

Benefits of a System Assessment

Historical Context

Historical Context: Software applications dedicated to managing donor relations and gifts to nonprofit organizations have been around since the 1980s. Lots has changed since then, not the least of which is advances in technology. Nonprofit organizations, and the way they do business, have evolved as well. As an industry, nonprofits experience higher turnover among staff than most businesses. And within nonprofits, the development office/fundraising staff turnover even more often than other positions.

Problem

Problem: Sometimes your software system becomes like a dusty, jumbled, overfilled attic in your house. As a result of long-term use, or even short-term use by a variety of staff in successive positions, the donor management database can become outdated, obsolete, disorganized, and cluttered with stuff you no longer need. All of which gets in the way of stuff you really do need. It may be hard to tell who your best supporters are. Donor's records may be linked to inactive relationships, or coded as interested in obsolete programs. Information may be recorded in multiple places, making it impossible to accurately group donors together by common factors such as giving ability or geographic region. As new fundraising initiatives are implemented, or as leadership or organizational vision change, or as the marketplace simply and inevitably moves forward (online fundraising, social networking), old ways of tracking donors and donations don't keep pace. The storage system – your attic – that's supposed to make your house more livable is actually making it less comfortable. The dust is giving you allergies, the size of the mess means house-keeping's never done, and the clutter keeps you from bringing in new furnishings. All of which means you can't successfully accommodate family and guests.

Solution: Discovering all the ways your database is underperforming can be intimidating, or even impossible. Sometimes you don't know (or are afraid to find out!) what you don't know. But you DO know that performing regular tasks to meet development office needs is frustrating and time consuming. A thorough evaluation of how the database is functioning, along with a systematic and objective study of your organizations' historic, current and future processes and needs will fill in the blanks. Once roadblocks to data-management success are identified, they can begin to be dismantled, getting your back on track.

Solution

The System Assessment

The System Assessment: A system assessment methodically researches the organization's data-management needs, identifies challenges to organizational success, and outlines recommended steps for remediation. The research includes in-depth discussion with all stakeholders in the data management and fundraising process, as well as hands-on diagnostics of actual data. A written report outlines problems as well as solutions and identifies resources needed to achieve success. Steps to improving data management and therefore effective fundraising can be implemented immediately, be they simple changes to workflow or more comprehensive overhaul of database configuration. If lack of up-to-date user training is an identified gap, the assessment will have created a specific, tailored training plan designed to get fundraisers and admins functioning at top potential straightaway.

Why Capital Business Solutions: CBS has been a leader in providing software services for two decades (chances are, as long as or longer than you've had your system!). In that time, our consultants have developed a broad experience level with literally hundreds of nonprofits in dozens of sub-industries, as well as a deep working knowledge of their designated systems. Many of our people have practical experience in the field in addition to technical knowledge of their product. In other words, we've just about seen it all, from both sides of the table. Our consultants develop a strong one-on-one relationship with clients: you'll work with the same individual from assessment through recommendations, remediation and training. That means there's no need to re-explain issues from one stage to the next. And our consultants are invested in getting you to the finish line, not just to the hand-off point to another department.

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Want to know more? Contact us at (888) 249-6008