A Few Good Tools: Low-Cost Constituent Databases

Affordable databases for a variety of needs

By: Laura S. Quinn
April 22, 2007

This article is courtesy of Idealware, which provides candid information to help nonprofits choose effective software. For more articles and reviews, go to www.idealware.org.

A three-person organization is looking for a better way to track people. They currently store data on about 600 volunteers, donors, partners, and other constituents in a series of spreadsheets. They want to consolidate this information into a central place so they can find people, understand what contact they've had with them, run mailing and email lists, and keep on top of who is doing what. They have very little money for this, and are hoping to find something inexpensive and easy to use.

Does this sound familiar? Many small organizations are looking for an inexpensive way to manage constituent data. We asked a number of nonprofit technology professionals about the software that has worked well for them in similar circumstances. We then combined their thoughts to come up with a set of solid tools that might work for you.

Take Your Needs Seriously

Constituent data is the lifeblood of most organizations. It’s important to think through how important this system will be to your organization, and budget accordingly. A rule of thumb is to spend 0.25 to 0.5 percent of your annual budget on a solid constituent management system. If you have a $500,000 annual budget, this would mean devoting $1,250 to $2,500 per year to managing your constituent data. And don’t forget that there will likely be costs for customization, training, updates, and maintenance down the road — and these costs may well be higher for tools with lower initial fees. Don’t assume that the cheapest ways are the best.

Before you choose a database, think through how you plan to use it. The more clearly you can define how you plan to use constituent data, the more likely you are to choose a good database for you, and use it effectively after you acquire it. Take a bit of time to consider:

- **What types of constituents do you have?** Who are you going to track in the database? Donors, volunteers, board members, community partners, vendors, media, business supporters? Others?

- **What do you need to track about each of these constituents?** How will you interact with them? What information will you need to grow the relationship? For example, organizations that recruit business sponsors for events need a database that can track these cultivation steps. This data is very different from that for a simple direct donation mail campaign.

- **What reports and outputs will you need?** Think through the information you’ll need for funders, summaries, mailings, and other lists.

- **How are your needs likely to scale over the next couple of years?** Nothing’s worse than putting something into place that becomes an organizational roadblock just a year or two down the road. If you have plans for growth, consider investing in a more sophisticated database so that you won’t have to go through the selection and integration process all over again next year.

- **How will it integrate with other data sources, such as other databases, email tools, or information gathered online?** Do whatever you can to not add new databases that don’t speak to the data sources you already have.

Tools You Already Have

Just because other organizations have a database doesn’t necessarily mean that you need one. Do you have simple needs that aren’t likely to expand over time? If so, you might be able to use one of the tools you already
have in a new way.

- **Spreadsheets.** They won’t scale to manage thousands of people or complex requirements, but one or more shared Excel files might work fine for simple needs. If the spreadsheet needs to be shared or used by people while on the road or at home, consider using a Google Spreadsheet — essentially, a free online version of Excel.

- **Contact Management Software.** Do you already have a tool that stores contact information, such as Outlook? If so, can it be shared within your office? Don’t make a decision to acquire a complete software package if what you need is some planning for a shared address book in Exchange.

- **Database Software.** If you have very simple needs and a staff member who is proficient in Access or FileMaker Pro, creating a small and basic database might be a reasonable solution. Think carefully, however, as to whether you are reinventing the wheel by creating complex functionalities that you could purchase for much less, and whether the staff member with database skills is likely to still be around in a year or two. On the other hand, if you have already invested money and organizational brainpower on an in-house database, don’t jump to the conclusion that it shouldn’t be updated to meet new needs.

### Inexpensive Packaged Tools

If you are looking for a basic database that is easy to use and straightforward to set up, your best bet is to go with packaged database software. These tools are designed to be relatively easy to use by organizations that are not necessarily very technically savvy, and offer support for those who need it.

- **GiftWorks.** A traditional, locally installed database starting at $299 per computer. Their focus on ease-of-use makes the tool easy to get going and right out of the box. The core product is focused on managing gifts and donors, but they offer an extension to track volunteers as well for an additional $199. Windows only.

- **eTapestry.** A fairly full-featured online donor database. It is free for up to 500 constituents and $35/month for up to 1000, but goes up rapidly in price after that. It is primarily targeted at managing donors, but user-defined and category fields make it usable for other types of constituents as well. Web-based.

- **DonorPerfect.** DonorPerfect is based around, well, donors, but also has some support for members, volunteers, and other contacts. Their installed version is a bit beyond the price range of this “low cost” article, but they offer an online hosted version for a reasonable monthly fee, which may be worth considering for organizations more comfortable paying “rent” over time rather than a lump “purchase” price.

