

Information on Databases

Inexpensive Packaged Tools:

- **GiftWorks** (www.missionresearch.com): A traditional, locally installed database starting at \$299 per computer. Their focus on ease-of-use makes the tool easy to get going and right out of the box. The core product is focused on managing gifts and donors, but they offer an extension to track volunteers as well for an additional \$199. Windows only.
- **eTapestry** (www.etapestry.com): A fairly full featured online donor database. It is free for up to 500 constituents and \$35/month for up to 1000, but goes up rapidly in price after that. It is primarily targeted at managing donors, but user-defined and category fields make it usable for other types of constituents as well. Web-based.
- **DonorPerfect** (www.donorperfect.com): DonorPerfect is based around, well, donors, but also has some support for members, volunteers, and other contacts. Their installed version is a bit beyond the price range of this “low cost” article, but they offer an online hosted version for a reasonable monthly fee, which may be worth considering for organizations more comfortable paying “rent” over time rather than a lump “purchase” price.
- **Salesforce.com** (www.salesforce.com): A high-end online relationship management database that is offered free to 501(c)3 nonprofits with up to 10 users. The software was originally targeted at corporate sales organizations, but it has a substantial commitment to the nonprofit sector, and is used by a sizable number of nonprofits. There is a growing body of templates to allow basic to mid-level features for tracking donors as well as other constituents. With training, a knowledgeable user, perhaps with consulting help, can adapt it for organizational use. Salesforce has an open architecture which encourages clients and community members to build, share, and even sell modules which plug into the core database functionality.
- **Democracy in Action** (www.democracyinaction.org): An online database for \$100/month for up to 3000 constituents and \$200/month for up to 25,000 (setup \$100- \$200). They offer basic constituent management features that are integrated with more powerful email, online donation, and advocacy features. DIA is intended as more of toolset and less of an out-of-the-box solution than GiftWorks or eTapestry. Web-based.
- **Microsoft Access** (<http://office.microsoft.com/en-us/access/HA101672561033.aspx>): Click on the link to view the demo for more information.
- **FileMaker** (www.filemaker.com/): Used to track volunteer data, manage mailing list, maintain donor information, manage grants and funding, create and manage surveys, and organize volunteer contacts. Manage customers, clients, and vendors; Track inventory, products, and assets; Organize pictures, video and other multimedia files; Access project details and associated tasks; Print invoices, letters and mailing labels; Produce reports in PDF or Excel formats; Create customized electronic forms that look just like your paper forms; E-mail the contents of virtually any field with a single click; View live Web information associated with your data from within FileMaker; Share databases with Windows and Mac users simultaneously over the network or across the Web.

- **iMIS** (www.advsol.com/AM/Template.cfm?Section=Home6): Customer Management was designed to be highly flexible to meet the precise needs of organizations, with many setup options that allow organizations to tailor the user experience to the needs of individual staff users. Customer Management's features include: Contact management; Activity tracking; Committee management - facilitating the organization of, recruiting, and communication with committees and officers; Demographic management; Communication management.
- **Donation Solutions** (www.donationsolution.com/DS/index.aspx): Donation Solution is a powerful, comprehensive application capable of handling your email fundraising campaigns, email lists, member recruitment, and event planning and volunteer resources. Features the following: Gift and pledge tracking; Contact management; Corporation database, grant management; Prospect management; Volunteer Coordination; Special events coordination; E-mail campaigns; Donor/Volunteer database; Newsletter development; Direct mail campaigns; Donor summary report; Year-end donor report; Volunteer report; Gift report; Pledge report; Event report; Prospect report
- **DonorAccess** (www.donoraccess.com): Tool consists of Unlimited addresses, phones, emails, webpages; Automatic mail merges, lists and labels; Employer, education and membership info; Solicitations schedule, tracking and history; Quick info reports, prospect profile reports; Pledge tracking, matching gifts Memorials, sub-campaigns; Daily batch reports, campaign reports, year-end reports; Reservation, payment, attendee lists; Volunteer lists and schedules; Event schedule and budget reports; Skill/availability matching queries; Volunteer schedules; Yearly total volunteer-hour reports; Grants Information and status forms; Grants status and results reports
- **Donor Records** (www.execdata.com): Donor Records is a comprehensive donor tracking resource that has helped non-profits of all types communicate their unique message to raise community awareness and to raise more money to support their programs. To this end, Donor Records lets you track: Individuals (prospects, donors, major contributors, etc.), Foundations (current or potential grantors, grants pending, etc.), Organizations (direct contributions and/or matching gifts) and Memorials/tributes (with appropriate acknowledgments).
- **Easy-Ware** (www.easy-ware.com): One fully-integrated, single solution, all one database, no "modules;" Powerful ad-hoc, phonetic and saved searches; Task-specific data entry; Quick look ups; Critical Notes & Reminders pop up instantly; Flexible family structure; Unlimited custom data fields of any type; Integrated word processor for sophisticated form letters; One-click batch thank you letters; Quick access to contact history; Integrated group e-mail; Fully customizable; User-specific defaults; Intelligent most-recently-used list; Prints envelopes, labels, letters on demand; Quick tasks mimic different work modes; New Record Wizard for speedy data entry; Exports to Word, Excel, Text, HTML, and more; De-duping tools; Batch entry; Batch printing of groups of reports; Associate unlimited photos to people or groups; Calendar view of data; QuickBooks extract; Intelligent security/privacy; WealthEngine™ interface; Displays map and driving directions to any address with one click; Auto dialer

