

Fundraising Databases: Finding Software that Fits

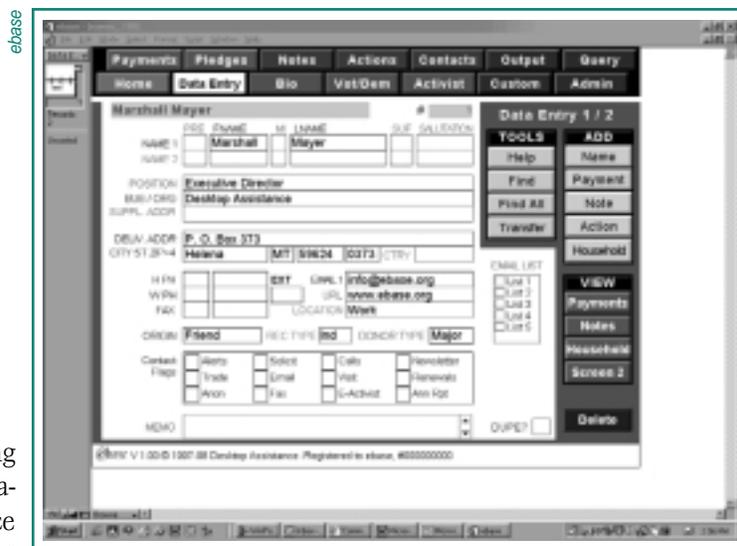
by Kendall Slee and Dale Bonar

WHEN KIERAN ROE BECAME THE FIRST EXECUTIVE DIRECTOR of the Carolina Mountain Land Conservancy (NC) in spring 1999, one of his first projects was to update the land trust's member database—kept in a ClarisWorks spreadsheet. “There were about 10 fields in the database,” he recalled. “It wasn't tracking members' giving histories. When a new donation came in, it would replace the last recorded donation” rather than keeping a record of the donor's giving history.

Within two months, Mr. Roe had converted the database to ebase, software for nonprofit environmental organizations that can be downloaded free from the Web [see box, page 23]. The land trust purchased FileMaker Pro, the software “platform” on which ebase operates, giving it greater ability to make changes to the database and customize reports. The new software helps the land trust record a broader range of information, including members' giving histories and the skills and interests of its volunteers. It can also produce a variety of reports, such as one that identifies board members who know the recipients of member solicitations and can add personal notes.

For land trusts large and small, an effective database of donors and potential donors is a key element of successful fundraising. LTA interviewed 26 land trusts of various sizes across the country to learn about the database software they use to track members and supporters and the lessons they've learned about database management.

Like Carolina Mountain Conservancy, Natural Lands Trust



(PA), a land trust with a staff of 50, was looking to improve its fundraising program when it upgraded its database in 1998 from one staff had built using FileMaker Pro. The land trust chose Raiser's Edge, one of the most sophisticated off-the-shelf fundraising database programs on the market.

“We were investing substantially in growing our membership,” said Director of Marketing and Communications Oliver Bass. “We wanted to track more information, particularly on major donors.

“The new database allows us to customize our contact with donors a lot more. For example, it sends automated reminders to staff to assure that when we get a gift of \$500 or more, the board is informed and the donor gets special acknowledgement,” he explained.

The software also allows the land trust to track each of its fundraising campaigns, Mr. Bass added. “With a couple clicks of a button, I can see how that campaign's progressing, and I can keep track of the expenses.”

A Wide Range of Software

While some land trusts design their databases from scratch in FileMaker Pro or Microsoft Access, others use and adapt one of the many “off-the-shelf” software packages—such as ebase or Raiser's Edge—made for nonprofit organizations to track donors and their gifts.

