MAP CUBE

RECOMMENDATIONS TO IMPROVE DEVELOPMENT PROCESS AND OUTCOMES

PREPARED FOR
MICHIGAN ABILITY PARTNERS
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MAP: Recommendations to Improve Development Process and Outcomes

Prepared for Michigan Ability Partners

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Executive summary

Michigan Ability Partners (MAP) is a social services agency providing housing, vocational, and financial services to homeless, disabled, and ex-military clients in Washtenaw and Jackson Counties. MAP emphasizes training and skills for independence, and is primarily funded through grants and fee-for-service arrangements. MAP wishes to diversify its funding sources to include more private donations, and asked Cube to provide recommendations about how the agency can better manage donor contact information in order to improve development with a particular focus on the agency's largest event, the annual Dreams by Design (DxD) fundraising dinner and auction.

Cube conducted a series of interviews with MAP staff and used findings from these interviews to create models that illuminate the agency's development process and provide useful and implementable recommendations to improve contact information management and fundraising overall. The result of this work is four findings, explored at greater length in the following pages:

- **MAP has duplicate development processes.**
  - Solicitation processes for in-kind and cash donors are separate but highly similar.
  - Separate processes create risk duplicate solicitations will confuse some donors.
  - These processes should be consolidated into a single workstream.
- **Duplicate contact lists create inefficiency and risk donor confusion.**
  - Staff members spend hours each year consolidating previous years' contact lists.
  - There should be a one-time effort to consolidate these lists to avoid contact duplication and eliminate this work in future years.
- **There is no formal tracking of time-sensitive and recurring contact-related processes.**
  - Staff members rely on their own memories to complete time-sensitive DxD tasks.
  - MAP should create a calendar to keep track of timed and recurring tasks.
- **Donor history information is limited.**
  - There is not a reliable record of how individuals and organizations targeted for fundraising are related to MAP.
  - MAP should track donors' relationships to MAP, as well individual interactions with donors and the interactions' outcomes.

Additionally, the appendices explore adjunct findings that are outside of the project scope but may still help improve fundraising.

- Digital media provides low-cost ways to expand MAP's development reach.
- Significant time is spent deciding how to solicit specific donors.

Background

Michigan Ability Partners (called "MAP" for short) is a social services non-profit based in Washtenaw County that provides housing, vocational, and financial services to approximately 1,000 clients yearly in Washtenaw and Jackson Counties. Its target population includes individuals who are veterans, are experiencing homelessness, are disabled, or have a history of substance abuse. MAP is unique in that in addition to the services that it offers, it also runs a program (REACH) that owns and maintains housing units in which MAP can place clients who may have difficulty arranging housing with other landlords.

MAP's explicit focus is to help its clients take ownership of their own situation rather than to do things on its clients' behalf. For example, MAP offers workshops in which clients learn to create a resume and apply for jobs, but it encourages clients to submit their own applications. Another example of this involves the construction of housing: MAP had a project through which clients helped to build units, thereby helping clients gain valuable experience in addition to adding to the units available to MAP's clients.

Funding for MAP's services primarily comes in the form of government grants and fee-for-service payments. Donations to MAP account for only a small fraction of MAP's budget (approximately 5% in recent years), with a majority of these funds being raised from ticket sales, sponsorships, and a silent auction at MAP's annual Dreams by Design (DxD) fundraising dinner.

MAP asked Cube to evaluate how the agency stores contact information used for fundraising and outreach and provide recommendations that can improve development efforts, with a particular focus on the annual DxD event. In recent years MAP has faced cuts in traditional funding sources and has had to scale back some programs. The organization's leadership would like to diversify MAP's funding sources and make the agency more financially secure by putting additional emphasis on private fundraising and improving its development processes.

