Donor Tracking & Management Toolkit

Presented by Sophie Hanson
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INTRODUCTION
Frequently Used Terms

 Appeal

A short-term activity with a specific objective that is a specific instance of a request, such as a mailing or telemarketing event.

 Asset

A non-cash contribution that has monetary value, such as real estate, stocks, or an annuity. An asset differs from an in-kind contribution in that its longevity is generally greater than a year.

 Campaign

An orchestrated fundraising effort that lasts for a defined period of time, or a series of appeals.

 Distribution

A preset combination of a fund, campaign, and appeal (not necessarily all three) that determines how the gift or pledge is recorded. The distribution determines the income account that will be credited.

 Donation

A donation is a contribution - either a gift or a pledge.

 Donor Clubs

A means of recognizing various levels of giving by contributors. For example, an organization may designate a donor as a “friend” in recognition of contributions of $500 or more, or as a “benefactor” for donations of $1,000 or more.

 Fair Market Value

The price of a good or service on the open market. Important in fundraising because those who donate goods usually cannot take a tax deduction for more than the fair market value of the donated item; those who receive a good or service in return for a donation can usually only deduct the amount by which the value of the donation exceeds the fair market value of the good or service received.

 Fund

A legal entity within the organization with its own sets of books.
**Gift**

A payment of cash, cash equivalents, assets, or in-kind donations that has already been received.

**In-Kind Donation**

An in-kind donation is a type of non-cash contribution with market value, such as professional services, equipment, or supplies. It differs from an asset contribution because it can be expected to be used up within a year.

**List As**

An alternative way to list a contributor when the contributor does not want to be acknowledged by name. *For example,* the contributor may want their gift or pledge listed as “in the name of,” or “the family of,” or “anonymous.”

**Matching Gift**

A gift created when a donor's employer has agreed to make a matching contribution (usually a percentage of the employee's gift) when the donor makes a gift.

**Matching Plan**

A plan set up by a company to match gifts donated by its employees to nonprofit organizations.

**Memorial**

A gift or pledge made in memory of someone.

**Notification**

The acknowledgement sent to acknowledge (family, business associates, and friends) when a gift or pledge is made “in memory of” or “in honor to” their family member, business associate, or friend.

**Pledge**

A contribution to be made sometime in the future that has not yet been received. A pledge can be a one-time contribution or can be made in installments over time.

**Premium**

An incentive gift that a donor may receive for a gift or pledge, such as a coffee mug or T-shirt, in recognition of the contribution. A premium is a distribution with an assigned market value.
Soft Credit

A term used to describe a behind-the-scenes individual who helped obtain the gift or pledge, but who is not listed as the donor. Contrast soft credit with the contributor or “hard credit,” the individual who receives the actual credit for the gift or pledge.

Solicitor

An individual other than the donor responsible for obtaining a specific pledge or gift.

Split Gift

A gift or pledge that is distributed among more than one fund or that is split within a fund.

Tribute

A gift or pledge made to recognize an individual's service to an organization, cause, or some other entity.

SOURCE:  *iMIS Fundraising*  
[http://docs.imis.com/15.2/index.htm#!fundraisingterms.htm](http://docs.imis.com/15.2/index.htm#!fundraisingterms.htm)
The Donor Bill of Rights was created by the American Association of Fund Raising Counsel (AAFRC), Association for Healthcare Philanthropy (AHP), the Association of Fundraising Professionals (AFP), and the Council for Advancement and Support of Education (CASE). It has been endorsed by numerous organizations.

The Donor Bill of Rights
Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To ensure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the nonprofit organizations and causes they are asked to support, we declare that all donors have these rights:

I. To be informed of the organization’s mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.

II. To be informed of the identity of those serving on the organization’s governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.

III. To have access to the organization’s most recent financial statements.

IV. To be assured their gifts will be used for the purposes for which they were given.

V. To receive appropriate acknowledgement and recognition.

VI. To be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law.

VII. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.

VIII. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.

IX. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.

X. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

SOURCE: Association of Fundraising Professionals
http://www.afpnet.org/ethics/enforcementdetail.cfm?itemnumber=33599
The IRS adopted requirements for documenting tax-deductible charitable contributions. These rules govern the type of documentation an individual or corporation must keep to substantiate a gift to a charitable organization. In fact, if an individual makes a charitable contribution of more than $250 to an organization, that person may not claim a tax deduction for the contribution unless she has the required receipt by the time she files the tax return.

It can be difficult to square IRS rules with your standard donor recognition practices. While the donor may appreciate your eloquence, she is unlikely to make another gift if your oversight means she cannot deduct the charitable contribution.

So what should an individual or corporation use as documentation to prove that a gift is a deductible contribution? If a contribution is $250 or more, the individual or corporation is required to obtain a receipt with these three features:

- A statement that the charity received the contribution
- The amount of the contribution or a description of the property contributed
- A statement whether the donor received any goods or services in exchange for the contribution

“It is all too easy to issue a thank-you letter that is beautifully worded yet fails to contain the “magic words” the IRS requires.”

SOURCE: Internal Revenue Service
STEWARDSHIP
Steps for Effective Donor Fundraising

With The First Tee’s vision, mission and priorities as a background and a compelling case for support at the ready, fundraising follows a straightforward process:

- **Plan** – Get organized by creating a strategy and a work plan
  Effective fundraising requires a calendar of planned activities, clearly laid out areas of responsibility and preparation of necessary resources and materials.

- **Identify** – Qualify prospective donors by doing research
  Does the organization or individual have the financial resources to make a substantial gift?

- **Cultivate** – Engage the prospective donors
  Are you consciously drawing the donor closer to your organization, increasing his or her awareness of the need and increasing likelihood of a positive response?

- **Solicit** – Make the ask
  People give because they believe in your mission and because they are asked.

- **Steward** – Retain a relationship and show appreciation
  Donors should be regularly apprised of the values that their gift is adding to your organization and be given regular opportunities to be involved in your organization’s life. Stewardship is not only critical to show appreciation for current gifts, but it enables you to clearly establish a position to ask for additional and larger gifts in the future.