Off-the-shelf database software comes with pre-formulated fields and standardized reports such as lists of donors at specified giving levels, or donors by city or zip code. Some have

Date	Amount	Type	Contributor
4/1/2000	\$250.00	Pay-Cash	McFarland, Ms. Marie
4/15/2000	\$100.00	Pledge	Hernandez, Dr. Robert Carlos
4/16/2000	\$5,000.00	Pledge	Norman, Mr. Frank

Day	Received	Pledged	Paid	Withdraw	Balance	Total Committed	No. Gifts
cash	\$36,984.00	\$15,475.00	\$13,376.00	\$0.00	\$5,096.00	\$47,360.00	2847
4/1/2000	\$1,736.00	\$1,256.00	\$1,256.00	\$0.00	\$0.00	\$2,992.00	114
4/2/2000	\$1,693.00	\$1,643.00	\$505.00	\$0.00	\$1,138.00	\$2,796.00	97

specialized features that track such items as pledges that need to be collected, or membership renewals that need to be mailed. Some also provide reminders to individual database users on “tasks” to complete such as phone calls, reports or letters. Off-the-shelf member/donor database software used by the land trusts interviewed generally fall into three price ranges: low (less than \$3,000), mid-range (starting at \$3,000) and high (starting at \$5,000) [see box, page 23].

While generic database software such as Microsoft Access or Filemaker Pro can be purchased for \$200 to \$350, the greatest expense comes in designing and programming the database. (The structure of the database, its fields, tables, entry forms, queries and reports that draw on the data must essentially be programmed from scratch.) Estimates for professionally custom-built databases from MS Access vary with the complexity of the database. A basic, custom-designed member/donor database requires at least 100 hours to develop, and costs from \$10,000 to \$20,000, according to some database developers and land trusts who have hired database designers.

Some land trusts with databases built pro bono by professionals or volunteers reported that they are dependent on the database’s creators, particularly if documentation has not been kept about how the database was set up. “While I feel fortunate to have the services of this volunteer, I am concerned about the fate of such important information resting in the hands of one person who gives his time out of goodwill,” noted a staff member of one land trust whose MS Access database was created and continues to be maintained by one volunteer. Even with basic training in the program, “I still don’t think that would address the need for ongoing consultation with someone who has very specialized, technical knowledge about programming,” she added.

Particularly for those unfamiliar with databases, general database programs (such as MSAccess, FileMaker Pro or Paradox) tend to be less “user friendly” than off-the-shelf packages that requires less customization, reported a number of database developers and land trust users. “It has taken a large amount of work to get everything working right—queries, reports, labels, etc.,” said Cindy Southway, co-executive direc-

tor of Grand County Land Conservancy (CO), which developed its database in MS Access. The conservancy, like a number of other land trusts that work with MS Access, hires a consultant to help with major changes to the database.

On the positive side, technical support is widely available for well-known database programs such as MS Access or FileMaker Pro. In addition, generic database software offers a great deal of flexibility for an organization seeking a database tailored to its needs.

Jackson Hole Land Trust (JHLT) (WY) is generally satisfied with its self-designed 10-year-old database in FileMaker Pro, reported Director of Development Julie Jones. The database is used for “tracking donations and progress with capital campaign prospects, managing field trips, conservation buyers and gift acknowledgments, among other things,” she said. The staff handles the database’s ongoing customization for the land trust’s changing information needs such as tracking new events and new fiscal years, Ms. Jones added.

Minnesota Land Trust opted to build a database from scratch in MS Access in 1997 after it decided that off-the-shelf software couldn’t meet its needs. The land trust hired a part-time programmer at a discounted fee and then found a pro bono programmer to finish the project after the first programmer quit before the database was completed.

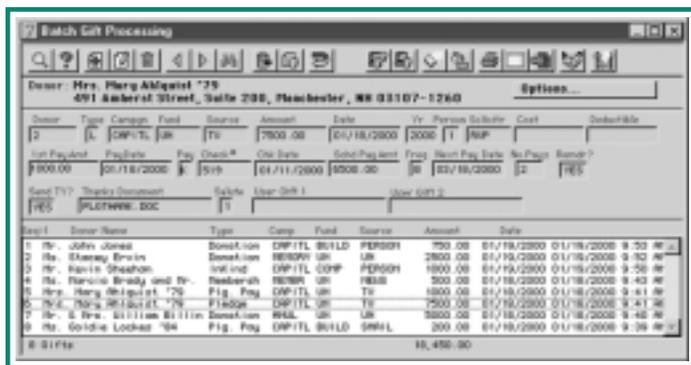
“It’s easy to underestimate the time involved,” noted Beth Hayden, administrative coordinator for Minnesota Land Trust. “There was a lot of time spent talking to the programmers about what we wanted the program to do. There was a lot of time testing the database, working out glitches and doing follow up correspondence with programmers.”