MAP currently divides its DxD fundraising into three separate processes, with each process maintaining its own set of contact information: a process for corporate donors who give large cash gifts, a process for corporate donors who give goods or services to sell at the DxD auction, and a process for individual attendees who buy tickets to the dinner. One person manages cash gifts and DxD ticket sales, while another person manages in-kind donations. The manager of each process sends letters to businesses and event invitations to individuals asking for support. MAP staff or board members may then follow up on these letters with a phone call. Businesses who give a gift receive a thank-you note from MAP, while individuals who make large cash donations receive tickets to the event. Outside of DxD, MAP also sends periodic email newsletters to constituents and holds specific appeal campaigns that are targeted at high-value donors. These efforts are smaller and less process-heavy than DxD fundraising.

Cube identified several areas in which MAP excels. First, and perhaps most prominent, MAP is clearly focused on its core mission of providing services to individuals in need. Each of Cube's interviewees spoke about the personal satisfaction that working at MAP offers, and the team came away with a strong sense that MAP values social work. Secondly, MAP also shows the ability and willingness to innovate in order to expand the services that it offers. For example, MAP created a lunch cart staffed by clients that serves food prepared in a professional kitchen by MAP clients and provides additional funding for services. Third, MAP's leadership is invested in improving its development outcomes, as emphasized in Cube's initial client meeting with MAP. This is an important aspect of MAP's efforts to diversify its funding sources and reduce its dependence on any one funding source. Fourth, MAP has a cohesive internal culture that contributes to MAP's success. Individuals in MAP get along with each other and communicate well face-to-face, and several of the interviewees referred to MAP as a family and to other MAP employees as important sources of inspiration.

Methodology

Cube's project focuses on how MAP manages its donor contact information, with a broader goal of updating its handling of this information in order to improve its development process and outcomes. Specifically, the team examined how MAP organizes its current DxD fundraising, from creating donor contact lists to soliciting and collecting donations to saving information for the next year's event. The team also looked into how MAP could tie its newsletter distribution into the development process to improve its overall communication with stakeholders.

This investigation took the form of a contextual inquiry. The primary focus of Cube's data collection involved six semi-structured, on-site observational interviews that allowed us to interact with MAP team-members in the environment in which they typically complete their work. These interviewees included the coordinator of the REACH housing program in charge of one development process; the office administrator tasked with managing the other process; the CEO, who oversees day-to-day direction and longer-term planning for the organization; the vocational programs coordinator; a job developer involved in soliciting and retrieving donations; and the housing management coordinator, who maintains MAP's contacts with contractors.

Cube asked each interviewee a series of questions that the team had prepared beforehand to get a feel for the interviewees' work, involvement with MAP's development process, and opinions on MAP and their work environment. Cube also observed the interviewees performing their work and gathered artifacts relevant to that work in order to better understand their actions and personal routines in context. After each interview, the team held an interpretation session: a three-hour meeting during which the team examined the data and artifacts collected by the interviewers and developed a list of important points (called "affinity notes") that came out of

the interview. On the basis of this data, Cube constructed four individual models detailing the work and environment for that interviewee. These models aimed to visualize that interviewee's cultural influences, the flow and sequence of processes relevant to the interviewee, and the interviewee's physical environment.

Once Cube completed the process of data collection and analysis for each interview, the team created consolidated models to visually represent what the team learned about MAP as a whole. In addition to organization-wide views of the four aforementioned models, a markup of documents and databases currently used by MAP, and a model showing the full development process start-to-finish, Cube created an affinity wall. This wall gathered all of the affinity notes that the team had created during its interpretation sessions and organized them into categories based on their essential points. Cube walked through this affinity wall with our discussion leader and two representatives from MAP in order to identify opportunities to improve MAP's contact management and development process.

Based off of this consolidated understanding of MAP's organization and culture, Cube brainstormed recommendations and sorted them to choose the best based upon their impact, feasibility, and ease of implementation. Through this process Cube identified the following four recommendations in this report (as well as two additional ones in the appendices), which the team felt best met these three criteria based on its understanding of MAP.