  Stewardship activities should include:
  - Making “thank you” phone calls and emails
  - Making personal visits with donors
  - Hosting donors for on-site tours
  - Personally inviting donors to events
  - Inviting donors to appropriate social or community events
  - Being attentive to individual donor interests
  - Paying attention to the donor and/or his/her business

Sample Gift Acknowledgment Letter

[Your logo here]

[Date]

Mr. Joe Smith
1234 Brook Lane
San Francisco, CA  94118

Dear Mr. Smith:

Thank you for your gift of $250.00 to The First Tee of [chapter name]. The impact The First Tee of [chapter name] has had on young people can be attributed in many ways to people like you who have supported our mission. We are grateful for your generosity and hope you will take great pride in the important difference your gift makes.

The First Tee’s programs here at our chapter are helping young people prepare for success in high school, college and life by

_____________________________________________________________________
_____________________________________________________________________

We hope you will continue to support our efforts as we impact the lives of young people by providing educational programs that build character, instill life-enhancing values and promote healthy choices through the game of golf.

On behalf of The First Tee of [chapter name], thank you for your investment in our young people. Together, we will shape them into tomorrow’s leaders.

Sincerely,

Executive Director or Board Member

The First Tee of [chapter name] is a nonprofit tax-exempt organization under IRC 501(c)(3). Our tax identification number is ___________. No goods or services were provided in exchange for your donation. All contributions are tax deductible.

Please consider including The First Tee of _____ in your Will or Estate Plan. Visit our website to learn more.
Sample Memorial Tribute Acknowledgment Letter

[Your logo here]

[Date]

Mrs. Joy Smith
P. O. Box 45000
Nowhere, VA 12345

Dear Mrs. Smith:

Please accept our deepest condolences on behalf of all of us at The First Tee of [chapter name].

We are writing to share with you that friends have chosen to celebrate [deceased person’s name]’s life and legacy by investing in our mission to provide educational programs that promote character development and life-enhancing values through the game of golf.

Enclosed you will find a list of donors and contact information for your convenience. We hope you and your family find comfort in what will be accomplished through these gifts and will take pride in the lives positively impacted by The First Tee of [chapter name].

Sincerely,

Executive Director or Board Member

Enclosure
Memorial Gifts
Received for [Name of Deceased]

Mrs. Jane Doe
12345 Sky Lane
Victor, PA 44455
Sample Honor Tribute Acknowledgment Letter

[Your logo here]

[Date]

Ms. Cindy Smith
245 Spain Lane
Easton, WV  23023

Dear Ms. Smith:

We are pleased to share with you that a gift in your honor has been given to The First Tee of [chapter name] by:

Mrs. Sue Brown
1234 Chester Road
Sweet, MO  34567
“In honor of your 60th birthday.”

These gifts are helping The First Tee of [chapter name] shape young lives by building character and teaching life skills that will help them in high school, college and life, using the game of golf as a platform.

Donations support our strategic initiatives, which include

_______________________________________________________________________________
______________________________________________________________________________.

One of our teenage participants had this to say:

[Participant quote]

If you have any questions or would like additional information about our programs, please don’t hesitate to contact me.

Sincerely,

Executive Director or Board Member
Sample Thank You Note

[Your logo here]

(Date)

Dear [attendee],

Just a quick note to thank you for attending our 5th Annual Charity Golf Tournament. What a gentleman and true professional you are, and I was honored to finally get to meet you in person. It was also a pleasure having someone who plays the game so well and experience your kind manner and passion for educating and helping people improve their game. Thanks for being a part of our efforts. I look forward to seeing you at our upcoming dinner meeting on the 12th.

Very best,

Executive Director or Board Member
Sample In-Kind Donation Receipt

[Your logo here]

In-kind Donation Receipt

The First Tee of (chapter name) is a (State name) nonprofit corporation, exempt from taxation under Section 501(c)(3) of the Internal Revenue Code. Our Federal Tax Identification No. is: (fill in number). The First Tee of (chapter name) has provided no goods or services in return for this donation.

Donor Name: ____________________________________________

Contact Person/Title: ______________________________________

Donor Address: __________________________________________

________________________________________________________________________

Donor Phone: __________________________

In-Kind Donation of: _______________________________________

Detailed Description of Donation: _______________________________________

________________________________________________________________________

________________________________________________________________________

Date of Donation: __________________________

Good Faith Estimate of Value: US$ ________________________(determined by Donor)

Signature of Donor: __________________________________________

We appreciate your support of The First Tee of (chapter name).