The result has been a system tailored to the statewide land

Standing	Category	Program	Subcategory	Date
Active	Sponsor	Full		1/1/2000
Lapsed/Dropped	Sponsor	Full		8/2/2000

Field	Value
Membership ID	364
Dues	\$100.00
Program	Full
Category	Sponsor
Subcategory	Annual
Renewed on	11/20/99
Expires	11/20/2000

Field	Value
Date joined	5/14/92
Last renewed	11/20/99
Last dropped	7/14/92
Total years	7
Times renewed	4
Consecutive years	7



trust. The database can track information by Minnesota Land Trust's 10 chapter areas. It also can categorize all types of donations, whether planned gifts, annual membership contributions or stewardship donations related to a specific conservation easement, said Ms. Hayden. "So far it's really allowed us a lot of flexibility."

MLT is seeking to hire a programmer to build the second component of the database, which will track its land protection projects, including projects in negotiation. [See box, page 22.]

Shopping Around

Before looking at specific software, land trusts should care-

fully evaluate their database requirements—include input from all the potential users of your database—and try to anticipate future needs. This requires a careful analysis, not only of the data you intend to collect, but of the queries and reports you will need.

Susan Hemmeter, director of development for the Vermont Land Trust (VLT), helped New Jersey Conservation Foundation select new database software before joining the staff of VLT and guiding it through a similar selection process.

She advises land trusts try anticipating their information needs 10 years out before they invest in major changes to their database or database software. For example, when VLT changed databases in 2000, it looked for one that allowed remote access and could potentially be used by the land trust's field offices. "It's not something we use right now, but it's something I can see we might need in the future," Ms. Hemmeter said.

Here are some other important considerations:

- **Conversion and compatibility.** How compatible is the database software with the data that you already have, and the other software that you use? How can you convert your current data to the new database? Do your computers have capacity to run the software, or will equipment need to be upgraded?

What Land Trusts are Tracking

Land trusts reported tracking the following information in their databases about donors and prospective donors. (Many also reported tracking this information on volunteers, foundations, businesses and landowners who have sold or donated property interests to the land trust.)

- Full Name
- Title
- Spouse/Co-habitant name
- Special salutation (if President prefers to address donor by first name, etc.)
- Mailing address
- Home address (if different from mailing address)
- Seasonal address (e.g. for vacation homes)
- Telephone number(s)
- E-mail address
- Amount and date of gift/donation
- Source of donation (e.g. mailed solicitation, personal phone call, event, etc.)
- Additional involvement in your organization (e.g. board member, vendor, volunteer)
- Willingness to volunteer and areas of volunteer interests/professional skills
- Whether permission has been given or withheld to exchange or rent a donor's name/address (Many land trusts said they have policies against releasing donor names.)
- Special programmatic interests (land protection within a specific area, field trips and events)*
- Fields to accommodate donor requests for limited mailings (e.g., 'Please solicit only once a year,' option to remove donor from newsletter mailing list)
- Likes or dislikes that affect raising money from this donor (e.g., vegetarian, likes/dislikes hunting)
- Other organizations the donor supports; notes on amount of outside donations*
- Names of people in your organization who know or can contact the donor personally*
- History of contact with donor (calls to/from staff or board members, attendance at an event, etc.)
- Target giving goals for major donors (this may be a medium-term goal for the next few years)*
- Any known planned giving by donor to your organization (bequest or charitable remainder trust)
- Helpful contacts the donor has *
- Pledges
- Gift memberships
- Memorials/honoraria

*These items were frequently cited as information the land trust doesn't track, but would like to track.

■ **Access to training/customer support.** When Grand Traverse Regional Land Conservancy (MI) reviewed a number of similarly priced database software, it found its top choices had very similar capabilities. The deciding factor that prompted the land trust to install Donor Perfect was service and support, said Comptroller Birgit Yetter, noting that the Donor Perfect vendor was the only one they spoke with that offered to convert the data from their previous database onto the new system.