Recommendations

Consolidate development processes

The first major finding relates to the way in which MAP organizes its DxD fundraising activities: there are two duplicate, parallel, and uncoordinated development processes run by two different individuals. One process focuses on cash donations and ticket sales for DxD, and the other handles in-kind donations of items and services that will be sold in the silent and live auctions conducted at the DxD dinner. These processes involve many of the same activities: creating donor contact lists, sending initial solicitation letters, assigning solicitors to contact donors, gathering pledges and donations, organizing gifts for the DxD event, and sending thank-you letters. Unfortunately, at present there is little coordination between the two donation managers, and the processes themselves are completely separate. This separation creates inefficiencies as well as the strong possibility of donor confusion.

One prominent example of this lack of coordination and the issues that it creates came up in a few of the interviews: the contact list for one donation process was shared with the other process's organizer this year, but only after the initial solicitation letters were mailed. The latter

organizer faced a choice between the time-consuming task of de-duplicating the two lists or the risk of sending a duplicate solicitation letter to someone who had already been contacted. This also made it impossible to coordinate requests to organizations present on both the in-kind and cash gift list in order to make the most effective solicitation. De-duplicating the contact lists is an ad-hoc action that is not built into the system.

This example demonstrates the issues with these separate processes: having parallel processes increases the possibility for this lack of coordination to occur and, as both are burdened by the historical way in which the process has been completed, minimizes the creation and sharing of best practices. Each system uses different storage software that is only accessible from that organizer's computer. One organizer tracks pledges for follow-up and collection by solicitors, whereas the other waits to receive donations. In one process, donors are randomly assigned to solicitors by the organizer, while the other relies on solicitors to volunteer to contact specific donors (ideally with whom the solicitor has a relationship). The lack of best-practice sharing hinders MAP's efficiency in development and likely depresses its fundraising abilities.

Based on these findings, Cube recommends that MAP combine these two development processes and task a single individual with managing development activities. This person would especially oversee activities associated with DxD, but ideally non-DxD development would also fall under her purview. Accordingly, this person would manage the in-kind, cash, and ticket purchase solicitation processes in the lead-up to the yearly DxD event. In recognition of this person's new responsibilities, Cube also recommends that MAP give the development manager a new title to emphasize this focus.

Implementing this recommendation would enable the new manager to develop a single, coherent development process that uses the most effective aspects of the existing systems and adopts new practices that will improve MAP's activities. This person will be in a position to protect against the fragmentation of information and practices that MAP has experienced in the past with its duplicate processes. Moreover, having a single person in charge of these activities will reduce confusion within MAP about what development entails and whom to approach with questions or suggestions about development activities and practices. Finally, combining these processes will enable MAP to better coordinate its various development activities to present a more organized and professional appearance to donors.

Consolidate contact lists and store them in a unified format

Donor contact lists are an essential tool in MAP's solicitation process, but current lists are fragmented. There are more than five different contact lists stored in four different, non-interoperable programs. These lists include: a Microsoft Excel spreadsheet with the 2012 in-kind donations contact list, in-kind donor lists from several previous years in a FileMaker Pro database, email newsletter contact lists stored in Constant Contact, a corporate donor list in an

Excel spreadsheet, and an unused list of cash donors stored in an unmaintained Access database. Merging these lists consumes hours of staff time (seven hours, in one case) each year in preparation for DxD solicitation efforts, yet even so these consolidated lists do not contain all of the contacts from previous years. The hours required to merge data from these separate sources consume MAP's limited resources and create the potential that donors may be confused by duplicate solicitations.

MAP's contact lists are typically stored on one computer, limiting access to information and creating the risk of data loss. According to one interviewee, five years of donation history for DxD is stored on an outdated computer in a FileMaker Pro database accessible to only one employee. Unfortunately, only this computer has the software required to use this data, and the staff perceives shifting data from this system to be risky. The present situation also creates fragmentation of information, such as the Access database with DxD donor contact information that remains unused and unmaintained. The contact information in this database resides on one computer and cannot be retrieved from other computers; only one user can access it, which limits the data's usability at present.

