Fundkit

Donor Software Needs List for Best Practices

Data Tracking

- Donor Records should have category types: Household, Business, Foundation, Educational Institution, Government Agency, etc. when, once established, will grow very little.

- Track donor groups such as: Current Board, Former Board, Current Staff, Former Staff, Current Committee 1 Member, Current Committee 2 Member, Former Committee 1 Member.

- Track volunteer information as needed by the organization (activity, hours, etc.).

- Track inactive and deceased records.

- Track records that should not be mailed.

- Track records that should not be solicited.

- Track event attendance, and "guest of" if applicable.

- Track mailings received by each constituent.

- Track various notes for constituents that can be pulled into a query function.

- Track various tasks or actions for constituents that can be pulled into a query function.

- Track donor development committee activity.

- Assign donors or specific donations to particular solicitors (Year End Appeal, Campaign Committee, Donor Development Committee).

- Allow for linked relationships between records.

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Reporting

- Monthly reconciliation with finance

- High level analysis of data should be a common function such as:
    - LYBUNT/SYBUNT (lapsed donor reports)
    - Total Org vs. Household vs. Foundation giving
    - Cumulative giving over a given & changeable period of time
    - Donor renewal rates

Here are some queries/reports that will be specific to your organization:
- Constituents added in the last 3 years with no donation history
- Any constituent with giving in the last 5 years OR added to the database in the last 3 years.

Support

- Access to software help – web forums, email or phone support

- User Group support, interaction with other users of same software

- Maintain a document for regular database cleanup/hygiene activities

- Maintain a document for gift processing and evaluate it yearly (who processes mail, donations, acknowledgement letters)

Integration

- Integrate with a mail merge function for acknowledgement letter processing

- Online giving tool that potentially integrates with donor software

- Integration with email tool