(On the other hand, a West Coast land trust reported that it is disappointed with the quality of the Donor Perfect manuals and has had difficulty getting timely technical support.)

Many off-the-shelf software vendors have an annual fee for customer support; others may charge by the hour for support. Training and support options range from courses on CD-ROM, to individual consultation by telephone, to classroom instructions.

When Columbia Land Conservancy (NY) purchased JCI Paradigm, it opted to hire a local consultant rather than send staff long distance to classroom training. "We decided it would be more cost effective to use someone local who was admittedly not a Paradigm expert but could help get us going. It worked very well. She would come in for two to three-hour sessions and train three of us in the office," said Membership and Outreach Coordinator Kristina Kwacz.

■ **Outside opinions.** "Talk to people who use the software,"

advised Ms. Hemmeter of VLT. When she was researching software for the New Jersey Conservation Foundation, she spent some time observing how another nonprofit used the program. She recommends going beyond the usual short list of references provided by the software vendor and asking for a list of all the organizations in your area that use the software.

Once you have selected your software, prepare for a great deal of work and time to convert data from your old database, advised Ms. Hemmeter. "Make it at a time of year that is the least busy for your fundraising staff. If you don't spend time cleaning up data and planning the conversion, then you'll spend time afterwards on implementation and cleanup."

Depending on the amount of data, the conversion process can range from just a few days to a few months, land trusts reported. Either way, there is an additional adjustment period, as organizations familiarize themselves with the new software and work out glitches.

Managing Your Database

"Databases are never perfect because the information is always changing; it's an ongoing part of our management," observed Ms. Kwacz of Columbia Land Conservancy. Here are some tips land trusts shared on keeping your database as near-perfect as possible:

■ **One person should be in charge of managing the database,**

Integrating the Future

The dream database of the future? For many land trusts, it's one that integrates a wider range of the information they track, so they don't have duplicate or related information in segregated databases (landowners of property under conservation easement in one, donors in another, for example). Some envision integrating GIS data, which would allow them to map land protection priorities, identify donors and potential donors near protected lands, or better track and plan for annual monitoring visits to protected properties, for example.

Land trusts looking to expand their database to track the full range of activities are hard-pressed to find an off-the-shelf software that meets their needs. Software designed for typical nonprofit organizations does not include such land trust-specific features as a system for tracking land protection projects, landowners, easement donors, stewardship and monitoring. Nevertheless, a few software packages that target land trusts are being developed:

■ **Superior Software Training & Development**, based in Kalamazoo, MI, has developed a database module to track protected lands ("Protect IT") that integrates with the Conserve IT software it developed for tracking members and donors [see box, page 23].

■ **Grand Traverse Regional Land Conservancy (MI)** has contracted development of an MS Access-based land protection database to better organize and track the many conservation projects in the negotiation process, as well as those it has completed. The model is in Beta testing and the developer (Serussell Consulting of Kalkaska, MI, 231-258-8442; srussell@torchlake.com) plans to market the program to other land trusts starting early this year.

■ **Newburyport Computer Associates, Inc.**, in Haverhill, MA, (987-373-9646; susan@nca-corp.com) has developed an MS Access-based land management database in conjunction with a local land trust, and is developing a membership management module that can be integrated with the lands module.

Meanwhile, Eastern Shore Land Conservancy (MD) is already linking documents such as conservation easements and monitoring reports to its database using Paradigm software. What kind of database is next on ESLC Director of Administration Nina White's wish list? "One that would do data entry for us," she laughed.

“Off-the-Shelf” Database Software

There are a number of software packages designed to help nonprofit organizations cultivate individual donors. While few are specifically designed for land trusts, here is a sampling of the software land trusts are using.

For a more comprehensive list of fundraising software for nonprofits and further information on software selection, visit these Web sites:

- The Nonprofit Software Index catalogs 45 fundraising software packages, many of which are member/donor databases, www.npinfotech.org/TNOPSIS/fundrais/frindex.htm
- The New York Foundation for the Arts “Nonprofit Toolkit,” www.nptoolkit.org/forum.html

Please note that LTA has not reviewed any of the following database software, nor does LTA endorse any specific software package or vendor.

