recording of Individuals (vs. Accounts and Contacts) and allows for donation (Opportunity) rollups apply to individuals.
- **Households** Allows the grouping of Contacts by their household (place where they live). Enables for sending out single mail-out to household and provides ability to see common phone and address details across household.
- **Affiliations** Track relationships between contacts and organisation (Accounts). Provides the ability to see employment history and relationships with other organisations (eg. Being on the board of multiple organisations)
- **Relationships**. Connect two contacts with each other. Mark the relationship and current status.
- **Recurring Donations** Quickly create a schedule of donations (Opportunities) at the Account or Contact level. Enables forecasting of pledge donations.

To get the NPSP, you can sign up for a trial account and apply for a grant of 10 free licenses from [http://www.salesforcefoundation.org/tryitnow](http://www.salesforcefoundation.org/tryitnow).

If you already have the Enterprise Edition or Higher of Salesforce CRM, then you can install the individual packages from [https://appexchange.salesforce.com/industry/nonprofits](https://appexchange.salesforce.com/industry/nonprofits) or click links in package component details below. If installing the packages individually, please follow the post install instructions as failing to do so may mean the package will not work as desired.

AAkonsult Payments has specific functionality to work seamlessly with the NPSP. When using the two packages together, the NPSP memberships and payment objects are not normally used and are hidden.

More info:

- See more details on the Salesforce Foundation, the Not for profit starter pack and applying for donated licenses at: [http://www.salesforcefoundation.org/nonprofitstarterpack](http://www.salesforcefoundation.org/nonprofitstarterpack)
- Support and knowledge articles are available at the foundation community hub at: [http://powerofus.salesforcefoundation.org/publogin](http://powerofus.salesforcefoundation.org/publogin)
(requires salesforce username and password – only available for organisations that have been granted foundation licenses.

- Youtube overview of the NPSP is available at: Youtube [http://www.youtube.com/watch?v=wCIxkKOQbXM](http://www.youtube.com/watch?v=wCIxkKOQbXM)
- Attend your local Salesforce Non profit Usergroup meeting – join up at: [https://success.salesforce.com/userGroups](https://success.salesforce.com/userGroups)

Keep an eye out of future blog updates as we will be going into the NPSP modules in more detail.
QuickStart Questionnaire

We are looking forward to working on a QuickStart engagement with your organization. To help us get a head start on understanding how your organization works and the specifics of your project, please provide as much of the following information as possible. In addition to this questionnaire, we do expect we will need to have follow-up conversations regarding your requirements.

**General Project Overview**

1. Please provide the following organization and contact information:
   a. Organization Name:
   b. Website:
   c. State of Incorporation:
2. Please list the name, title, and email address for the primary contact for QuickStart implementation:
3. Are you the contract signer? Yes/No
4. If not please list the name, title, and email address of the contract signer:
5. Who is leading the project and what is his/her role in your organization?
6. What is your desired start date for the one-week QuickStart implementation? (Note that QuickStarts run from Monday-Friday.)
7. What system(s) are currently in place to track the information you are planning to track in salesforce.com? (e.g., Microsoft Excel, Microsoft Access, paper forms, FoxPro, etc.)
8. What is your current email system?

**Salesforce.com Licenses**

How many salesforce.com licenses did you request from the Salesforce.com Foundation? Please list the license users in the table below, and add rows if necessary.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Email Address</th>
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Desired Functionality

1. Constituent tracking
   a. Please list and describe the types of constituents you track (e.g. donors, volunteers, partners, media partners, etc.)
   b. List the different types of information you need to track for each of the types of constituents listed above, beyond the Standard Salesforce field list. Please reference the data import template. On the Contact worksheet, the column headers represent the standard fields available for tracking contacts/constituents.

2. Fundraising
   a. Please indicate which, if any, of the following you want to track in salesforce.com:
      i. Individual Donations
      ii. Major gifts
      iii. In Kind gifts
      iv. Pledges and recurring donations
      v. Grants received by your organization
*Please note that import of donation data is not included in the QuickStart project scope. Payment tracking is not included in the QuickStart project scope.

3. Program management
   a. Would you like to track your Programs in Salesforce? If so, please list the programs you would like to track.

4. Outreach / Marketing
   a. Do you plan to track mail and email campaigns in salesforce.com? If so, please describe.
   b. Do you want to track events and attendees in Salesforce.com? If so, please describe.

5. Reporting and analytics. Do you have specific reporting/analytic requirements beyond standard contact, activity and donation/grant reports? If yes, please attach a sample report, a mockup, or a description of your reporting needs.

6. Security. Does access to any of the categories of data (contacts, organizations, donations, etc.) need to be restricted? If so, detail which users defined above should NOT have access to particular data.

7. Data migration. We have provided templates for you to add your data after you export/extract it from your existing system. You will need to modify/adjust data as necessary so it will match what is expected for the upload/import into salesforce.com. The data export/extract must be completed prior to starting the QuickStart engagement. You may need to make modifications to the data in this template during the engagement to accommodate the specific design that we implement.
In the table below, please list all data as and where data points (spreadsheets, papers, emails) exist, and indicate where they would like to use them and indicate whether they aim to use for force.

Are there any other data migration needs we should be aware of (even if they may be out of scope for the QuickStart)?

Are there other specific considerations you might have that will help us define the scope of this project?

Thank you for your responses. We look forward to working with you in the very near term on your QuickStart project.

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<thead>
<tr>
<th>Data Source</th>
<th>Data Type</th>
<th>Import Data into Salesforce Y or N</th>
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<tbody>
<tr>
<td>Example: Outlook Mail</td>
<td>1500 Contacts for Exec Director</td>
<td>Y</td>
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