Project Plan for: Donor Management System

Project description

This project is to assess your current donor management system and/or processes and to evaluate, purchase, and deploy a new solution. Whether you're currently using a dedicated donor management system or using spreadsheets to keep track of donors, this project will allow you to get to the next level.

Why take this on / what impact to expect:

If you complete this project, you can expect some or all of the following benefits to your staff and organization:

- A better understanding of your donor management needs through review of your current processes
- A better understanding of your need for training on an existing donor management system, if applicable
- An improved system for tracking and understanding your donors, their areas of interest, and giving patterns
- Reduced time to perform common practices such as creating donor thank you letters and running reports
- A tool to help inform your fund development strategy

Estimated project timeframe: 2 - 12 weeks

You'll likely be on the shorter end of the timeframe if it's determined that training on your existing donor management system is what's needed, and on the longer end if you're selecting and implementing a donor management system for the first time.

Project deliverables

At the end of this project, you will have:

- A donor management system up and running for your organization (or improved upon)
- Training for at least one staff person on how to effectively use your donor management system
- Documentation on how to get technical support for the new system
- Donor data migrated from an existing system to a new one, to the extent necessary
- An understanding of how the donor management system can be a tool in your organization's fund development strategies

Project milestones & who leads:

The major steps involved in executing this project and who leads them are below. Keep in mind there may be more sub-tasks than what's noted here, but these are the major steps:

Milestone	Who leads?
1) **Assess current state** a. If you have a current donor management system in place, ask key users/ stakeholders (including your staff and board members) what works well and what does not about current system. b. If you *don't* have a solution in place, discuss what your current needs and pain points are around donor management processes, and how this project may help you address them. Ask your staff and board members to weigh in. c. Consider if there are trusted donors who you can ask for input on their current experience as a donor to your organization. d. What are your fundraising and donor development goals for the next few years? How might a donor management system help you address them? e. What are the primary ways you want people to be able to donate? i. On your website?	Your org

ii. At events?
   iii. Via special campaigns?
   iv. Via peer-to-peer fundraising campaigns/challenges?
   v. Other?	

2) Create requirements/define your needs based on your assessment results
  a. Based on the above, create a list of "must-haves" & "nice-to-haves" of the features you need/want in a new donor management system. i.e., *What must the solution do, from where, and for who?*
  b. What data/information do you need the system to track? What reports do you need it to easily produce?
  c. Will the donor management system need to interface/integrate with any existing solutions? If so, list them.
  d. What resources does your org have available to help you implement and maintain this solution?
	Your org

3) Explore options
  a. Referring to the requirements you defined above, evaluate potential solutions and vendors that offer what you need – use the list below as a starting place
  b. Reach out to your peers and find out what they use and what their experiences have been
  c. If possible, demo/trial different solutions to understand how they work
  d. Consider customizations you might need beyond what the system offers "out of the box" or "off the shelf" – and keep in mind the added costs these bring
  e. Review the training and support offered with each solution
	Your org

4) Choose solution, install, and train
  a. Sign up for a subscription-based donor management system that includes training and support
  b. Ensure all needed elements of the system are installed and tested
  c. Review customization that was discussed and ensure it's working properly
  d. Set up a training plan for staff to ensure they can successfully use the system
  e. Test support procedures to ensure quality support is readily available
  f. If applicable, import existing data into new system
	Your org and/or solution vendor

Estimated project budget:

If you follow the approach outlined in this project plan template, we estimate the project budget to be as shown below. Please keep in mind this is only an estimate and final cost will vary based on your choice of solutions/vendors, # of users, etc.

Description	Cost per month	# of months	Est. budget
Donor management system subscription fee	$30-$300	12	$360 - $3,600 annually
Import data from existing system (if applicable)			$1,000 - $5,000
TOTAL			

Potential solution providers/vendors for this project:

While the Nonprofit Support Program does not endorse the vendors/providers below, our work in the community indicates that many of your peers have used the vendors below for similar projects. It's essential that you research and fully evaluate solutions and vendors against your specific project requirements to ensure a good fit. We've recommended additional resources to help with that under "Learn more before you decide," below.

- Little Green Light
- Kindful
- DonorPerfect
- Bloomerang
- Bonterra

Consider utilizing a Catchafire volunteer to help with select elements of your project implementation. More information about available Catchafire technology projects can be found [here](#).

Learn more before you decide:

To learn more about how to evaluate these solutions/vendors before you proceed, consider the following resources:

- *What's New in Donor Management Systems*
- *Choose the Right Donor Management Software*
- *8 Questions to Ask When Choosing a Donor Management System*

Related considerations:

While you're working on this project, it is a good time to also consider the following:

- Are you looking for a Constituent Relationship Management system (CRM) that tracks your *clients and program data* as well? Some donor management systems offer that. Learn more about full-featured CRMs:
  - 5 Key Differentiators to Look for in Your Nonprofit CRM
  - Which customer relationship management CRM software is best for your nonprofit?