Low Cost Member/Donor Database Software • (less than \$3,000)

Conserve IT

Price: \$999 “network ready” for unlimited users

By: Superior Software Training & Development, www.sstraining.com; 616-375-9700.

This software is specifically designed for land trusts, using Microsoft Access as a base. The database was developed for a Michigan land trust, and is now being marketed to other land trusts. A new land tracking module, Protect IT, has been developed to fully integrate with the membership module.

Some land trusts that use it: Little Forks Conservancy (MI), Seacoast Land Trust (NH), Southwest Michigan Land Conservancy has a prototype version.

Technical support/Training: Comes with 30 days of free support.

Comments: “If I had no knowledge of MS Access, I would still find this software very easy to use. It’s all menu-driven,” said Doug Koop of Little Forks Conservancy.

ebase

Price: No charge

By: Created for nonprofit environmental/activist organizations by Desktop Assistance (now TechRocks, a subsidiary of the Rockefeller Fund) with funding by several major national funders. Written with FileMaker Pro, ebase is a “stand alone” database that can be downloaded for free from the Web site, www.ebase.org. Most users purchase FileMaker Pro so that they can better manipulate data and customize their database and reports.

Some land trusts that use it: Deschutes Basin Land Trust (OR), Gallatin Valley Land Trust (MT), Skagit Land Trust (WA), Legacy Land Trust (TX), Eagle Valley Land Trust (CO), Carolina Mountain Land Conservancy (NC).

Technical support/Training: Offered primarily through user listserves, monitored and supported by TechRocks staff. Regional trainers are available around the U.S.

Comments: “It’s got features that, in a prepackaged software, you would be paying several thousand dollars for,” said Kieran Roe of Carolina Mountain Land Conservancy. A number of land trusts report that they installed the software and converted their existing data on their own (but not without some trial and error).

Mid-Range “Off-the-Shelf” Member/Donor Database Software • (Starting at about \$3,000)

JSI Paradigm

Price: \$2,900 for a single-user version; optional 12-month Technical Support Agreement for single-user system is \$825 (includes toll-free telephone access and software upgrades). Charges increase for multi-user versions.

By: JSI FundRaising Systems, <http://frs.jsi.com/> ; 800-521-0132. Design is modeled after index cards, with fields that can be placed and named according to preference. Documents in other formats can be directly linked to the database.

Some land trusts that use it: Eastern Shore Land Conservancy (MD), Swaner Memorial Park Foundation (UT), Columbia Land Conservancy (NY)

Technical support/Training: After installation, technical support can be purchased. JSI FundRaising Systems also offers classes.

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Comments: Two land trusts that recently selected the software said they found it to be the best match for their needs and most user friendly in this price range. Eastern Shore Land Conservancy (ESLC) uses it to track land protection as well as member/donor development. ESLC Administrative Director Nina White said the software is particularly flexible because it can link to documents in other formats, including conservation easement documents and ArcView (GIS) maps.

Donor Perfect

Price: \$2,995 for a single user; \$4,495 a network version with two users. Each additional user is \$500. Annual technical support fees vary from \$695-\$1,200, and are renewable every year.

By: SofterWare, Inc., 800-220-8111; www.donorperfect.com. In addition to storing member-donor data, and allowing users to make customized reports, features include grant-tracking, volunteer management, special events coordination, and “contact management” with reminders for individual users to complete tasks such as letter-writing, phone calls, etc.

Some land trusts that use it: Grand Traverse Regional Land Conservancy (MI), Wetlands Conservancy (OR)

Technical support/Training: Seminars offered at locations around the country; one-on-one phone training is also available. Annual technical support fees cover software upgrades, support by phone and e-mail, training and data transfer.

Comments: Grand Traverse Regional Land Conservancy implemented this software this year, after an extensive search. Comptroller Birgit Yetter said the software appeared to have similar capabilities as a number of others in the price range; the decision was based primarily on the support and service offered. Two other land trusts expressed dissatisfaction with the technical support and manuals.

Giftmaker Pro

Price: Single user version is \$2,990; three-user version \$3,990; six-user version is \$4,990. Typical systems that include software, support, training and data conversion range from \$5,000-\$8,000, according to the producers.