Based on the findings and evidence presented above, Cube recommends that MAP combine the existing contact lists into one list and decide on a unified format for the storage of contact lists. First, this will require MAP to perform a one-time consolidation of contact lists and decide which data to keep and in what format. After this one-time consolidation, future fundraising should be based upon this consolidated list to avoid future information fragmentation. Second, MAP should store this newly organized contact list so that it is accessible to MAP staff and board members, backed up, and secure. For suggestions on possible contact management solutions, please see the systems described in Appendix III.

Use calendars to track time-sensitive activities

Many steps in DxD preparation are time-sensitive or even time-critical. Interviews revealed that MAP's staff "just knows" to begin DxD planning around September, six months before the February event. Key planning tasks include sending solicitation letters to businesses asking for sponsorships or gifts, as well as sending save-the-date messages, sending DxD invitations, and managing logistics like booking a venue and a caterer. Some recipients of solicitation letters prefer to be solicited at specific times: MAP has found that banks typically plan their next fiscal year's charitable giving in October. MAP also wants to reach out to new local political candidates with email newsletters and DxD invitations shortly after they take office in order to raise the organization's profile among public figures. To maximize the value of these contacts, MAP needs to time its outreach appropriately.

In the past, MAP has relied upon one person's knowledge and network to keep track of which contacts need outreach at a specific time. This has worked well, specifically for the broad

category of banks, which require outreach in October. Interviewees also realized that they should be adding local political candidates to their contact lists in the run-up to the primary and general election, but have been less diligent about this. Since this consulting project began, MAP has started to log these time-sensitive tasks in the DxD binder, a volume that compiles paper artifacts from DxDs past. This will inform future years' planning to keep the process on-schedule, and this record will become all the more critical to MAP's institutional memory as a key staff member in the development process is leaving MAP.

Cube recommends that MAP expand this effort to track time-sensitive activities and develop a list of critical tasks and milestones in calendar form to remind MAP to reach out to banks in October and to add political candidates to their contact lists in July and October (before primary and general elections). This calendar could be expanded to include other milestones MAP deems useful, like a date by which solicitors should have completed approximately half of their phone calls, or a date by which the DxD invitation list should be finalized. Depending upon MAP's work preferences, this could exist as a large, shared wall calendar in the common space behind the reception desk, a free online Google Calendar (calendar.google.com), with support for email reminders to specific people, or as an online to-do list stored in a free tool like Remember the Milk (rememberthemilk.com). (Disclosure: a Cube member works at Google.) MAP may also use this calendar, its contact list, or donor management software (see Appendix III) to track when individual contacts prefer to be solicited in order to time requests appropriately.

Track donor history

Although donations and attendance for DxD are currently tracked, many other details, such as how a contact is connected to MAP, are not. At present, MAP retains no information about who interacted with a contact and when, nor does it track the outcome of interactions that do not result in a donation. Instead, this information exists exclusively in individuals' memories. Not having this information limits the continuity in donors' experience with MAP, which may make them feel less comfortable with the organization.

According to the interviews that the team conducted, MAP's donation solicitors do not record information about their contacts with donors or pass this information onto donation managers. Moreover, no process exists to record the source of new contacts, even when this information is readily available. Many existing contacts' connection with MAP is unknown, unless they are connected via MAP's leadership—MAP's primary source for contact information. Although there are some artifacts that show historic donations to MAP, this information is stored in relatively unusable ways. From year to year, MAP collects only in-kind solicitation outcomes for each donor in the FileMaker Pro database and Excel spreadsheets on the DxD laptop. There is no consistent tracking of other information for each donor, such as a donor's interests, concerns, or disposition. Furthermore, as MAP only retains information associated with successful solicitations, there is no record of unsuccessful ones.

