A GUIDE TO IT AND FUNDRAISING

creative partnerships australia

Fundraising is all about people. People want to support you as much as your idea. But you can only carry so much information in your head – that's why you need technology to help manage your relationships, i.e. your current, prospective and next biggest supporters.

As an emerging artist or company on the make, if you're going to take your fundraising activities anywhere near seriously, you're going to need backup.

Collecting relevant information about your donors and communicating with them effectively is one of the most important things to get right. And that heap of comments slips, dog-eared receipts, email lists and half-finished spreadsheets piled up on the corner of your desk do not constitute a database.

What you need is a donor management system – and you need the system, or software, that's right for you.

Why do I need it?

Only 20 percent of your communication with your supporters should be about asking for money. The rest should focus on sharing the love of your project and taking your supporters on a journey.

That means you need relevant data on your supporters so you can have meaningful and targeted conversations, not bombard them with random updates, appeals, cat videos or whatever. And you want to make life easier for yourself, so you can concentrate on the thing you do best, making the art.

You need a system which will help you remember who people are, where they live, which project they are interested in, what work of yours they have seen, and whether they have been supporters of yours or similar work in the past. Ideally you need a 360-degree view of your contacts of what turns them on.

Get your community thinking about you by sending them relevant email or snail mail and interesting content to keep them engaged and involved. This might include links to your website, embedded video and links to your crowdfunding and social platforms. It is also an opportunity for them to write back to you, and give you feedback about your ideas and work.

If you have more than 20 contacts, you're going to need a system. This way you can remember how and when to contact people, what communications or requests you have previously sent them, and their response.

Where do I start?

A donor management system could be a list of names and addresses on an excel spreadsheet, but once you get past 20 names and you plan on doing this more than once, you should consider something better.

Work out what you need and compare it to what's out there. First question – how big are you? A lot of the major performing arts companies use software called Tessitura, which handles box office, fundraising, reporting, marketing and customer relations data.

This behemoth packs everything into a single database so that relationship managers can click on one name (or constituent, as they're called) and access their purchase history, giving history, preferences and all previous contacts with the institution. It's the Ferrari of donor management software, allowing the admin person to concentrate on their smooth delivery.

But not all of us need – or want – a Ferrari. Especially if you have to park it in the back alleys of an indie arts precinct. As a small to medium business or individual artist, a more powerful and complicated system may be harder for you or your staff to use, and be a waste of precious time and money. So, look at what you need:

1. Look at your typical procedures, how you engage your prospects and how you encourage them to commit. What combo of information do you need to produce reports, mail merges or exports?
2. Think through your numbers. Software is often priced on number of users. Where are you now and where do you plan to be in the next few years?
3. How much money can you spare? How much do you have now for set-up and training, and how much for maintenance over time? How good are you at IT? If you need someone to help you set it up that will cost too.
4. What do you want the software to do? Make a list of the nitty gritty details that you will need to see at work in any demonstration. If you want it to make a cup of tea, include that too, but don't hold your breath. Now test some systems.

What's out there?

You want a good, and simple, database that does what you need.

Databases software can be hosted (packages that work over the internet for a monthly fee are a great option if you are short on cash or staff), or local.

A local solution is installed on your own server or desktop. You need someone with enough nerd juice to install it, create backups and do the updates. You own the software, which costs more upfront but can save money over time.

Technology is changing so fast these days you need to check out the web for what's available, and often now its free. At the time of writing, Airtable is the latest free hosted database and it is awesome in terms of functionality and usability – it even has a donation tracking module you can copy.

Can’t I get this stuff for free?

Yes! Or at least large elements of it. As a not for profit, it’s pretty much your responsibility to keep your IT costs as low as possible, so you have more money to spend on the actual thing you do.

The obvious: email, of course (Outlook is everywhere; Gmail has heaps of storage and good spam blockers), and social media management tools (Tweetdeck and Hootsuite lets you schedule posts, Google Analytics analyses your social media, GrabInBox lets you manage multiple FaceBook, Twitter and LinkedIn accounts).

Fundraising specific: Some of these, while free, are in fact modules that work with commercial databases such as MS Access and Filemaker: Ascent(UK); Donor Express (USA); Donor Management (Donman) (Australia); Donor Strategy (UK); Easy-ware Software Solutions (USA); FileMaker Donations (Australia); Sage Software (USA); Basic Funder (USA); Ebase (Open Source); Infocentral (Open Source – Linux); Metrix (USA).

Looks like we’ve got this thing stitched up. What else do I need to know?

People far wiser than us have thought this through and boiled down all the potential horrors of selecting a donor database to some common mistakes.

1. Letting IT make all the decisions. They’re great on the tech, but only you know what you want to do with it. Get input from all the departments and levels of the organisation that will actually use it. Ask the tech peeps if your choice fits into the organisation’s strategy and they can support it, but make the final decision yours.
2. Wishful budgeting. If you chose a system that costs money, make sure you can afford to pay the bill, this month and every month. Budget for upgrades, training, maintenance and price rises. Remember, you are in this for the long haul, and the bills keep coming.
3. Prioritising price over everything. Yes, cost is important, but it’s not the rooster. Buy the product that meets your top needs, AND is affordable. Only accept a donation of software or services if it meets your needs. And remember that 'free' has costs.
4. Randomly looking at demos. This is a bit like scrolling through Facebook to get the headline news. Know what you want, get a selection team together, then go through the steps in 'Where do I start?'. Make sure the vendor addresses your top needs.
5. Falling in love with the cool stuff. This thing can plot all your supporters on a 3D map??!! That’s nice. But if it wasn’t on your list of needs, you don’t need it.
6. Buying more than you need. We already talked about Ferraris. Plan for the future but make sure you can use this thing now. Some systems are better at add-ons as you grow. And don’t overlook the option of improving what you already have.
7. Confusing highly functional software with highly functional staff. Beware of people problems masquerading as tech problems. New software will not solve undertrained staff, poor communication, broken business processes and poor management. If they don’t have the tech knowhow now, the problems will only get worse.
8. Hoping the database will install itself. So it turns out buying the software is the easy part. You need to clean up the old data, swap it over, configure it in the new system and work

out what to do with it. Some orgs get through this by re-assigning staff or hiring temps. If you have a deadline (e.g., end of the financial year), let it be known.
9. Leaving the database to fend for itself. Look at your shiny new toy! You don't want it to get all dented and dirty. To look after it, someone needs to 'own' the database, be responsible for quality control, run regular audit reports and train staff on new features. You might call this person the data manager. Give them some love.

So that's it then?

Yes. Understand what you need and follow through. The software is just the tool to let you get on with your real job of making the art. Have clear goals, a realistic budget, a solid selection process and good communication.