- **Telosa Exceed/Exceed! Basic** ([www.telosa.com/prodTelosa Exceeducts/index.html](http://www.telosa.com/prodTelosa%20Exceeducts/index.html)): See Donor Management Comparasion Chart
- **FundRaiser Basic** (www.fundraisersoftware.com): FundRaiser Basic is an affordable, feature-rich donor management software package that streamlines your administrative activities, giving you more time for fundraising. More importantly, it provides you with the tools to help you identify and understand your organization's giving patterns so you can develop strategies to improve them. Generate automated acknowledgments and receipts for each donation to foster solid donor relationships. Manage all of your donor correspondence within the built-in word processor using customizable letter templates. Simplify printing of labels and envelopes with integrated address merge functions. Quickly generate and print a selection of donor and donation reports. Easily combine queries with reports to track event and campaign effectiveness
- **LifeLine** (www.straightforwardsoftwareinc.com): LifeLine is an affordable constituent management system for tracking donors, donation, pledges, memberships, prospects, volunteer hours, and staff and board members. Define your own mailing, status, donor, solicitation, group and interest codes, and thousands of financial account codes for tracking donations and pledges. Track multiple addresses for each constituent. Define an unlimited number of sub-groups of your constituent list. Create export files for use with your word processor. Print custom lists, mailing labels, financial and pledge reports.
- **Membership Director** (www.ads-software.com): Handles many administrative functions - basic membership information, notices of dues expiration, receiving dues and contributions, committees, attendance, awards, association history, member interests, former members. 43 prepared reports - lists, summaries, analysis, membership cards, financial reports, etc. Mailing labels. Extensive Help available online.
- **Membership Management System** (www.linkedsoftware.com): Featured include: Schedule and report appointments; Instantly design and customize your own reports; Schedule unlimited events; Report event attendance; Assign unlimited member profiles and dates; Powerful new import and export capability; High speed data entry window for repetitive money transactions; Automatic file conversion/upgrading from older versions of MMS; Automatically charge members' credit cards; Track members, families and donors; Write personalized letters and post cards; Automatic (and optional) backups and/or backup prompts; Print mailing labels, ID cards and name tags; Track donor gifts and pledges; Display dramatic graphs of member pledges and contributions; Define unlimited dues categories; Bill member dues automatically; Send e-mail; Print donor statements and reports; Print dues statements and reports
- **MemberTies** (www.myrro.com/memberties/index.htm): All of the basic contact information is available, including the complete name, photograph, company name, address, email, telephone, website, occupation/job title, reference, etc. In addition, MemberTies Professional allows for unlimited addresses per membership record, and even allows you to assign a date range within

which each address is valid so the system can automatically keep track of the "current" address. MemberTies (standard version) lets you enter the dues amount and date paid, the membership status purchased, and additional comments. Once you have set up your dues information, you can also use the Dues Calculator to figure the amount of dues owed for a given status for a given month. Credit card information can also be stored per member for one or more cards. If your club recognizes members for their achievements, tracks offices or positions held, or just needs to know when someone was involved in a particular type of activity, you can record it using membership or club "Items." Items are used as a generic way of describing all of the "things" your members can be involved in. The ToDo List feature in MemberTies enables you to track ToDo items for any membership or club record, or for yourself. You can print your outstanding ToDo list, display future items, and of course, mark them as done as you complete them. MemberTies enables you to assign each membership record to any number of clubs; that means you can actually keep track of the membership of several clubs and run reports specific to a particular club's membership, or for all members combined -- all in the same database! MemberTies lets you track activities, where they take place, times, dates, and general notes. No membership system is complete without reports, so we provide a complete set of predefined reports, including rosters, mailing labels, dues payments, statistics, birthday lists, contact lists, individual member and club reports, and more. Many reports can be customized to show only certain membership statuses, dates, etc., or can be restricted to limit membership records to those assigned to a specific club. Send email to any of your members or club, or the attendees of any activity. You can even create an "email merge" by formatting your email message with fields from the database. If you have existing membership data in another program, just export your data to a delimited text file, and you're ready to map each of your existing fields to fields in MemberTies! All data to be imported is displayed for you before it is sent to the database, so you will know just what is being imported. If you need multiple people to access the database at the same time, additional seats may be purchased for your license. After that, all you need is TCP/IP support on the "server" computer, and setting up additional users is a simple process. All data is stored in a relational database, and full backup and restore options are included within the program. The system will automatically prompt you to backup the database at the interval you specify, or leave you alone to do it manually.

