Agenda Item III.D.

Society of American Archivists Foundation
Board of Directors Meeting
March 13 – 14, 2015
Chicago, Illinois

Tools for Donor Tracking

(Prepared by Foundation Vice President Carla Summers)

BACKGROUND

After reviewing several donor management software packages, I met by telephone, on February 17 and again on March 2, 2015, with SAA Finance/Administration Director Peter Carlson and Web and Information Services Administrator Matt Black to discuss the needs of the Foundation to track information on donors. Although the current number of donors is small, all SAA members are prospective donors (more than 6,000 people) as are members of archives affinity groups. With no good way to track data, it's possible that our number of contributors will remain small. Donor management software is a way to take our asking and the giving to the next level.

SAA's current member management system, MemberMax, is likely to be replaced in the next couple of years. SAA needs a more flexible system and there is discussion of designing an RFP to define the organization's needs in the near future. Peter doesn't think it would be worth it at this point to massage MemberMax to meet the needs of the Foundation. Peter is familiar with a host of donor management software that has low footprints and low barriers to implementation.

In the past we have distributed donor contact forms to be completed following any interaction with a donor. This was a simple form filled out by hand and forwarded to me to file. (A sample is attached.) Other donor information has been shared by anecdotes with other Board members on our interactions.

DISCUSSION

The right donor management software can help us to create the right targeted lists to ensure each of our constituents gets a message in a way that will encourage their support – and make a big difference in our ability to raise funds. Because we are a volunteer leadership, it is a way to record our interactions over the long term. Understanding that we respect our past interactions/transactions helps our donors to trust us. The Foundation is a new experience for SAA members and we must work hard to build respect for their input and observations. After implementation, a donor management system could ease the workload on staff. With a secure portal for Board members, the Board could research and update our own contacts with donors.

Of course, we need a clear understanding of the resources we can devote to purchasing and sustaining a new system. How much money can we commit up front, and over time? How much time do Board members and staff have to set up, learn, and maintain a new donor management system over the long term? What are the strengths and limitations of the SAA office's current technology and financial infrastructure? The implementation of donor management software is challenging and we might benefit from implementation support from a vendor or an experienced third-party consultant. Compatibility with any new member management system is crucial.

Donor Management System Feature List

This feature list is taken from the much larger and in-depth document from IdealWare titled "Do you need a Donor Management System" (http://seminars.idealware.org/documents/donor_management_workbook_v3.pdf). It is contributed by Matt Black, Peter Carlson, and Carla Summers.

BASIC FEATURES

- Store contact info for donors/ prospects
- Add and view multiple donations per donor
- Track relationships between donors/ prospects
- Track different info for organizations and individuals
- Access donor data over the internet
- Log communications between Board, staff and donors
- Add custom fields to data forms
- Create mail-merged letters for solicitation and acknowledgement
- Generates automatic confirmation and thank you messages.
- Create lists of donors based on gift or contact info
- Generate reports on past gifts
- Batch data to post to accounting system

MID-RANGE FEATURES

- Track pledges, recurring, or future gifts
- Track soft credits, matching gifts, or split gifts
- Enter a large number of gifts quickly
- Track honorarium, memorial or tribute gifts
- Easily group constituents into households
- Set a reminder to follow up with
- Track progress on a grant proposal
- Set up different degrees of access for Board and staff
- Generate charts and graphs of donor data

- Flexibly place custom fields in an intuitive location
- Report on gifts based on source or campaign
- Import/export data automatically (i.e. via API)

ADVANCED FEATURES

- Record donor prospect research.
- Tailor the interface to each user's particular needs
- Support complicated gifts of stock
- Easily handle donor divorce
- Provide easily accessible wealth-tracking information
- Automatically flag good prospects using algorithms
- Track gifts in a strictly financially auditable manner
- Save and easily access reports with custom parameters
- Create pipeline report forecasting upcoming gifts
- Supports in-kind donations, tax receipting, pledges, recurring gifts and honor or memorial donations.

I propose that the Board begin the process of identifying the Foundation's needs for donor management software in anticipation of a new member management system for SAA or a stand-alone system. Peter and I have designed an exercise to rate features of a donor management system to further clarify our needs.

Donor information is often detailed and includes complex relationships. Capturing, storing, and retrieving this information effectively requires a clear understanding of typical procedures. Looking at how we engage prospects and how we encourage them to commit further will engage the Board to envision fundraising. At this stage, we can go a long way by considering the information we would like to collect and how we would like to retrieve this information for analysis and communications. By focusing on our outputs we can decide what combination of donor information we need to gather for reports, mail merges, communications, or exports.

Costs could range from simply creating a password-controlled website to recording donor information to a full-fledged software implementation with consulting support.

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CONTACT REPORT

Constituent Name(s): ____

Business/Organization *(if applicable):* __________________________________

Date: _______________ **Location:** ___________________________________

Category: ☐ Phone Call ☐ Meeting ☐ Mailing ☐ E-mail ☐ Other

Type: ☐ Cultivation ☐ Stewardship ☐ Solicitation/Proposal ☐ Proposal Follow up

Amount requested *(if applicable)*: $____________________

Proposal Name *(if applicable)*: _______________________

Description/Purpose:____

Notes/Comments *(use back if necessary)*:

Next Action Steps:

1. ____ Due: _______
2. ____ Due: _______

Status: ☐ Open ☐ Complete

____ __________

Signature **Date**