Sincerely,

Executive Director or Board Member
DONOR MANAGEMENT SOFTWARE
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<td>LOCATING AND MODIFYING RECORDS</td>
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<td>System has a “smart search” feature so user does not have to type in records by name.</td>
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<td>Users can set up data entry defaults.</td>
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<td>Separate recognition names (annual report, honor rolls, etc.) can be tracked.</td>
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<td>System allows for joint and separate giving records for spouses.</td>
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<td>Addresses/mailling name and salutations are auto-created based on a prefix and last name (i.e., Mr. Tom Jones).</td>
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<td>User can overwrite auto-created addresses/mailing names.</td>
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<td>Relationships can be tracked between records (employer/employee, board member/organization).</td>
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<td>RECORDS ADMINISTRATION</td>
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<td>System creates records.</td>
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<td>System has a group change feature.</td>
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<td>System tracks updates to records.</td>
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<td>FUNDING TASKS, ACTIONS AND COMMUNICATION</td>
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<td>System has calendar for grants and other deadlines.</td>
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<td>A tickler feature reminds users of important deadlines.</td>
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<td>User can track actions/tasks and their status.</td>
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<td>User can track correspondence and communication with prospects.</td>
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<td>GIFT TRACKING</td>
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<td>System tracks in-kind gifts.</td>
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<td>System allows for soft crediting of gifts.</td>
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<td>System tracks matching gifts.</td>
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<td>System tracks different funds.</td>
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<td>System allows for splitting gifts between funds.</td>
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<td>System tracks different campaigns.</td>
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<td>System tracks different appeals.</td>
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<td>System tracks tribute/honor gifts and their notifications.</td>
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<td>System tracks anonymous giving.</td>
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<td>System tracks individual gift acknowledgements and thank-you letters.</td>
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<td>PLEDGE TRACKING</td>
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<td>System tracks pledges.</td>
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<td>System tracks scheduling of pledge payments.</td>
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<td>System has a pledge reminder feature.</td>
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<td>MAILINGS</td>
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<td>Records have primary and alternate mailing addresses.</td>
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<td>System has mailing restrictions option.</td>
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<td>System generates automated thank-you letters.</td>
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<td>GIDDIES AND REPORTS</td>
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<td>User can create custom queries based on the Model year criteria.</td>
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<td>System has a built-in report writer/Custom report generator.</td>
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<td>System links to an external report writer (e.g., Crystal Reports or Access).</td>
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<td>System has “named reports” “how many? 60+ 60+ 45+ 43+ 10+ 10+ 10+ 10+</td>
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<td>DATA IMPORT/EXPORT</td>
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<td>Data can be exported to a spreadsheet or text file (e.g., for a spreadsheet).</td>
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<td>EMAILS</td>
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<td>User can maintain/edit custom code tables (e.g. gender and address type look-up tables)</td>
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<tr>
<td>User can create/define fields for donor information</td>
<td>Yes</td>
<td>Yes</td>
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<td>Yes</td>
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<td>Yes</td>
<td>Yes</td>
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<tr>
<td>User can create/define fields for gift information</td>
<td>Yes</td>
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<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>VOLUNTEER MANAGEMENT FUNCTIONS</td>
<td>System has capability for identifying volunteers</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<td>Yes</td>
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<tr>
<td>System tracks a volunteer's skills</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>System tracks a volunteer's availability</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>System allows for scheduling volunteers</td>
<td>Yes</td>
<td>Yes</td>
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<td>Yes</td>
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<tr>
<td>System tracks a volunteer's work time</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<td>Yes</td>
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<td>EVENTS MANAGEMENT FUNCTIONS</td>
<td>System has the capability for managing events</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>System tracks event attendees</td>
<td>Yes</td>
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<td>Yes</td>
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<td>System tracks event volunteers</td>
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<td>Yes</td>
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<tr>
<td>Strong Points</td>
<td>&quot;Very sophisticated application Interface to Blackbaud's accounting and registrar software&quot; Various add-on modules including online interface and available E&amp;O coverage and customer support</td>
<td>&quot;Intuitive interface and navigation &quot; &quot;Can be used to generate reports and graphs&quot; Summarize key data &quot;One-Clock Reporting Track and improve campaign effectiveness. A built-in accounting interface</td>
<td>&quot;Good help section Lots of reports &quot; &quot;Moderate events management system &quot; &quot;Scans tailored to each client&quot;</td>
<td>&quot;Inexpensive and unique as a suite&quot; &quot;Cash gifts are attributed to and posted directly to GL accounts&quot; &quot;Integrates with QuickBooks, popular accounting software&quot;</td>
<td>&quot;Open Source software, free service&quot; &quot;Improved and simplified version compared to the previous ones&quot;</td>
<td>&quot;Exceptional support&quot; &quot;Offered planning giving and research tools&quot; &quot;Free for nonprofits with under 500 records&quot;</td>
<td>&quot;Free up to 10 users&quot; &quot;Ininitely customizable&quot; &quot;Robust reporting engine&quot;</td>
</tr>
<tr>
<td>Things to note</td>
<td>&quot;Expensive&quot; &quot;May require dedicated server depending on configuration&quot; &quot;Takes extensive and expensive training to use system to fullest potential&quot; &quot;Not suitable for small nonprofits&quot;</td>
<td>&quot;Many of the action, task, and communication functions are not very advanced&quot; &quot;Expensive for more than one user&quot;</td>
<td>&quot;Navigation may be confusing for some users&quot; &quot;Training classes offered in limited timeframes to only those with a support contract&quot;</td>
<td>&quot;Company is relatively new to the market&quot;</td>
<td>&quot;Not supported by some software&quot; &quot;Support not very formal&quot;</td>
<td>&quot;The lack of a smart search function can make looking-up records difficult&quot; &quot;Queries &amp; reports don't have much flexibility&quot; &quot;Requires a lot of set-up, e.g., defining tax ID user fields&quot;</td>
<td>&quot;Built as a sales tool, donor management template is relatively new&quot; &quot;Should not be considered ready-to-use software&quot; &quot;Full to use with capabilities, must invest in knowledgeable consultant to help customize&quot;</td>
</tr>
<tr>
<td>Volunteer Tracking Feature</td>
<td>Yes (optional)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Events Management Feature</td>
<td>Yes (optional)</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Some</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Initial Cost</td>
<td>$6500 and up</td>
<td>$2,500 for single-user license $4,500 for multi-user upgrade Note: DonorPerfect Online is also available as an ASP at $100/month (1 user, 1,000-2,500 accounts) with a setup fee of $299</td>
<td>$1299 for a 3 User License</td>
<td>$50 annual membership. Optional modules available. Version with tapestry is recommended $149</td>
<td>Up to 500 Records - $31/month and up</td>
<td>Up to 10 users - $1500/year</td>
<td></td>
</tr>
<tr>
<td>Documentation</td>
<td>User's guide provided with software</td>
<td>User's guide provided with software</td>
<td>Comes with manual and online help, help button in system</td>
<td>User's guide provided with software</td>
<td>Available on the website (pdf or Microsoft Word)</td>
<td>eTapestry offers online start guides and online help.</td>
<td>Currently, no donor management specific documentation.</td>
</tr>
</tbody>
</table>
Seven Tips for Choosing the Right System

How should you narrow down the choices and focus on the packages likely to work best for you? There are a number of important considerations:

**Don't over-prioritize price.**

First off, don't let minor differences in price be a big factor in your decision-making. Saving money is important to every non-profit, but a few hundred dollars shouldn't dictate your fundraising future. Instead, factor in the time you'll save by using a more efficient system - for instance, simply being able to more easily print customized letters and send emails can save a lot of time. And better communications, more information about your donors and campaigns, and more support for effective prospecting - paired, of course, with an effective fundraising strategy - can help bring in thousands of dollars more a year even for small organizations. Which means the system pays for itself over time.

**Make a plan for all your constituents and interactions.**

Donors are just one piece of the puzzle. Think through all the people your organization interacts with on a day-to-day basis - and all the ways you interact with them, both online and off. Then make a plan for how you'll track data about them. Ideally, you'd be able to see an all-in-one-place overview of everything a person does with your organization. This might mean tracking all the data in one system, or being able to integrate data from multiple systems together. But don't purchase a donor management system without understanding how it will fit into the larger picture.

