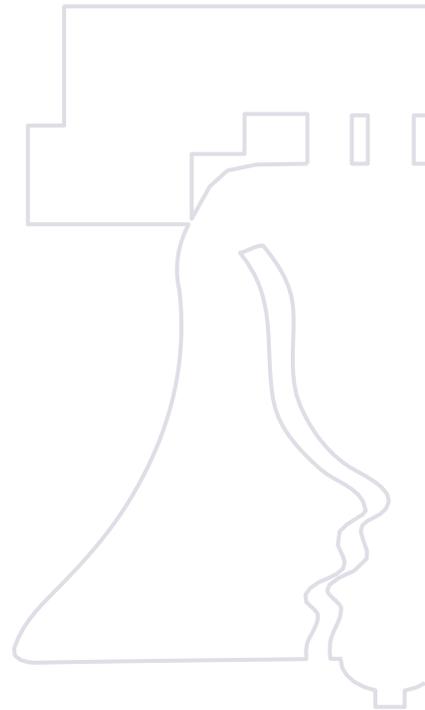


Tech Solutions that Work

Sheryl McNally
Roanoke Women's Foundation

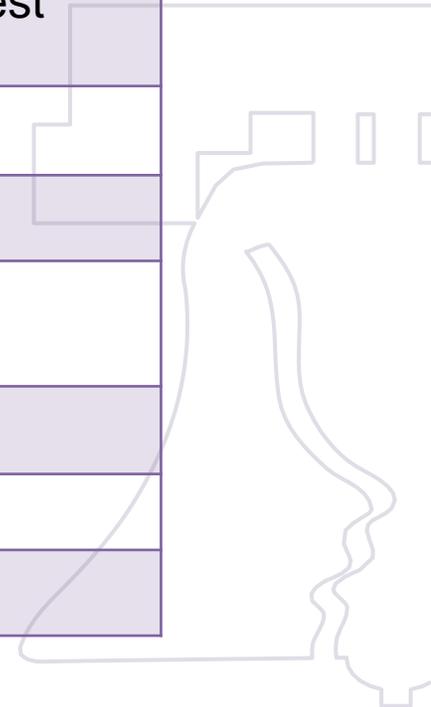
Julie Orts
Impact100 Philadelphia

October 22, 2018



Speaker Introduction - Sheryl McNally

Organization:	Roanoke Women's Foundation
Location:	Roanoke, VA
Service Area:	The Roanoke Valley in Southwest Virginia
Year Founded:	2004
Grants Awarded To Date:	\$3,067,000
Grants Awarded in 2018:	\$365,500
Members (2018):	186
Staff:	None
Board:	14 members

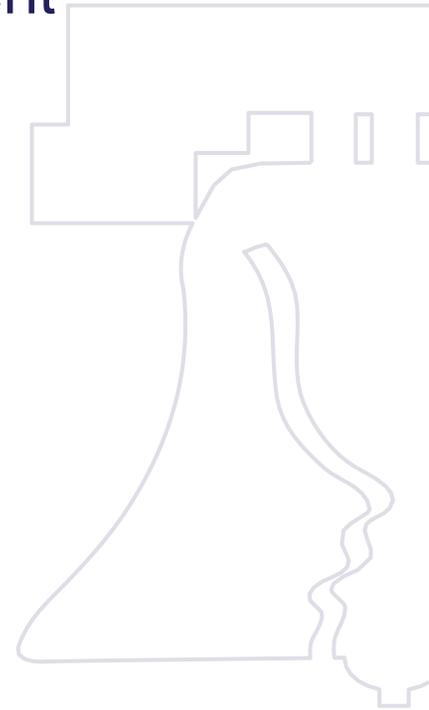


Speaker Introduction - Julie Orts

Organization:	Impact100 Philadelphia
Location:	Wynnewood, PA
Service Area:	Philadelphia and five surrounding counties
Year Founded:	2008
Grants Awarded To Date:	\$2,700,000
Grants Awarded in 2018:	\$377,000 - Three \$100,000 core mission grants and two \$43,500 operating grants
Members (2018):	377
Staff:	1 part-time paid administrator
Board:	18 members

Session Agenda

1. Impact100 Philadelphia's Donor Management System Selection Process
2. Roanoke Women's Foundation Grants Management System Implementation and Support
3. Questions and Open Discussion



