**Client/Donor Relationship Management Databases 2021**

Rayna’s Proposal June 2021

Joellen Notes: Looked at DonorPerfect, stay within $1500 - $2000, no longer than a year contract

\*\*General Notes:

* Ensure you are searching under TechSoup ***Canada -*** Defaults to US
* Constituent Relationship Management (**=*CRM***)
* Donor Relationship Systems (***=DRS***)

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| Product | Cost | Description | Main Features: | Questions / Pros & Cons |
| DonorPerfect | $47 - DISCOUNTED  (one year, multi user, more than 500 unique records)  $131 - DONATED (one year, multi user, ***less than 500*** unique records) | Product ID: G-50141  This offer provides access to a **15 percent discount for new users** on any one-year DonorPerfect Online subscription at current rates. After you request this offer through TechSoup, you'll pay DonorPerfect directly for the discounted subscription.  Offers support? Yes - basic through website, extra is available to purchase  Product ID: G-50142  This donation provides a one-year subscription to DonorPerfect Online for an unlimited number of users with a **maximum database size** of 500 records  Budget:  Organizations with annual operating budgets of $150,000 or less are eligible for donated products in this program.  Organizations with annual operating budgets under $2 million are eligible for access to discounted rates products in this program.  Offers support? Yes - basic through website, extra is available to purchase  <https://www.donorperfect.com/fundraising-software/features/> | * Manage constituents * Track gifts and grants * Process donations * Create reports * Integrate with third-party software: like Word and Excel. * Work from your mobile device | Pros:   * Multi User friendly * On sale * Works with mobile devices * Microsoft Integration   Cons:   * 500 record cap - could outgrow too quickly |
| Arreva - Exceed! (Version: Basic 4.5)  Techsoup | $74 - DONATED (one year, with multiple users but only one cas access at a time)  $473 - DISCOUNTED (one year, with multiple users but only one cas access at a time) | Product ID: G-48670  Add Ons:   * Technical support packages. Arreva technical support is supplied only through a separate contract. ($150/$350/$450 on Sale) * Multi-user upgrades for organizations that need two to five concurrent users. (**Additional $150 per concurrent user**)   Organizations with annual operating budgets of $50,000 (USD) or less are eligible for the donated products in this program.  Organizations with annual operating budgets of more than $50,000 and less than $500,000 are eligible for discounted products in this program.  Suggested:  ExceedFurther  Professional  **First 1,000 records**  Households & Organizations  Gifts & Pledges  Unlimited Donation Webpages  Recurring Donations  Online Pledges  Online Tributes  Donors Can Pay Processing Fee  Peer-2-Peer Fundraising  Donation Leaderboard  Email Communications  Reporting  QuickBooks Integration  ConstantContact Integration  DonorSearch Integration  Double the Donation Integration  Email Technical Support  Phone Technical Support  DNS Setup  <https://www.arreva.com/exceed-system-requirements>  Offers support? No - Unless purchased | * Donor management * Donation tracking * Reporting * QuickBooks integration * Email marketing integration - VerticalResponse (send up to 10,000 emails per month at no charge) * Constant Contact to transfer email addresses and other important information between that service and Exceed! Basic. * Office/Outlook integration | Pros:   * Choose 2 Add-on Modules:   + Events   + Campaigns   + Members   + Volunteers   + Grants * Multiple unique system integrations and Quickbooks & Microsoft integration   Cons:   * No tech support unless purchased in addition * Costly for concurrent users |
| Canada Helps | 1000 contacts or less $99/month  (Includes all DMS features, access to our extensive online learning materials and phone/email support)  \*\*Larger DB sizes available, costs reflect # of records stored | Conveniently import historical donor data for a complete view of your fundraising efforts.  Robust advanced search allows you to dig into key donor information and contribution details quickly and easily.  Send donor communications including thank you emails, segmented campaigns, and newsletters.  Easily issue CRA compliant tax receipts to donors based on their contributions.  Raise more with low payment processing rates that meet the needs of small charities.  Generate reports and use custom filters to uncover key insights and share with external stakeholders. | * Gather and access all of your data in one place for a 360° view of your donors. * Streamline your stewardship. Spend more time on your mission. * Gain a better understanding of your donors * Easily aggregate and manage your donor data; * Improve your stewardship and cultivate donor relationships; * Increase donor retention through data-driven decisions; and * Be more efficient and effective so your organization can spend more time fulfilling your mission. | Pros:   * They are equipped to support large record DBs and their pricing is fair * We are already associated with canada helps and familiar with their platforms * Good reputation and likely easier to find information for troubleshooting purposes as it is a well known and widely used service * Includes online learning materials and phone and email support * Simple and user friendly * Con: The downside is that none of this process is integrated with your **off-line** methods of receiving donations and there is no integration of the donor information with any other systems. |