**Understand your own donor processes.**

Some organizations use very specific fundraising processes. Others are more experimental. It's important to understand how you work in order to assess a system's fit. Do you want to be able to move prospects carefully through a series of stages and priorities? Is it important to be able to flexibly query to find any set of potential prospects under the sun? Do you need a lot of pre-packaged reports, or would you rather be able to create your own? There are lots of good systems, but better understanding your own needs can help you find the system that's best-suited to you.

**Identify your communication priorities.**

The systems vary considerably in their support for creating mail-merged letters and sending email. Some are only really good at one of these. Others fare poorly at both. Think through your needs in this area and determine what's important to you. (Keep in mind, though, that very few of these systems support broadcast emailing as robustly as even inexpensive specialist systems in these areas like Vertical Response or Constant Contact. It may be more cost-effective and efficient to use such an external program in tandem with your system.)

**Estimate your numbers now - and in the future.**

How many donors do you plan to store in the system? How many staff members will be using it, now and three years from now? The cost structures vary a lot between different systems, so one that is cheap now might not be if you double your number of donors. One that's a bit of a stretch now could turn into a wise investment if it easily scales to support many more donors and users with little extra cost.
Weigh flexibility versus complexity.

It can be tempting to prioritize a system that allows you to continue to work in exactly the way you always have - and the flexibility to add custom fields and custom interactions can be useful. But often, a new system provides a great opportunity to rationalize and streamline your process, and potentially bring it closer to existing best practices. If you can map your process to standard practices, you'll likely be able to use a cheaper and less complex system.

Consider the priority of accounting control.

Some of the systems offer very little in the way of features to reconcile your gifts with your accounting systems. Others require you to consider accounting batches, or even accounting funds, every time anyone enters a gift. Some offer a mix, or can be set up how you want. What will work best for you?

A Solution Tailored to Your Needs

The tips outlined above, along with other information in our detailed Consumers Guide, will help you understand the available tools and narrow your search to a handful of options. As we note in the guide, you'll want to take a careful look at those systems yourself before making a final decision. Think through your needs carefully - which of the features described are critical for you? Which are only nice to have, or not useful for your organization? What other features, which aren't discussed here, might be useful?

With that list of important features in hand, contact the vendors and ask for demos. Ask them to show you exactly the features you consider important. Consider giving them a script which walks through the tasks you'd like to see demoed - for example, "I add a gift to the system, and then create a thank you letter." This can be very useful to help compare different systems to each other.

Study the system carefully - does it seem like something your staff can, and will, use? Does it mesh well with the type of fundraising you do? If it feels like the system or the vendor just doesn't "get it," that's an important sign that the system isn't the right fit for you.

There are a lot of good products available, and each option has its own strengths and weaknesses. It doesn't matter how good a particular system is if it doesn't fit your organization's needs. With these considerations in mind, and some careful research, you can find a system that will help you be more efficient and effective fundraiser.

SOURCE: Techsoup
http://www.techsoup.asia/en-AU/content/Choosing-a-Low-Cost-Donor-Management-System
Back Away From That Spreadsheet: Why Excel Isn't a Donor Database
By Robert L. Weiner, August, 2009

Quick, easy, and you already have it. Excel seems like it might be a great fit to manage your donor data. But just back away from that spreadsheet – there’s a lot of reasons why it’s not a good idea.

Every nonprofit organization needs to keep track of donors and gifts. Many of the small nonprofits I’ve worked with started out using Excel. It seems like a good idea at the time: you already have a copy of the software, you know how to use it, and it’s quick and easy. But resist that urge. Put down that spreadsheet and get a database that is designed to track donations.

Excel is great with numbers, and can track small groups of prospects or activities. But it has some critical limitations. Most notably, Excel stores information in what’s called a “flat file” database. This means it’s not designed to handle relationships between data, such as when one record (like a donor) needs to link to several other records (like gifts). And it doesn’t provide a wide variety of features that make tracking efficient and less error prone. What does this mean for you in practice?

- Similarly, you have to add a new column for every new piece of contact information; even if only one person on your list has three email addresses, you will need three email columns.

- You cannot easily link pledges to payments, or track “soft credits” such as crediting individuals for corporate matches or gifts made through their family foundations.

- Tracking relationships is an important aspect of major gifts work, and can help with foundation and corporate fundraising. Excel is not designed to track relationships between constituents, such as spouses with separate records, members of households, or employment relationships.

- My personal Fourth Law of Thermodynamics says that databases will turn to piles of mush (to use the technical term) without constant vigilance. Wherever possible, the database itself should help you with this task. For instance, it should only allow users to enter real 2-character State codes for U.S. addresses, only allow legitimate fund codes and appeal codes, require that U.S. area codes have three numeric digits, and keep letters out of numeric fields. Excel does not provide a rich array of tools to maintain data integrity.

- Excel will not notify you of upcoming tasks, like a tickler to remind you to follow up with a prospect, submit a grant application, or send a birthday card. Nor will it alert you to move someone to a lifetime giving club when their cumulative donations reach over $X (e.g., $100,000). It can also be cumbersome to analyze
Excel data for complex patterns, such as looking for donors have given for over five years, have a cumulative giving level of over $10,000, and attended more than two of your events.

- Security, reporting, and ad hoc query options are limited. Anyone who can update your spreadsheet can update everything. It is easy to hit the wrong key and accidentally delete or change data. If you don’t catch an error right away, you better have a good, recent backup on hand.

- Finally, if your fundraising program is successful, your spreadsheet can grow impractically large. Spreadsheets with thousands and thousands of records become hard to view, print, or manipulate.

I have seen clever people develop workarounds for many of these issues. But they were often complex and not something a casual user could do. An enormous, complex spreadsheets that is so delicate that only one staff member can touch it doesn’t provide the infrastructure an organization needs for successful fundraising.

Your donor database should be your institutional memory. It should make it easy for you to look up donors, view giving histories, understand relationships, and analyze trends. It should help your fundraisers work more effectively. It should be an aid, not a chore.