Impact100 Philadelphia's Donor Management System Selection Process



Project Background

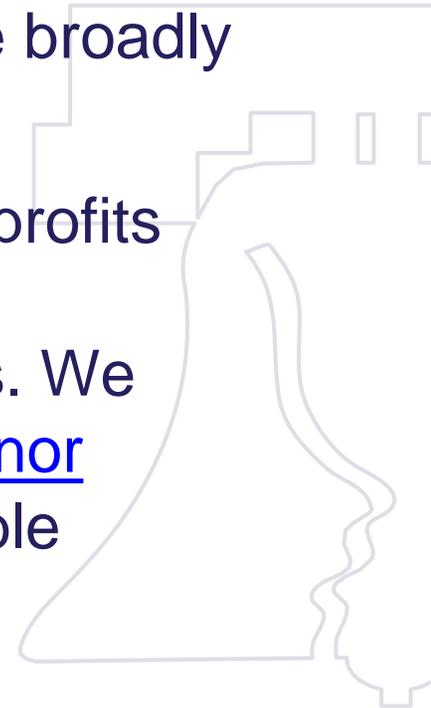
- Impact100 Philadelphia implemented Wild Apricot in 2013, replacing a database on the membership chair's computer that was being used to manage membership data.
- By 2016, our membership had grown to a point where we'd need to upgrade to the next license level of Wild Apricot.
- As we considered the upgrade cost, we decided that we needed to replace Wild Apricot with a more robust system that would integrate with our other operational systems (QuickBooks and Constant Contact).
- In early 2017, a Board sub-committee (supplemented by my Dad's professional expertise) was formed to search for an implement a new CRM system.

Project Timeline

Activity	Q1			Q2			Q3			Q4		
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
System Capabilities Defined	■											
Requirements Prioritized		■										
Side by Side Product Review			■									
Product Demos				■								
Product Selection, Contract Signed					■							
Implementation Planning and Execution						■						

System Capabilities Defined

- First we identified the category of software we needed. Wild Apricot is classified as a membership management system, but after researching different types of systems, we determined the features we needed were more broadly addressed in Donor Management systems.
- [Idealware](#) is a nonprofit dedicated to “Helping nonprofits make smart technology decisions” and has helpful software guides for different categories of systems. We relied heavily on their [2017 Guide to Low-Cost Donor Management Systems](#) to create a list of the possible features that our future system would have.



Sample Idealware Guide Analysis

	You just need the basics	You're a tiny but growing organization, and price is critical	You need something easy to set up and use	Fundraising events are a critical part of your process	You're pretty tech savvy, and you want a free system	You want to track all your constituents in one system	You need to integrate the system tightly with email and website	You need something highly configurable	You need a system that will help you categorize your donors	You need access on the go	Other good values
@EASE Fund Development Software											●
Abila Fundraising 50											●
Akubo CRM	●										
BasicFunder Premier	●										
Bloomerang			●				●		●	●	
Causeview						●		●			
CiviCRM					●	●		●			
DONATION	●										
Donor Tools			●						●		
DonorCommunity							●				
DonorPerfect			●						●	●	
DonorSnap		●									

Requirements Prioritized

- Once we had created the list of possible features, we surveyed the Board to determine which were important.
- Using the survey results, we were able to create a prioritized list of features. We reviewed these priorities with the board, made some minor adjustments, and used the resulting list to start evaluating different products.



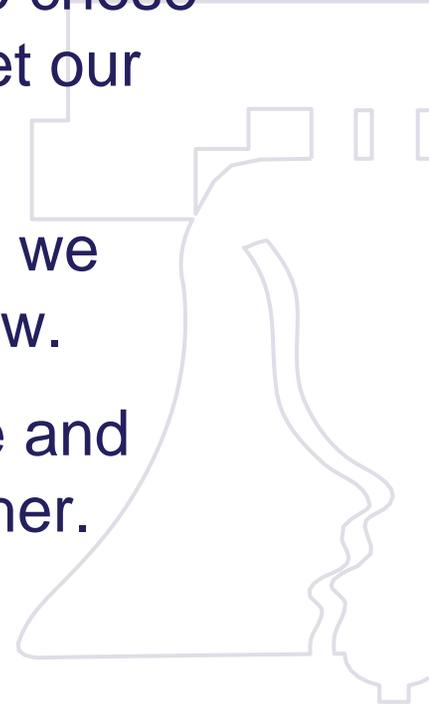
Sample Survey Results Prioritization

Category: Membership

#	Question	Priority	Must Have	Nice to Have	Not Important	Not Needed	No Opinion
1	Membership reports - Income reports, new applications, renewals	1 - Must Have					
2	Automated or flexible payment schedules	2 - Nice to Have					
3	Automation of renewals - email reminders to members, automatic record updates, automatic	2 - Nice to Have					
4	Pledge reminders	2 - Nice to Have					
5	Pledge scheduling and tracking	2 - Nice to Have					
6	Workflow for new membership applications - Payment, approval, confirmations, admin	2 - Nice to Have					
7	Year-end statements general features - Could be used to generate donation letters	2 - Nice to Have					

Side by Side Product Review

- In addition to informing our list of Donor Management product features, the Idealware Guide also helped us to identify which products we wanted to evaluate. We chose five products that we thought could potentially meet our needs and our budget.
- Using product reviews and vendor documentation, we were able to complete a side by side product review.
- We took the list to our Board Executive Committee and identified a short list of two products to look at further.