According to these findings, Cube recommends that MAP track how contacts are connected to MAP. This will help to keep contacts with donors consistent and enable MAP to better target solicitation efforts to individual donors. Additionally, MAP should create a log of contacts with donors as well as the outcomes of these interactions. Cube has recommended some donor management systems in Appendix III that provide specific tools to help track this information. Regardless of the system chosen, for each contact, it should allow MAP to retain information on: the donor's connection to MAP, past solicitors who have interacted with the donor, when those past interactions took place, the outcome of those interactions, and any reasons behind unsuccessful solicitation efforts if known.

Conclusions

MAP is a successful and effective social services agency with a history of innovation and a commitment to service. Cube suggests that MAP build on its existing development success and optimize its practices by adopting these recommendations individually or together at MAP's discretion. By combining duplicate data sources and processes, creating formal tracking of recurring events and tasks, and logging additional details about individual donors' histories, Cube hopes that MAP's fundraising efforts can become more targeted, more effective, and more efficient. Cube wishes to thank MAP and its staff for their cooperation and generosity; Cube sincerely hopes that these suggestions will help the agency become less dependent upon any single funding source and will additionally free MAP's resources to work on projects that offer the greatest good to the organization's most important constituents: its clients.

Appendices

I: Use free media to expand MAP's reach

In today's world, more and more people interact with organizations that they support via social networks. As a non-profit organization offering services that create the basis of compelling stories, MAP stands to benefit from a substantial presence on these networks, but it has not yet taken full advantage of this opportunity. For example, even though over 180 people have "liked" MAP on Facebook, Cube found that MAP inconsistently posts status updates, and interviewees noted that no one has subscribed to MAP's newsletter via the subscription button on MAP's Facebook page. Similarly, while MAP does have a website with a lot of content about its services, the design looks rather dated, and its information could be more effectively organized.

Anecdotally, although two members of Cube are long-term residents of Washtenaw County and support its mission, neither had ever heard of MAP before starting to work on this project,

providing evidence of the potential stakeholders that MAP has not been able to reach via its current efforts. Moreover, interviewees noted that MAP would like to find new donors and supporters. Currently, MAP's solicitations rely on expensive direct mail, as illustrated by the fact that it sends brochures and invitations to a limited number of people in order to save on printing and mailing costs. Finally, in the past MAP has had limited IT support and right now actually has no dedicated, in-house IT person.

Based on these findings, Cube recommends that MAP develop and cultivate a more substantial online and social networking presence. This recommendation fits into two avenues, separated based on feasibility: short-term and long-term. In the short-term, MAP should post more frequently to Facebook with information about recent activities and work to better maintain its Facebook page. With these status updates, MAP can encourage current followers to share its page and to explain its mission. MAP can also reach out to local press and organizations to promote MAP and to share information about DxD on public events calendars. Further, rather than exclusively using mail to send invitations for DxD, MAP should supplement these mailings with email where possible, which will allow it to invite more people to attend DxD without increasing its costs. Having more people come to DxD will create more donation opportunities and even boost development. Over the long-term, Cube recommends that MAP hire a web developer to build a new website. A well-designed, professional-looking website will create a better first impression for people looking to learn more about MAP. This project could also include a blog on which MAP can write about its projects and ongoing activities as well as integration with social networking tools to ensure that the site has frequent updates. This would also help ease one effect of MAP's limited IT support.

II: Set rules to determine how donors are solicited

The success of DxD depends upon reaching attendees, sponsors, and in-kind donors for the event, but the expense of direct mail and the size of MAP's staff limit how many organizations and individuals can be solicited. In part because of this constraint, significant resources are invested to determine the accuracy of contact information as well as to decide which contacts are asked for cash donations, which are asked for in-kind gifts, and which are invited to DxD. As part of this process, all contact information is shared with the board of directors in a Microsoft Excel file. Board members are then asked to review contact information to ensure it is accurate for individuals and organizations they know and, if necessary, are asked to make changes to incorrect contact information before replying to all with an updated file. Board members are also asked to volunteer to ask for donations from contacts they know. However, at the time of the interviews, the board of directors had been unresponsive to this task.