I recently saw a webinar advertised by a database vendor with the marketing tagline, “Friends don’t let friends use Excel to manage fundraising campaigns.” I agree. Excel is a great tool, but it is not a donor database.

RESEARCH
Top 6 Websites for Free Donor Research

You're in the throes of beginning a fundraising program for your nonprofit. You may not be able to hire a donor prospect researcher to prepare detailed information about your donor prospects, but you can start pulling together some basic information just with some time and patience.

1. **Zabasearch.com**
   You can verify someone's address and telephone number using this database. Enter the first and last name of your prospect. If the name is really common, such as John Smith, you can limit your search by state.

2. **FoundationCenter.org**
   You can get a foundation's tax return through this database. This is very helpful if you are looking for grant possibilities. I plugged in The Ford Foundation and came up with address, email, website, assets, total giving, even the EIN number. There is also a lot of additional information at this site including lists of top funders. There is a Foundation Directory to which you can subscribe for a reasonable price.

3. **Finance.Yahoo.com**
   Let's say you have a prospect in mind who runs a big public company, or you know that a prospect owns a lot of stock. At this site, you can get a stock quote and other information such as the stock's dividend and its 52-week range. You might want to ask for a gift from a donor when a stock he owns is at its high. I looked up Ford Motor Company at this site and found all the info I needed about that company's stock.

4. **Zoominfo.com**
   This is where to go for biographical information about a prospect. I plugged in Bill Gates name for fun and got page after page of information and links. I put my name in and got information that was very similar to what came up on zabasearch.com, and it was not very up-to-date. This search site will work for well known individuals but less well for the average person.

5. **Sec.Gov**
   You can find the salaries of the top officers of a public company at this government site. The trick is to enter the parent company...for instance, Citigroup Inc. is the parent of Citibank, which I entered. On the next page you can enter the type of report you want. The DEF 14A is the "definitive proxy," so I entered that. On the next page were several 14A's--I clicked on the most recent and got another list. I chose ddef14 and then scrolled to a list of names and compensation for 2005.

6. **Salary.com**
   You can find out a person's salary if she works at a private company at this site. You won't find that person's salary specifically but you can find incomes by job title, and then narrow that to a geographic location. Look for a job description that resembles what your prospect does, and you'll see base pay and even bonuses. I plugged in Advertising in Oakland Calif., and then picked Account Executive. I clicked base salary and got a nice chart that indicated the median salary.

Prospect Research

1. **iWave Information Systems** – makers of PRO Prospect Research Online
   28 Hillstrom Avenue
   Charlottetown, PE
   Canada C1E 2C5
   *Used by The First Tee home office to research Trustee and Major Donors
   
   Lisa Rayner, Client Services
   Direct Line: 1.800.655.7729 Ext. 11
   Email: lisa.rayner@iwave.com
   www.iwave.com
   
2. **DonorSearch.Net**
   11245 Dovedale Court
   Marriottsville, MD 21104
   
   Nick Jamison, Client Relations Manager
   Direct Line: 410.670.4114
   Office: 410.670.7880
   Email: nick@donorsearch.net
   www.donorsearch.net
   
3. **Wealth Engine**
   4330 East West Highway
   Bethesda, MD 20814
   
   Phone: 301.215.5980
   E-mail: info@wealthengine.com or jwoolf@wealthengine.com
   www.wealthengine.com
4. **Target Analytics, a Blackbaud Company**  
2000 Daniel Island Drive  
Charleston, SC  29492  

Jenny Townsend Robinson  
Senior Account Executive  
Phone:  843.654.3243  
E-Mail:  jenny.robinson@blackbaud.com  
www.blackbaud.com  

5. **Foundation Directory Online**  
(Provides details available on U.S. funders and their grants)  
Phone:  (800.424.9836  
E-Mail:  fdonline@foundationcenter.org  
http://fconline.foundationcenter.org
RESOURCES
Recommended
Donor Management Software Products
&
Packaged Pricing

1. **eTapestry Cloud Fundraising by Blackbaud**
   6107 West Airport Blvd.
   Greenfield, IN  46140
   *The First Tee Corporate Partner*

   D J Johnson, Senior Account Executive
   Jeremy S. Vanscoy, Sales Manager
   [www.blackbaud.com](http://www.blackbaud.com) or [www.etapestry.com](http://www.etapestry.com)
   Phone:  317.336.3902 or 317.336.3988
   E-mail:  [dj.johnson@blackbaud.com](mailto:dj.johnson@blackbaud.com)
   E-mail:  [Jeremy.vanscoy@blackbaud.com](mailto:Jeremy.vanscoy@blackbaud.com)

   For YouTube overview, click here:  [eTapestry Overview](http://www.etapestry.com)

Three Packages:  Starter, Essentials, Pro
*Discounts Available (8% off Starter, 10% off Essentials, 12% off Pro)*

*Online Merchant Services*

Has its own that integrates directly into eTapestry

**Fee: 2.6% (26 cents per transaction)**
*Exclusive for TFT only – American Express charges at no additional cost*

-------------------------------------------------------------------
Pricing on next Page(s)
# eTapestry Cloud Fundraising Packaged Pricing

<table>
<thead>
<tr>
<th>Plan</th>
<th>Price</th>
<th>Features</th>
</tr>
</thead>
<tbody>
<tr>
<td>STARTER</td>
<td>$99/month</td>
<td>- Web-based Fundraising and Constituent Management Database</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Unlimited Users License</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Up to 1,000 records</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Mobile Access</td>
</tr>
<tr>
<td>ESSENTIALS</td>
<td>$199/month</td>
<td>- Web-based Fundraising and Constituent Management Database</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Unlimited Users License</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Up to 5,000 records</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Document Attachment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Executive and Benchmarking Reporting</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- MS Outlook Email Integration</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Mobile Access</td>
</tr>
<tr>
<td>PRO</td>
<td>$399/month</td>
<td>- Web-based Fundraising and Constituent Management Database</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Unlimited Users License</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Up to 15,000 records (additional records can be added)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Document Attachment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Executive and Benchmarking Reporting</td>
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<td></td>
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<td>- MS Outlook Email Integration</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- National Change of Address</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Role-Based Security and Admin</td>
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<tr>
<td></td>
<td></td>
<td>- Mobile Access</td>
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</table>