Sample Side by Side Product Review

SUMMARY	Donor Perfect	eTapestry	Raiser's Edge NXT	Green Light	Sales Force
System Fundamentals					
General Characteristics	Cloud-based ready-to-run system with web browser and mobile app interface for remote users.	Cloud-based ready-to-run system with web browser and mobile app interface for remote users.	Cloud-based ready-to-run system with web browser and mobile app interface for remote users.	Cloud-based ready-to-run system with web browser and mobile app interface for remote users.	Cloud-based "Open Source" system with web browser and mobile app interface for remote users.
Subjective Observations	Strong positive feedback from existing clients	Both eTapestry and Raiser's Edge NXT are products offered by the same company, Blackbaud. eTapestry, recently acquired by Blackbaud, was one of Raiser's Edge major competitors. It's likely, some industry analysts feel, that one or the other of the two products will be phased out over the next few years to allow Blackbaud to consolidate their engineering and technical support resources. Until this shakes out, it would be imprudent to install either of these systems.		A capable, but lean, system primarily in use by non-profits much smaller than Impact100	Not a ready-to-run application package, but rather an extensive tool kit of compatible application modules that must be selected and assembled prior to installation and use.
					Strong positive feedback from existing clients
"Must Have" Requirements					
	Fully satisfies all "Must Have" functional requirements	Fully satisfies all "Must Have" functional requirements	Fully satisfies all "Must Have" functional requirements	Satisfies "Must Haves" except no smart phone app; Custom Reporting is weak	Fully satisfies all "Must Have" functional requirements
"Nice To Have" Requirements					
	All satisfied except: - Matching Gift tracking	All satisfied except: - Matching Gift tracking - Limited QuickBooks Integ.	All satisfied except: - Matching Gift tracking - Limited QuickBooks Integ.	All satisfied except: - Matching Gift tracking - Limited QuickBooks Integ. - SmartyStreets Integ. - SQL Inquiries	All satisfied except: - Matching Gift tracking
Estimated Annual Operational Costs for 3+ Users 7,500+ Donors					
Year 1 Tech Costs (Incremental)	1/2 time Tech for 6 mos.	1/2 time Tech for 6 mos.	1/2 time Tech for 6 mos.	1/2 time Tech for 6 mos.	Full-time Tech for 6 mos
Year 1 Processing Costs	\$3,228.00	\$3,108.00	"By quote only"	\$708.00	\$1,092.00
Ongoing Processing Costs	\$3,228.00	\$3,108.00	"By quote only"	\$708.00	\$1,092.00

Product Demos

- We participated in public webinars for each of our two products to get an overall sense of the product capabilities.
- We then contacted each software vendor to schedule a private demo for a group of board members. One of our vendors didn't actually offer private demos so we evaluated them based on the information we were able to gather.
- The demo gave us the ability to get a better understanding of the product features and to ask questions specific to our intended use of the system. We felt good about what we saw and decided to move forward!

Product Selection, Contract Signed

- First we requested a pricing quote from vendor that included an annual software license, implementation, and training options.
- We evaluated the options to determine which were the best fit for Impact100 Philadelphia.
- We were able to leverage our [TechSoup](#) membership to obtain a product discount.
- Although there were limited negotiation options to further reduce the cost, the vendor included two paid user conference registrations in our first year agreement – it never hurts to ask!



Implementation Planning and Execution

- Identified project lead and implementation resources.
- Developed a phased implementation plan with input from the product vendor.
- For our implementation, the steps included:
 - Data conversion
 - System configuration (including users, templates, basic processing)
 - Donation forms creation
 - Integration with Constant Contact and QuickBooks



Roanoke Women's Foundation Grants Management Software Implementation and Support



Why did we purchase new software?

- The RWF is not an independent 501(c)(3). RWF serves as a field of interest fund for the Foundation of Roanoke Valley (FRV).
- FRV was no longer able to manage our grants process.
- RWF determined the best way to accomplish our grants process would be to purchase new grants management software and eliminate administering any portion of the process by hand.
- After careful research we selected a grants management system and entered the implementation phase.