Similarly, MAP's leadership reviews many changes to MAP's contact information: it is alerted when contacts choose to unsubscribe from email lists and is in some cases consulted before a new organization is added to solicitation contact lists. This adds value because the leadership can

provide additional context, such as knowing that banks should be solicited in October, when they make their yearly charitable giving plans. However, this comes at the price of adding overhead to changing contact information and the solicitation lists as well as consuming the leadership's valuable and limited time.

Cube recommends that MAP establish rules to determine which contacts receive which types of solicitations: a request for a cash gift, a request for an in-kind gift, or an invitation to buy DxD tickets. One interviewee mentioned that the DxD invitation list typically includes all contacts that are new to MAP in the last year, as well as anyone who attended DxD in the last three years. Contacts matching these rules (or any set of rules) can be selected from the contact list and invited to DxD with no or minimal manual review, saving staff and board hours. For example, MAP may choose to ask for a cash gift from organizations who have given more than $500 in the past year, while asking other organizations for an in-kind offering.

Additionally, Cube suggests that MAP assign contacts to solicitors rather than asking board members or staff to volunteer to contact individuals they know well. If possible, contacts should be assigned to the same solicitor from year-to-year. Solicitors should be allowed and encouraged to shift contacts between them to best utilize their networks if they have a special relationship with a specific contact, but assigning contacts automatically would reduce the time that the board and staff spend reviewing contact lists.

III: Data storage options

Spreadsheet collaboration

Cube recommends that MAP immediately shift to web-based spreadsheets for managing donor information. These tools will be immediately familiar to anyone who has used a desktop spreadsheet, but they have several key advantages. Among these advantages are:

- **Simplified collaboration:** No need to email files back-and-forth to collaborate; users can simply share a link and the link will always direct users to the latest version of the file.
- **Collaborative editing:** Unlike shared files on a server, which can only be edited by one user at a time, online spreadsheets allow many users to edit or view a file at the same time. For example, two solicitors making a call to two different donors can simultaneously enter the results of their call into the spreadsheet.
- **Accessible anywhere:** Users can log in to any Internet-connected computer to view their files, allowing users to work even when they're away from their office computer.
- **Better backups:** Cloud-based spreadsheets are typically saved in several locations across the country; compared to locally stored files or even locally backed-up files, they are much less likely to be lost.

- **Version history:** Cloud-based spreadsheets typically keep track of all changes made to a document back to the document's creation. If critical information is accidentally deleted or errors are introduced, it is easy to rollback to an earlier, unaffected version of the document.

Online spreadsheet tools are typically parts of larger office suites that include email, calendars, word processors, and presentation editors. MAP can easily adopt these suites just for spreadsheets, but longer-term it is worth examining suites' additional functionality to see if these extra tools are good fits for MAP's workflow. Though there are many online tools in this space, Google Drive and Microsoft SkyDrive may be the most prominent. (Disclosure: a Cube member works for Google.)

- **Google Drive (drive.google.com)**
    - Free for individuals—MAP staff members can sign up for individual accounts and then share between these accounts
    - Free enterprise version with support for non-profits via application process (google.com/nonprofits)
    - Offline editing of files stored online is available using a free browser plugin
    - Mobile access to files provided via a mobile application as well as a mobile-optimized website; files can be edited on a tablet or phone
- **Microsoft SkyDrive (skydrive.live.com)**
    - Free for individuals—MAP staff members can sign up for individual accounts and then share between these accounts
    - $6 / user / month for enterprise version with support
    - Offline editing of files stored online is available using Microsoft Office
    - Mobile access to files is provided via a mobile application, but access is view-only; editing on a tablet or phone is not supported

Donor management software

Longer-term, MAP may choose to move to donor management software, tools designed to keep records of contacts, communication with contacts, and donor history. Despite the name, donor management software is equally suitable for tracking relationships with stakeholders and friends of MAP as it is for tracking donors. This software is typically closely related to customer relationship management software (CRM) for sales organizations, and some of the solutions described below were originally designed for sales teams.