### Online Fundraising

<table>
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<tr>
<th>Plan</th>
<th>Features</th>
</tr>
</thead>
<tbody>
<tr>
<td>STARTER</td>
<td>1 online fundraising form* 25,000 emails + eMarketing reports**</td>
</tr>
<tr>
<td>ESSENTIALS</td>
<td>3 online fundraising forms* 50,000 emails + eMarketing reports**</td>
</tr>
<tr>
<td>PRO</td>
<td>5 online fundraising forms* 100,000 emails + eMarketing reports**</td>
</tr>
</tbody>
</table>

### Training and Support

<table>
<thead>
<tr>
<th>Plan</th>
<th>Features</th>
</tr>
</thead>
<tbody>
<tr>
<td>STARTER</td>
<td>Email Support Chat Support Unlimited On Demand Training</td>
</tr>
<tr>
<td>ESSENTIALS</td>
<td>Email Support Chat Support Unlimited On Demand Training Instructor-Led online classes</td>
</tr>
<tr>
<td>PRO</td>
<td>Email Support Chat Support Unlimited On Demand Training Instructor-Led online classes</td>
</tr>
</tbody>
</table>
2. **DonorPerfect Fundraising Software (SofterWare, Inc.)**  
132 Welsh Road, Suite 140  
Horsham, PA  19044

Cheryl Brennan, Sales  
Chad Kashub, Client Account Manager  
[www.donorperfect.com](http://www.donorperfect.com)  
Phone:  800.468.6689  
Email:  cbrennan@donorperfect.com  
E-mail:  ckashub@donorperfect.com

Product/Company Info  
Why DonorPerfect Online [www.donorperfect.com/DPOvalue](http://www.donorperfect.com/DPOvalue)  
DonorPerfect Online Virtual Tour [www.donorperfect.com/OnlineTour](http://www.donorperfect.com/OnlineTour)  
Brochure [www.donorperfect.com/brochure](http://www.donorperfect.com/brochure)  
DonorPerfect Clients [www.donorperfect.com/references](http://www.donorperfect.com/references)

-----------------------------------------------------------------------------

Pricing on next Page(s)
## DonorPerfect Packaged Pricing

<table>
<thead>
<tr>
<th>Feature</th>
<th>Express</th>
<th>Essentials</th>
<th>Premier</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Base System Includes</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unified Constituent Database</td>
<td></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td><em>Donors, Volunteers, Members, Event Participants, etc.</em></td>
<td></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Contact Management</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Fundraising Mgmt. &amp; Development</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Donation &amp; Pledge Tracking</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Direct Mail &amp; Personalized Communication Tools</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Powerful Filtering &amp; Targeting Features</td>
<td>✓</td>
<td>✓</td>
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</tr>
<tr>
<td>Comprehensive Donor Reporting</td>
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<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Sophisticated Campaign &amp; Fundraising Analysis</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>User-based Security</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Word, Excel, &amp; Outlook Integration</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Daily Backups &amp; Restore</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Mobile App for iPhone / Android</strong></td>
<td></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Included Training &amp; Support Tools</strong></td>
<td></td>
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</tr>
<tr>
<td>Database Customization With Our Staff</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>System Hosting &amp; Maintenance</td>
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<td>Regular Product Updates &amp; Enhancements</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>Monthly E-Tips</td>
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<td>✓</td>
<td>✓</td>
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<tr>
<td>Online Knowledgebase</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>On-demand Training Videos</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Regional Classes, On-site Training &amp; Instructor-led Virtual Training</strong> are available with additional fee.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Plus</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unlimited Constituent Forms</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

**NEW**

- **Express**: $59/month for First 1,000 Records
- **Essentials**: $154/month for First 5,000 Records
- **Premier**: $264/month for First 25,000 Records
<table>
<thead>
<tr>
<th>Feature</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Template Web Forms for Collecting Online Donations, Pledges, Mailing Lists, etc.</td>
<td></td>
</tr>
<tr>
<td>Integrated Credit Card/ACH Processing <em>(One-time &amp; recurring)</em></td>
<td>✓</td>
</tr>
<tr>
<td>Advanced Data Import Tool</td>
<td>✓</td>
</tr>
<tr>
<td>Constant Contact Integration**</td>
<td>✓</td>
</tr>
<tr>
<td>SmartGive Online Donations &amp; Registrations</td>
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</tr>
<tr>
<td>Custom Report Designer</td>
<td>✓</td>
</tr>
<tr>
<td>Email Acknowledgement / Receipting</td>
<td>✓</td>
</tr>
<tr>
<td>Events Management</td>
<td>✓</td>
</tr>
<tr>
<td>Hosted File Attachment Storage</td>
<td>✓</td>
</tr>
<tr>
<td>QuickBooks Integration</td>
<td>✓</td>
</tr>
<tr>
<td>SmartActions Business Rules</td>
<td>✓</td>
</tr>
<tr>
<td>Advanced Batch Entry</td>
<td>✓</td>
</tr>
<tr>
<td>Merge Purge/Direct Mail Segmentation</td>
<td>✓</td>
</tr>
<tr>
<td>Moves Management</td>
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</tr>
<tr>
<td>Multi-Currency Tracking &amp; Conversion</td>
<td>✓</td>
</tr>
<tr>
<td>Multi-site Advanced Security</td>
<td>✓</td>
</tr>
<tr>
<td>Order Premium Management</td>
<td>✓</td>
</tr>
<tr>
<td>XML-API</td>
<td>✓</td>
</tr>
<tr>
<td>Unlimited User Upgrade</td>
<td>$10 $39 $99</td>
</tr>
<tr>
<td>Full Support Plans</td>
<td></td>
</tr>
<tr>
<td>- Live Phone, Email &amp; Chat Support</td>
<td></td>
</tr>
<tr>
<td>- Pre-Release Enhancements</td>
<td></td>
</tr>
<tr>
<td>- 30 Day Data Insurance™ Safety restore any backup from the last 30 days</td>
<td>$19 $34 $69</td>
</tr>
<tr>
<td>Premium Support Plans</td>
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<tr>
<td>Includes everything in Full, plus:</td>
<td></td>
</tr>
<tr>
<td>- Toll-free (800#) Phone Support</td>
<td>$24 $43 $93</td>
</tr>
<tr>
<td>- 24-hour Emergency Support</td>
<td></td>
</tr>
<tr>
<td>- 2 Hours or Less Response Time</td>
<td></td>
</tr>
<tr>
<td>One-Time Setup Fee</td>
<td>$95 $495 $995</td>
</tr>
</tbody>
</table>
3. **GiftWorks by Mission Research**  
355 East Liberty Street, Suite 201  
Lancaster, PA 17602  
Cheryl Keener, Sales  
Phone: 717.431.0200 ext. 113  
Toll Free: 888.323.8766 ext. 113  
E-mail: cheryl.keener@giftworksconnect.com  
Twitter: @GiftWorks  
www.giftworksconnect.com