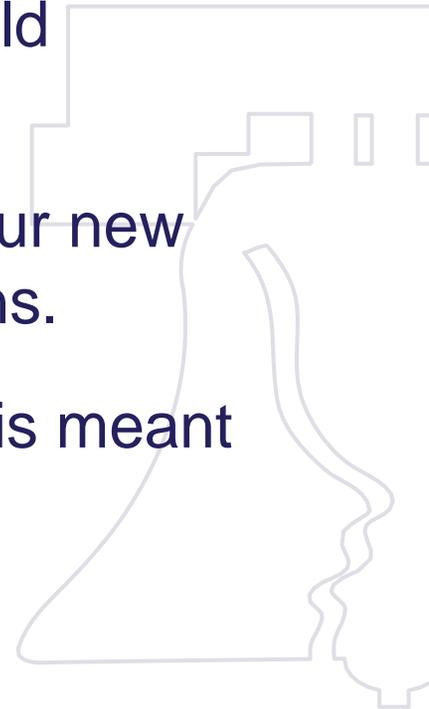
Implementation of New Software – Questions to Consider

- When does the process go live?
- Who will implement the software?
- What data requires migration into the new software?
- What new data should be included?
- Who is going to use the new system?
- Who will support the new system?



When does the process go live?

- Create a realistic timeline to build a new process.
- Include time to train members, migrate data, and anticipate any new information your software should evaluate.
- Consider how you are going to share and open your new process for active use by members or organizations.
- RWF had 3 months until our process went live. This meant we were very busy ladies!



Who will implement the software?

- Since RWF was implementing grants management software, the past grants chair and current chair were selected.
- Depending on the scope of software, it may take several months of training sessions with a software client manager.
- We met with our client manager weekly for a period of three months to determine how to fully build, vet, and manage our new software system.
- We completed “homework” assignments that lasted approximately an hour each between our meetings.

What data requires migration into the new software?

- If you have old data in another program it might be easiest to export data from one software system to the next. This can be done under the guidance of the new software client manager.
- We were able to migrate our old process into our new system saving considerable time. If you need to build the whole process from scratch, it could take significantly more time.
- A test site was used before copying the process into our live site.

What new data should be included?

- Our team carefully reviewed the established grants LOI, Application, and Evaluation questions. We considered future implications, benefits and drawbacks for each question in every area of our process.
- It is important to remember that each response to a question serves as a data point.
- Each data point can be used for future reporting purposes.
- Questions producing data points should not be changed from year to year if reporting features are important to your organization.

Who is going to use the new system?

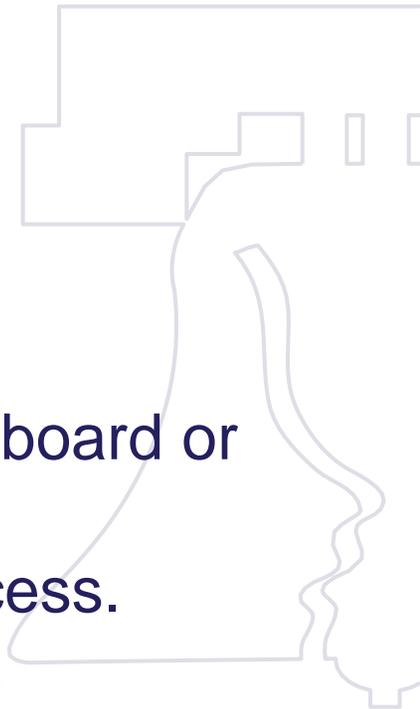
Roll Out for Internal Users

Grants Committee

- Chair and assistant chair.
- Members change annually.
- Training from client manager.

Additional Support for Committee Members

- Log in as another member to work from their dashboard or home screen.
- Screen shot steps to guide members through process.
- Conduct individual training in person or via phone.



Who is going to use the new system?

Roll Out for External Users

Organizations

- Communicate through local non-profit agencies inviting new organizations to create a profile.
- Email your data base to encourage organizations to update their profile.
- Link to grants management system on website.
- Train by power point session in person and post to our website before our process goes live annually.
- Respond to individual concerns many of which stem from personnel changes and updating their profile.



Who will support the system?

Vendor Support

- Most large software systems have great complimentary support systems to answer your questions.
- On-line tutorials.
- Virtual chat.
- Call and speak to a representative.
- Webinars explain software updates and new features.
- Vendor support will fix almost any problem for you if it is within their software's capability!



Who will support the system?

Long-term System Sustainability

- Identification of members to manage software. This can be a huge challenge in an all volunteer organization!!!
- Most software systems are pretty intuitive to navigate.
- All one needs is a desire to learn and not be afraid to make mistakes.
- Time can be the trickiest factor. It takes time to train and learn how to use new software. We are all busy women!
- RWF continues to pay our grants management software company for annual training of at least one member.

Thank You!

Sheryl McNally
Roanoke Women's Foundation
sherylmcnally3@gmail.com

Julie Orts
Impact100 Philadelphia
julieimpact100@gmail.com

Q & A

#WeTheWomen2018

WC WOMEN'S
GN COLLECTIVE GIVING
GRANTMAKERS
NETWORK