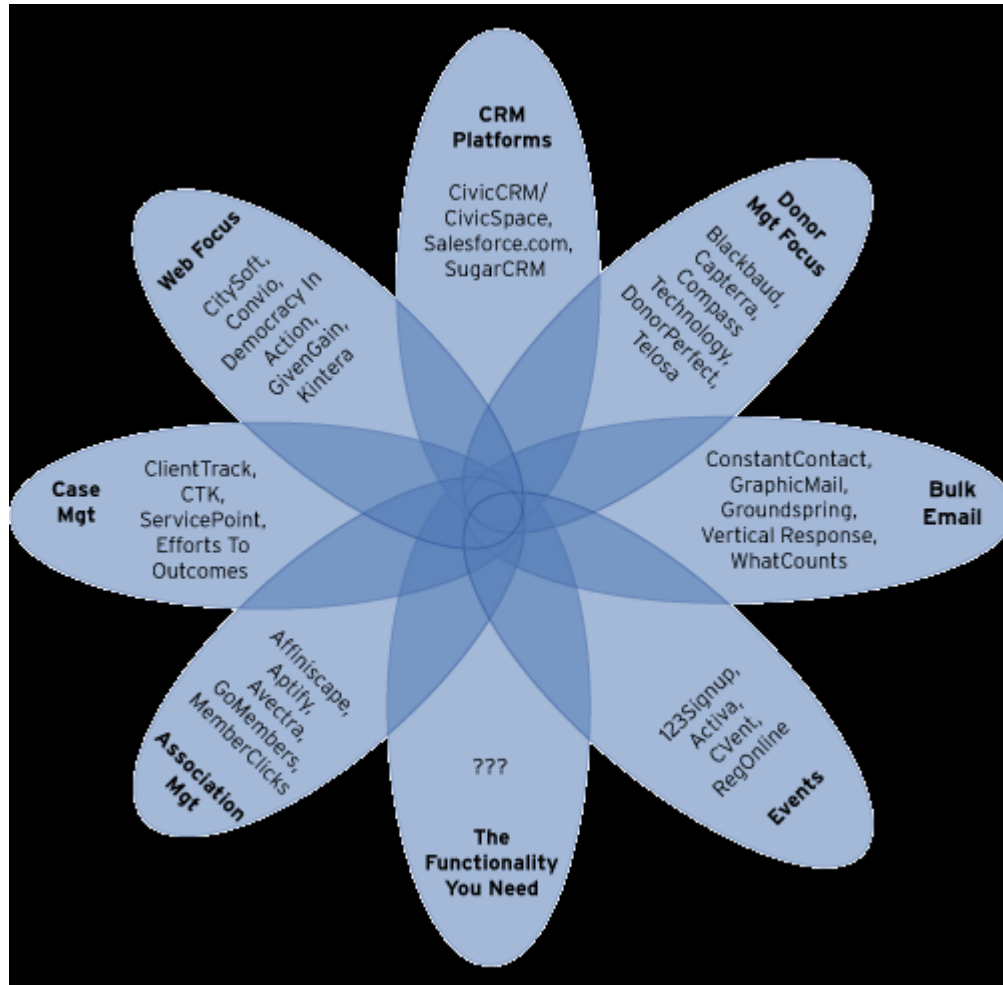
- **Sage Fundraising 50** (www.sagenonprofit.com/products/fundraising/paradigm): See Donor Management Comparison Chart
- **Wild Apricot** (www.wildapricot.com/): Customize your database fields according to the organization's needs; Wild Apricot allows organizations to: rename or delete existing fields, add your new fields and specify which ones are optional vs. mandatory, and define which fields are shown on the member application and on the member profile page. In addition, search by name, email, company, membership status, join date, etc. Our powerful contact management features allow you to keep computerized notes on member interactions. Differentiate between free subscribers, basic members, gold members and sponsors and identify all members with pending renewals. Send notification of membership renewal and adhere to current privacy regulations, allows for members to opt out of receiving member e-mailing
- **Blackbaud (Raiser's Edge)** (www.blackbaud.com): See Donor Management Comparison Chart