Free 30-day trial available  
One-time fee **per license**  
Four editions: Standard, Premium, Pro and Anywhere (cloud based)  
Smart Plan available: $39/month includes 6 hours of training & free upgrades

-----------------------------------------------

Pricing on next Page(s)
## GiftWorks Packaged Pricing

### Powerful Features, Affordable Price...

<table>
<thead>
<tr>
<th>Plan</th>
<th>Description</th>
<th>Price</th>
</tr>
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<tbody>
<tr>
<td><strong>GiftWorks Standard</strong></td>
<td>Installed on your computer</td>
<td>$549</td>
</tr>
<tr>
<td><strong>GiftWorks Premium</strong></td>
<td>Installed on your computer&lt;br&gt;<strong>Standard features PLUS role-based security, seasonal addresses, extra custom fields, file storage, and USPS discounted mailings</strong></td>
<td>$649</td>
</tr>
<tr>
<td><strong>GiftWorks Anywhere</strong></td>
<td><strong>Every GiftWorks feature</strong>&lt;br&gt;<strong>GiftWorks Volunteers</strong>&lt;br&gt;<strong>GiftWorks Events</strong>&lt;br&gt;<strong>Unlimited Phone and Email Support</strong>&lt;br&gt;<strong>Five GiftWorks University Courses Premium, Volunteers, and Events</strong></td>
<td>$75 Set-up per user&lt;br&gt;$75 per month per user&lt;br&gt;1 Year Commitment — Then month to month</td>
</tr>
<tr>
<td><strong>GiftWorks Events</strong></td>
<td><strong>Event Management Add-in</strong></td>
<td>$299</td>
</tr>
<tr>
<td><strong>GiftWorks Volunteers</strong></td>
<td><strong>Volunteer Management Add-in</strong></td>
<td>$199</td>
</tr>
<tr>
<td><strong>GiftWorks Online Donations</strong></td>
<td>Online donation — easily collect and transfer donations into GiftWorks</td>
<td>$149 Set-Up + $29.99 per Month</td>
</tr>
<tr>
<td><strong>GiftWorks SmartPlan</strong></td>
<td><strong>Unlimited Phone Support</strong>&lt;br&gt;<strong>Free GiftWorks University Courses</strong>&lt;br&gt;<strong>Free Upgrades to GiftWorks Standard and Premium Editions</strong></td>
<td>$39.99 per Month for 1 – 3 users&lt;br&gt;$59.99 per Month for 4 – 6 users&lt;br&gt;$79.99 per Month for 7 – 9&lt;br&gt;$99.99 per Month for 10 + users&lt;br&gt;2 Year Commitment — Then month to month</td>
</tr>
<tr>
<td><strong>GiftWorks University - Single</strong></td>
<td>One in the Series of Five Courses</td>
<td>$79</td>
</tr>
<tr>
<td><strong>GiftWorks University - Series</strong></td>
<td>Complete Series of Five Courses</td>
<td>$349</td>
</tr>
<tr>
<td><strong>GiftWorks Data Protect</strong></td>
<td>Online backup for your GiftWorks information</td>
<td>$4.99 per Month</td>
</tr>
<tr>
<td><strong>GiftWorks Web Collect</strong></td>
<td>Online information collection tool&lt;br&gt;<strong>Discounts available for multiple forms</strong></td>
<td>$14.99 per Month</td>
</tr>
<tr>
<td><strong>GiftWorks Custom Import</strong></td>
<td>Transfer your organization’s information into GiftWorks</td>
<td>$3K — $5K Average&lt;br&gt;This service requires a quote</td>
</tr>
<tr>
<td><strong>GiftWorks CASS/NCOA Cert</strong></td>
<td>Address verification</td>
<td>$149 — Up to 20K addresses&lt;br&gt;$199 — Over 20K addresses</td>
</tr>
</tbody>
</table>

Prices effective as of November 2011 and are subject to change.
4. **Salesforce.com**

Jesse Maddex, Account Executive, Nonprofit Solutions

Phone: 415.836.3952  
Mobile: 415.602.0806

[www.salesforcefoundation.org](http://www.salesforcefoundation.org)

**Salesforce.com Foundation Discount**

**FREE up to 10 licenses** for 501(c)(3) nonprofit organizations

80% discount for additional licenses

*Salesforce Foundation offers a free product to nonprofit organizations; however, there are channeling partners that offer set up services and add-on tools for an additional cost (see pricing below).*

**CHANNELING PARTNERS**

**Sales Adoption (set up and reporting services)**

Kevin Jordan, Managing Consultant

Phone: 888.635-4566

Email: kevin@salesadoption.com  
[www.salesadoption.com](http://www.salesadoption.com)

Sales Adoption offers Salesforce implementation services for Nonprofits that have chosen to implement Salesforce Foundation’s Nonprofit Starter Pack (NPSP). Sales Adoption can help The First Tee Chapters implement this donor management system and has already provided similar services for The First Tee of the Triangle.

**Cost: 36-hour implementation service (usually $3,700) with 33% in-kind grant to lower the investment to $2,479**

**Click & Pledge (add-on Tools)**

Willie Jester, Business Development & Sales

Phone: 540.961.9811 Ext. 3224

Mobile: 619.889.6291

Email: willie@clickandpledge.com  
[www.clickandpledge.com](http://www.clickandpledge.com)

**Offers Exclusive Discount to The First Tee Chapters**

Pricing on next Page(s)
Exclusive for The First Tee

FREE Online Fundraising Tools. FREE Salesforce Donor Management. FREE Mobile Platform. FREE Event Management.