- **Salesforce.com.** A high-end online relationship management database that is offered free to 501(c)3 nonprofits with up to 10 users. The software was originally targeted at corporate sales organizations, but it has a substantial commitment to the nonprofit sector, and is used by a sizable number of nonprofits. There is a growing body of templates to allow basic to mid-level features for tracking donors as well as other constituents. With training, a knowledgeable user, perhaps with consulting help, can adapt it for organizational use. Salesforce has an open architecture which encourages clients and community members to build, share, and even sell modules which plug into the core database functionality.

- **Democracy in Action.** An online database for $100 a month for up to 3,000 constituents and $200 a month for up to 25,000 (setup is $100 to $200). They offer basic constituent management features that are integrated with more powerful email, online donation, and advocacy features. DIA is intended as more of a toolset and less of an out-of-the-box solution than GiftWorks or eTapestry. Web based.

There are many inexpensive packaged tools available to track nonprofit constituents. If you’re looking for more options, consider CitySoft, Easy-Ware, Sage Fundraising 50, Telosa Exceed, Wild Apricot, or take a look at Robert Weiner’s list of **Inexpensive Donor Databases**.

### Free Databases for the Tech Savvy

There are a number of free applications that are intended for use by small organizations. These applications are generally less refined than the packaged tools above. Organizations should expect to devote more time to setting them up, learning how to use them, and dealing with bugs and user interface challenges. Traditional vendor support is not available, although these tools have active user communities that can help troubleshoot issues. Make sure you have a long-term plan as to who at your organization will be responsible for supporting the database (and then a backup plan of what will happen if they’re no longer available).

On the other hand, these databases are more flexible than the packaged databases above. Someone with the right technical skills can extend them and tailored them to your needs.

Unless you have a staff member on staff with a lot of experience in designing, installing, and customizing database
solutions, expect to pay $500 to $3,000 or more to a consultant or firm to get you up and running with a tool like Metrix or CiviCRM.

- **Organizer’s Database**. A basic installed open-source database that is quite small in file size and works well on older equipment. It has strong contact management functionality, and a new version adds more support for donor tracking. Those with Access knowledge can customize and extend the software. Detailed documentation and training available. Windows only, but it does not require you to have Microsoft Office installed.

- **Metrix**. Metrix is a flexible open-source database geared to manage all the “interactions” between you and your constituents. It’s built on Microsoft SQL Server, with an Access front-end. It’s designed to be customized and extended by someone with substantial Access skills. It has somewhat more features than Organizer’s Database, and thus takes a bit more time to learn. Windows only.

- **CiviCRM**. An open-source online contact manager that integrates tightly with the popular Drupal and Joomla Content Management Systems. The integration means that you can manage Web-site users and constituents at once, adding to the community-building side of contact management. This tool has enough sophisticated functionality for many organizations to use it as is, but is extensible by someone with PHP skill. Most organizations will need a skilled technology professional to get you up and running. Alternatively, CivicSpace On Demand offers those without technical expertise a hosted alternative, which allows you to get CiviCRM, Drupal, and more for $50 a month.

**For More Information**

More Idealware Resources on Constituent Databases
Idealware has many more articles on this topic, including overviews of Case Management Databases, Databases for Membership Organizations as well introductions to CRM concepts, data integration, and choosing a donor database.

Four Steps to Selecting Donor Management Software
NPower Seattle’s great toolkit for selecting donor database, which provides detailed steps for choosing as well as a number of checklists and templates.

A Roundup of Articles about Databases
The Metrix team has put together a comprehensive list of articles about databases, organized by stages in the process.

Many thanks to the nonprofit technology professionals who offered recommendations, advice, and otherwise helped with this article:

- Steve Andersen and Jon Stahl, ONE/Northwest
- Steve Backman, Database Designs Associates, Inc.
- Gala Barnes, NPower Greater DC Region
- Steve Birnbaum, Jacobson Consulting Applications
- Brett Bonfield, NPower Pennsylvania
- Evan Callahan, NPower Seattle
- Marion Conway, Marion Conway Consulting
- Jenny Council, NetCorps
- Ted Fickes, Eagle River Partners
- Paul Hagan, Independent Consultant
- Betsy Harman, Harman Interactive LLC
- Rem Hoffmann, Exponent Partners
- Perry Lawrence, Main Line Interactive
- Eric Leland, Leland Design
- Shawn Michael, TACS/NPower Oregon
- Ryan Ozimek, PICNet
- Dan Shenk-Evans, Community IT Innovators (CITI)
- Ray A. Stuart, World Links
A Few Good Tools: Low-Cost Constituent Databases

Chris Steins, Urban Insight
Mark Topping, NPower New York
Robert Weiner, Robert L. Weiner Consulting

The article was edited by Idealware; any errors or omissions are Idealware’s sole responsibility.

Share Your Feedback
Was this article helpful?  ○ Yes  ○ No  Submit

About the Author:
Laura S. Quinn is Founder and Director of Idealware.

Copyright © 2007 Idealware. All Rights Reserved.

(http://www.techsoup.org/learningcenter/databases/page6860.cfm)