- **CitySoft (www.citysoft.com):** Includes the following features: 3-Step wizard for creating pages; Graphical Site Map of pages in the system; Layout templates allow users to store and reuse page layouts; HTML templates allow users to store and reuse HTML code; Web editor allows non-technical users to create web pages or technical users to create HTML; Articles module for easily publishing articles and news releases; Powerful and flexible website search engine makes your content easy to find; Channels that allow non-technical users to integrate a wide range of forms, interfaces, and other dynamic content (e.g. a calendar of events) into web pages; Workflow feature that enables distributed, approval-based publishing; Scheduled publishing and expiration of pages; and Styles management that allows styles to be created and used in web pages
- **Convio (www.convio.com/site/PageServer):** Convio offers two Web content management solutions, Convio PageBuilder and Convio Content Management (CMS). Convio CMS is a full-featured content management system and powers many of the most sophisticated nonprofit Web sites in the country. This solution is recommended for organizations with advanced Web site needs and multiple content contributors. Convio CMS provides a Web content platform that combines content types, content relationships and integrated eCRM components to effectively drive your Web site initiatives. Convio PageBuilder empowers non-technical staff with easy-to-use content management tools and is designed for micro-sites and organizational Web sites with fewer pages and contributors. Including a WYSIWYG environment, Convio PageBuilder provides organizations with personalized and conditional content capabilities, Web page management, access restriction and re-usable components. PageBuilder also enables organizations to easily integrate fundraising, team events, advocacy and other engagement efforts with their Web content.
- **Kintera (www.kintera.com):** Includes the following features: Create highly flexible and customizable contact, donation and registration forms to collect pertinent data on your constituents; group individuals into households with aggregated profile and financial information; manage multiple sets of custom addresses for each constituent. Set dates indicating when an address is effective to ensure your communications get delivered; select from 30 standard salutations or create custom salutations to ensure appropriate personalized greetings in your communications; record all online and offline purchases and gifts, both single and recurring. Pledges can be managed to track individual giving periods, schedules, and amounts. Track soft credits to recognize those who helped bring in the pledge; centrally record your constituents' online and offline activities. Define custom activity types. Enter notes about interactions and manage tasks associated with that constituent; identify relationships between constituents such as church member/congregation and track relationship dates and details; use the simple Search feature for common fields like Last Name, or an Advanced Query Tool (available with Kintera CRM only) which allows you to build and save complex queries built against any field; use simple folders to create and save segments and mailing lists based on profile, behavioral, and other data categories. Constituents are added to segments while you edit their record, when they submit forms, or when they meet criteria you define; create and organize custom fields for constituent records. Capture standard and custom profile data through customized online and offline forms.

Free Databases for the Tech Savvy:

- **Organizer's Database** (www.organizersdb.org): A basic installed open-source database that is quite small in file size and works well on older equipment. It has strong contact management functionality, and a new version adds more support for donor tracking. Those with Access knowledge can customize and extend the software. Detailed documentation and training available. Windows only, but it does not require you to have Microsoft Office installed. Click on the following link for further information: <http://organizersdb.org/files/odbfeatures.pdf>
- **Metrix** (metrix.fcny.org): Metrix is a flexible open-source database geared to manage all the “interactions” between you and your constituents. It's built on Microsoft SQL Server, with an Access front-end. It's designed to be customized and extended by someone with substantial Access skills. It has somewhat more features than Organizer's Database, and thus takes a bit more time to learn. Windows only.
- **CiviCRM** (www.civicrm.org): An open-source online contact manager that integrates tightly with the popular Drupal and Joomla Content Management Systems. The integration means that you can manage web site users and constituents at once, adding to the community-building side of contact management. This tool has enough sophisticated functionality for many organizations to use it as is, but is extensible by someone with PHP skill. Most organizations will need a skilled technology professional to get you up and running. Alternatively, CivicSpace On Demand offers those without technical expertise a hosted alternative, which allows you to get CiviCRM, Drupal, and more for \$50/month.
- **Ebase** (www.ebase.org): Although this open-source tool looks simple, ebase provides you with a set of robust and powerful tools to help you with: contact management, prospect and donor tracking, volunteer management, gift and pledge management, easy to use find features that makes complex queries simple, email broadcast list management, web site integration with your contact management system, response analysis, exporting and importing data, flexible structure for easy maintenance and modification, and creating letters, labels and envelopes.

Databases tend to have different focus areas:



http://www.idealware.org/articles/crm_software.php

Sources:

- http://www.idealware.org/articles/fgt_low_cost_dbs.php
- <http://www.techsoup.org/learningcenter/databases/page4798.cfm>