

CHOOSING FUND DEVELOPMENT SOFTWARE

In order to make informed decisions and realistic plans about your fund development program, you need to have current, useful and specific donor and prospect information. Selecting the proper fund development software to enable your organization to do this is very important.

Along with thinking through your budget, the vendor's history and reputation, technical and training support provided as well as data security, here are some things you may want your system to do. Add your ideas to each list based on your own organization's needs.

1. Constituent names

- ✓ Access by first and last names
 - ✓ Ability to recognize and keep together a husband and wife who have different names
 - ✓ Ability to recognize and keep separate individual gifts made by either the husband or the wife, especially where gifts are usually made by both together
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2. Pledges and gifts

- ✓ Show full giving history, in detail for each campaign/fund and for each year
 - ✓ Record pledges and gifts to appropriate fund (e.g., annual, planned gift, special event, special project, etc.)
 - ✓ Accommodate pledge payment schedule/projection. Must be flexible, to accommodate erratic payment schedules (e.g., donor pledges \$1,000, pays \$100 at time of pledge, wants to pay \$250 in six months, \$500 in three more months, \$150 after six more months)
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3. Reports

- ✓ Generate automatic reports (by name, by amounts due, by amounts pledged, by dates due, by fund, etc.)
 - ✓ Capable of variable sorting criteria (e.g., name, constituency type, gift range, campaign, state, those who have given, those who not given, those who have given more than once per year, zip code, age, married/single, children/no children, etc.)
 - ✓ Are compatible with the needs of your accounting/finance department
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4. Statistics/analysis reporting

- ✓ Generate reports based on a variety of sort criteria (e.g., for a direct mail program: number of pieces mailed, number who responded, largest gift, smallest gift, repeat donors, new donors, cost of mailing, income, cost of acquisition per new donor, etc.)
 - ✓ Track grants
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5. Campaigns

- ✓ Display solicitor/assignment lists (by solicitor – which prospects have been assigned to him or her – and by prospect – which solicitor this prospect was assigned to)
 - ✓ Generate prospect lists by name, amount, zip code, etc.
 - ✓ Handle word processing/personalization/merge for campaign letters
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Other areas to consider:

Mailing labels/addresses

Segmented mailings

Multi-user capability

Transferring/data conversion capability

Copying email messages to donor or prospect record