| Salesforce | Offers reduced monthly rates for eligible nonprofits  Sales & Service Cloud Enterprise Edition + Nonprofit Success Pack (NPSP) - $48USD / month - includes 10 free subscriptions | Nonprofit CRM from Salesforce.  With Nonprofit CRM software by Salesforce, organizations are able to create and cultivate long-lasting relationships with constituents. Using the software, you can reach more donors, create stronger relationships with supporters, better engage with communities, and streamline internal processes to make more time for the important work of helping clients.  Nonprofit CRM helps you collect an accurate, unified view of every interaction with clients, supporters, members, funders, volunteers, and affiliates. With this access and knowledge, your team can boost your outreach, improve donor and volunteer management, and organize your programs and campaigns. Plus, nonprofits can get many Salesforce products at a deep discount.  ………………….  *It’s Free!*  *Salesforce Foundation has a great program where they provide ten licenses (or user logins) to eligible nonprofits at no cost. However, there’s a pretty common phrase consultants use to describe the real costs of Salesforce implementation.*  *It’s free like puppies.*  *Salesforce entices you with free offerings, but it is a much larger cost to run successfully than they want you to think.*  *Your organization will need to invest in either a dedicated Salesforce administrator or consultant to ensure that things are set up properly. Salesforce consulting firms peg this cost at roughly between $20,000 to over $100,000, depending on the size of the project. Unfortunately, there’s a lot that the standard nonprofit setup of Salesforce won’t have, such as online donation forms, built-in payment processing, automated acknowledgments, or a nonprofit-focused connection to Quickbooks.* | * Get a complete view of all involved. * Raise more resources. * Customize communications. * Work better together. * Boost productivity. | Pros:   * Offers interesting savings opportunities * Popular and widely known and used by a variety of companies   Cons:   * Is not a full solution, we would likely have to purchase additional software integrations to meet our needs such as payment processing. |
| Microsoft - Dynamics 365 | $1432- DISCOUNTED | \*\*Most *sustainable*, expensive startup costs and long term commitment. They DO have an online version of this however it is not currently offered through tech soup and there is a storage cutoff. **Microsoft team takes care of the backend with the online version.**  Dynamics 365 for Customer Service (On-Premises) User CAL - **$199 per additional user** to remotely access the server from a personal device.  Under the Software Assurance program, you have the right to install any new release of products covered in the agreement during the term of your coverage.  Benefits of on-premise server: you have full control and access to CRM tools from work or home. | * Manage Donors and Donations * Create Reports * Import Data * Track Correspondence * Deploy a Knowledge Base | Are we prepared to purchase additional hardware and software to operate with an on-site server?  Do we have someone who can set up and take care of the backend of the server/money to train an existing staff?  Good read to help understand the difference between CRM software and **CRM on-premise servers.** [**http://www.kbstraining.com/blog/microsoft-dynamics-crm-tutorial.htm**](http://www.kbstraining.com/blog/microsoft-dynamics-crm-tutorial.htm) |

In Closing:

* Savings opportunities and multi-user friendly through DonorPerfect
* Adequate database size for our needs with room to grow through Arreva, Exceed!
* Reasonable prices with a good database size and a recognized interface we are familiar with through Canada Helps
* Potential savings opportunities, great multi-user platform and widely recognized platform through Salesforce
* (**on premise** or online [*currently not offered through techsoup]*) Ample room to grow and create sustainable, fully customizable systems that meet our unique needs - long term opportunity MicrosoftDynamics365

Rayna’s Recommendation:

Taking cost, overall tools needed as well as their ease of use into consideration, I think that at this time we should focus on a trusted, basic service that offers the tools and support we need to really understand and gain efficiency using these services. I recommend going with the Canada Helps Donor Management System as it is already a platform we are familiar with, they have fair pricing for a decent database size, and they are a recognized entity that offers a variety of direct and user-community support that could be useful when operating and troubleshooting their system and its tools.

Joellen’s Recommendations: I agree with Rayna’s recommendation to purchase Canada Helps Donor Management System for $100/mo or $1,200 plus tax annually.