Now, join over 10,000 non-profit organizations worldwide that take advantage of the comprehensive yet free platform of custom online fundraising, mobile giving, event management and donor management software tools.

NEW! The only mobile credit card reader that directly links to Salesforce Donor Management.

Online Fundraising Tools – The most comprehensive suite of tools and support available including:

- Unlimited Custom Forms, Mobile Phone Donations/Website, Registrations, Ticketing, Name Badges, Data Base, Pledge TeeVee Video Giving, Shopping Cart, Races & Walk Fundraising, Payment Gateway Integration, Recurring Payments, API, PCI security Compliant, E-Mail thru Constant Contact/Mail Chimp, and more.

Donor Management – Salesforce.com CRM Integration

- We’ve made it easy to install and use the Salesforce.com Donor Management System. Features: one access point for data, 360 degree donor/volunteer view, recurring payments, over 80 non-profit reports/dashboards, virtual payment terminal, auto receipts, emails, custom designer....all integrated with our payment gateway.

Event Management – Salesforce.com Integration

- Delivers the ability to increase revenue and participation through events. Web-based features include: Create, set-up and manage events, promote through creating unlimited custom webpages complete with text, images, videos, embedded registration forms, payments and live reporting.
Mobile Presence – Expand Your Campaign by Going Mobile...plus, introducing our new QR-PayCard.

Click & Pledge offers a mobile giving web-based platform that provides a comprehensive mobile presence for all clients without installing or maintaining apps. Patrons may now visit your mobile website and make donations or pay for events all through a mobile browser. Scan A Personal QR-PayCard With A Smart Phone and Make A Donation/Payment. Easy, Convenient, Secure.

No Limits on payment amounts. Capture all donor information. Direct deposit of funds within 24-48 hours.

**Free Customer Support** – Friendly, knowledgeable support is available by toll free phone, online email, online live chat, support suite, support forum, “How-To” videos and live webinars.

**Pricing:**

Premium Merchant Banking services are PCI secure. You receive a merchant account, automatic direct deposit of funds within 48 hours, a competitive rate with free customer support. Supports online, card scan and mobile card scan transactions.

Process Visa, MasterCard, Discover, American Express Credit/ Debit Cards.

ACH e-checks.

No Set-Up. No Monthly Fee.

2.75% plus .15 Cents per transaction
1.85% plus .25 Cents per check transaction.

Non qualified cards are assessed a 1% surcharge; American Express add .75 cents per transaction to above fees.

Click Here for Complete Pricing Details: [http://clickandpledge.com/Pricing/index.asp](http://clickandpledge.com/Pricing/index.asp)

**Call Us Toll Free: 866-999-2542 ext. 3214**

**Visit online:** [www.ClickandPledge.com](http://www.ClickandPledge.com)
Email Marketing Services

2013 Best Email Marketing Service Comparisons and Reviews
http://email-marketing-service-review.toptenreviews.com/

1. **Constant Contact**
   1601 Trapelo Rd. Suite 246
   Waltham, MA. 02451
   (866) 876-8464

   Apps and Integration:
   http://marketplace.constantcontact.com/AppsSearch?query=&sort=rating
   &need=&industry=&attribute=&page=7

   Apps and Integrations can help you:
   - Grow your email list
   - Update contacts between your Constant Contact account and other applications
   - Make your website or social media presence more effective

*Integrates with the following donor management software products:
Salesforce (free)
eTapestry
DonorPro
Giftworks
Click & Pledge (free)
Quick Import to Outlook (free)
Infotransfer to Intuit® and Quickbooks® (free)

2. **iContact**
   2450 Perimeter Park Drive
   Suite 105
   Morrisville, NC 27560
   (877) 820-7837

   Offers a 20% discount to all non-profit organizations outside of North Carolina. Send 501(c)(3) to billing@icontact.com to confirm your non-profit status.

3. **Blackbaud NetCommunity Spark** – integrates with Raiser’s Edge
   (800) 443-9441

   With Blackbaud NetCommunity Spark, your website comes to life through:
   - Unmatched email communication and online fundraising tools
   - Advanced online giving options
   - Online event management and registrations
Do You Need A New Donor Management System?

Download a step-by-step Decision-Making Workbook (by Techsoup)

http://www.techsoup.org/learningcenter/databases/page12882.cfm
FUNDRAISING ASSISTANCE
Home Office Contacts

Dan Brady
Senior Coordinator, Network Operations
Telephone: (904) 940-4361
Email: dbrady@thefirsttee.org

*Chapter Matching Grant Program

Will Bratton
Senior Coordinator, Outreach
Telephone: (904) 940-4313
Email: wbratton@thefirsttee.org

*NSP and DRIVE Programs

Chris Decent
Associate Director, Leadership Gifts
Telephone: (904) 940-4357
Cell: (904) 347-0162
Email: cdecent@thefirsttee.org

*Beyond The Fairway, Annual Giving, Chapter Fundraising Best Practices

Guy Garbarino
Vice President, Outreach
Telephone: (904) 940-4359
Cell: (904) 535-7453
Email: ggarbarino@thefirsttee.org

*NSP and DRIVE Programs

Sophie Hanson
Senior Coordinator, Donor Management
Telephone: (904) 940-4348
Email: shanson@thefirsttee.org

*Donor Management

Luke Layow
Director, Principal Gifts
Telephone: (904) 940-4356
Cell: (904) 347-0742
Email: llayow@thefirsttee.org

*Major Gifts,
*Board Development & Fundraising

Megan Long
Development Associate, Annual Fund
Telephone: (904) 940-4336
Email: mlong@thefirsttee.org

*Corporate Relationships

Joe O’Brien
Vice President, Chapter Education and Opportunities
Telephone: (904) 940-4328
Email: jobrien@thefirsttee.org

*Board Governance & Fundraising
*Board Development & Fundraising

Tony Powell
Director, Outreach
Telephone: (904) 940-4335
Email: tpowell@thefirsttee.org

*DRIVE Program

Jennifer Weiler
Vice President, Strategic Alignment and Development
Telephone: (904) 940-4309
Cell: (904) 382-8133
Email: jweiler@thefirsttee.org

*Trustees
Mission
To impact the lives of young people by providing educational programs that build character, instill life-enhancing values and promote healthy choices through the game of golf.

Together we can!