Donor management software is more complex than MAP's current spreadsheet-based tracking, and it will take significant time from an interested staff member to learn how to set up donor management software, migrate MAP's information into a donor management system, and train

other staff members on its use. Despite this complexity, donor management software offers several key advantages over spreadsheets:

- **Track donor history:** Donor management software allows users to track every interaction with a contact, whether it is a phone call, a mass email, a physical letter, or a gift from the contact; users can access this history when soliciting in order to make a more effective ask. This information can also be used to track current-year development progress. Tracking this much detail in a spreadsheet would make it too large and unwieldy to use.
- **Support for bulk email:** Many software packages include support for mass emails, which would allow a single system to power both development efforts and MAP's newsletters (currently managed through Constant Contact). This would also make it easy to send targeted development emails by combining systems to manage email addresses and other forms of contact information.
- **Support for direct mail:** Donor management software typically supports mail merge, making it easy to create customized letters and mailing labels based upon contact information stored in the system.
- **Easy reporting:** These software packages have robust reporting features, making it easy to answer questions like: How many donors gave over $500 last year? Who is MAP's biggest benefactor year-to-date? Which donors gave last year but haven't given this year?

Cube recommends that MAP consider cloud-based donor management software. This software typically requires less configuration and therefore less specialized IT knowledge than locally hosted donor management software. Additionally, cloud-based solutions share key advantages with the online spreadsheets described above: the information is accessible from any computer with Internet access and donor management software providers have very robust programs in place to backup information and prevent data loss. While there are many cloud-based options for donor management, the options listed below are a few examples that may be suitable for MAP. The following three options, Zoho CRM, Blackbaud eTapestry, and Salesforce.com are listed in order of complexity: Zoho CRM is arguably the simplest, while Salesforce.com is the most complex.

- **Zoho CRM (crm.zoho.com)**
    - Free for up to 3 users; additional users $12 / user / month
    - Simpler than eTapestry and Salesforce.com
    - Not designed for non-profits, but provides easy-to-use customization options
    - No way to link individual donors to an organization, *i.e.* a single individual's contact information cannot be linked to both their personal donations and their business's donations. Separate contact records must be maintained for the business and the individual.

- ○ Supports bulk email via Zoho Campaigns for additional fee ($22 per 1,000 emails or $10 / month, discounts available)
  - ○ Support for mail-merge templates
  - ○ Interface is suited to browsing, searching, and reporting
  - ○ Free mobile application allows users to view and edit information from phones and tablets
- **Blackbaud eTapestry (etapestry.com)**
  - ○ $99 / month subscription for 1,000 contacts and unlimited users
  - ○ Simpler than Salesforce.com, but more complex than Zoho CRM
  - ○ Purpose-built for small nonprofits, reducing the amount of customization required
  - ○ Robust support for complex relationships between individual donors and organizations; allows tracking of a person's individual donations while designating them as the fundraising contact for a business or organization that makes institutional donations
  - ○ Supports bulk email
  - ○ No built-in support for mail-merge templates; mail merge is only possible by exporting data from eTapestry into a desktop office suite with mail merge support
  - ○ Interface emphasizes search, it is difficult to browse contacts; robust reporting
  - ○ Desktop website is accessible from phones and tablets, but isn't optimized for mobile use
- **Salesforce.com for non-profits (salesforcefoundation.org)**
  - ○ Free for up to 10 users; additional users $125 / user / month
  - ○ More complicated than Zoho CRM or eTapestry
  - ○ Built for large, enterprise sales teams; extensive customization required to support non-profits
  - ○ Robust support for complex relationships between individual donors and organizations; allows tracking of a person's individual donations while designating them as the fundraising contact for a business or organization that makes institutional donations
  - ○ No support for bulk email, but integrates with Constant Contact
  - ○ Support for mail-merge templates
  - ○ Interface is suited to browsing, searching, and reporting
  - ○ Free mobile application allows users to view and edit information from phones and tablets