By: Campagne Associates, 800-582-3489; www.campagne.com. Includes prospect-tracking system, with “tasks” assigned to users for donor cultivation.

Some land trust that use it: Conservation Trust for North Carolina

Technical support/Training: Telephone training, on-site training and classroom training available. Support by phone and e-mail.

Comments: The one land trust user we spoke with had recently implemented the software, and was pleased thus far.

High-End “Off-the-Shelf” Member/Donor Database Software • (starting at \$5,000)

Raiser's Edge

Price: Starts at \$5,000 for a single-user system. Land trusts report that they paid closer to \$20,000 for multi-user systems. Optional additional modules for volunteers, special events and more start at \$1,000. The annual maintenance fee—including technical support, software upgrades, training discounts—is 20 percent of the software's list price.

By: Blackbaud Inc., 800-443-9441; www.blackbaud.com. Users describe this as one of the most sophisticated database software packages for nonprofits, with the capacity to record and sort detailed information. Features include a prospect tracking system that can generate task lists and “reminders” for specific staff or board members. Optional modules include a program that allows donors to give directly through a Web site, a module for planning, organizing and tracking fund-raising events, and increased capacity for tracking and analyzing individual donors, as well as a module for presorting envelopes and address labels.

Some land trust that use it: Natural Lands Trust (PA), Vermont Land Trust, New Jersey Conservation Foundation, The Trustees of Reservations (MA), Society for the Protection of New Hampshire Forests

Technical support/Training: Blackbaud requires its customers to acquire training—either locally, through a CD-Rom training session, or at one of its classes. The software's annual maintenance fee can be several thousand dollars. It covers toll-free telephone and e-mail support, a limited-access Web site and updated versions of the software.

Comments: “It's a very comprehensive system, so it takes a lot of training and getting used to. We're still figuring out how to use it,” said Oliver Bass of Natural Lands Trust (PA), which installed the system in 1998. “Getting such a powerful database revealed holes in our internal process for dealing with how you enter data and track people, and how you acknowledge people. It's given us the opportunity to customize our contact with donors a lot more.”

and only a few well-trained people should enter data. This was the most frequent advice land trusts had to offer. “Nothing turns people off more than getting duplicates or misspelled names,” said Tim Lagerstrom, associate director of Little Traverse Conservancy (MI). “We put a lot of time in making sure people who enter names are well-trained. The care has paid off.”

Interns once entered data for Jackson Hole Land Trust, but “a lot of avoidable mistakes” prompted the decision that two regular development staff members should handle data entry, said Ms. Jones. “Database mistakes can cost a lot of money—either by irritating donors and causing them to stop supporting your organization, or by creating a good deal of extra work for staff members who have to fix the mistakes.”

Nevertheless, it's important to capture information from a variety of sources within the organization. To do this, staff members at Natural Lands Trust (PA) fill out “contact information sheets” when they receive new information, and pass it to the person who updates the database.

- **Establish protocols for organizing and entering data; clearly define fields.** “We've learned that when we create a new field, we should make sure it will be obvious to everyone what the field represents,” said JHLT's Ms. Jones. “Many of the fields that were created by previous staff are now useless because they used random codes and acronyms, and we have no idea what they mean. Too

bad—it might have been useful information, and I'm sure the person who created the field spent a good deal of time entering the data.”

- **Keep a record of how your database is structured.** Maintain all the lists, diagrams and other materials you used to set up your database, particularly if it's custom designed. This is vital information should the database structure need to be modified in the future, noted author Michael J. Hernandez in his book *Database Design for Mere Mortals: A Hands On Guide to Relational Database Design* published by Addison-Wesley Developers Press.
- **Back it up!** One designated staff member of The Trustees of Reservations (MA) takes a back-up copy of the database home every evening—a lesson learned after two days of work was lost due to a computer system crash. While the organization had a policy to back up the database, “it wasn't clearly defined whose role it was,” said Heather Wager, director of major gifts. Now it is. (Depending on the size of the database, and how frequently it is updated, backing up material weekly or monthly may suffice.) Storing a copy off-site helps ensure that the organization's vital records won't be lost in the event of fire, flooding or other such disasters. 

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