

OFFICE DATABASES

[ORGANIZERS
DATABASE](#)

[COMMUNITY
DATABASE](#)

[EBASE V.2](#)

[DONOR
PERFECT LAN](#)

OVERVIEW

Cost (money and time)

learning curve - the most important cost factor!!	very low	middle of road	steep	steep
minimum training time for users	1 hour	2-3 hours	1 day	1 day
minimum training time for administrators	2 hours	4 hours	2-4 days	2-4 days
operating system	windows	windows	win or mac	windows
software (for single computer)	MS Access	MS Access	None*	proprietary
cost (for 501c3 organization, via www.discountech.org)	Free w/Access	\$500 w/Access	Free (runtime)	\$2,995
software (for local area network)	MS Access	MS Access	Filemaker	proprietary
cost (for 501c3 organization, via www.discountech.org)	Free w/Access	\$500 w/Access	\$800 + \$130 per computer	\$4495 for 2, more \$500/ea
setup & configuration time (excludes data conversion)	1-2 hours*	1-2 hours*	8-24 hours*	they do it for you
updates / improved versions	free & automated	free w/\$60/hr help	free & automated	y (w/support fee)
to add new features on your own, you need:	VB & SQL developer	MS Access developer	Ebase developer	Buy a module (if available)***

* A simple, non-modifiable version can run with no other software, but for more power, Filemaker is required (\$130)

** Project Alchemy can do this for you at the rate of \$60/hour. We can also do the data conversion (ask for a quote).

*** Some improvements can be made without a new module - like customizing the forms and reports. Learn this through a training.

Free Support & Training Options

on-screen help menu	y	y	y	y (searchable)
help menu can be customized by your organization	-	y (super-fast)	y (complex)	-
email list support	y (free)	y (free)	y (free)	-
phone support	-	-	-	y (w/support fee)*

* Donor Perfect support fee is \$695/year every year for single user, plus \$50 for each additional concurrent user licensed.

We strongly recommend never letting this support fee lapse - it entitles you to free upgrades and renewing after a lapse is costly.

Fee-Based Support & Training Options

phone training	y (sliding scale)	-	-	y (\$95/hour)
basic training (PA - in office, DP - webinar)	\$60/hour (PA)	\$60/hour (PA)	\$60/hour (PA)	\$240/4 hours
mini-webinars (1.5 hours for specific topics)	-	-	-	y (\$75/1.5 hours)
regional classes	-	-	-	y (\$300/class)
scheduled support: in-office help, support, and training	\$50/hour (PA)	\$50/hour	\$50/hour (PA)	y (\$800+ travel)

Contact Management

people and organizations	y	y	y	y
families (mail families & track gifts w/o duplicates)	-	y	y	n ***
track the relationships between them	y (limited)*	y (unlimited)**	y (unlimited)**	y (unlimited)

* Each group can have 2 contact people and 1 parent organization. No relationships between people. New features planned.

** Unlimited relationships of any type between people, and with groups. Ex: parent, partner, staff, board member, volunteer

*** Tracked through unlimited salutations & soft credits

Organizing Information

this information is mostly tracked using:	checkboxes	menus	whole new form	codes
issues	y (32 max)	y (unlimited)	y (unlimited)	y (codes)
constituencies	y (32 max)	y (unlimited)	y (unlimited)	-
activities	y (32 max)	y (unlimited)	y (unlimited)	y (unlimited)
role played in your org (ie committee/campaign member)	y (32 max)*	y (unlimited)	y (unlimited)	y (flag codes)
senate, congress & house district, and ward, precinct	y	-	y (user-def fields)	-
registered voter	y	y	y	-
party affiliation	y	y	y	-
comments	y (one)	y (unlimited)	y (unlimited)	y (use notebook)
log of events attended and volunteered at	-	y (unlimited)	y (unlimited)	y

* ODB has added feature of tracking not just yes/no for each role, but the level of involvement (1, 2 or 3).

Giving History

this database works best for groups with:	for people only	for all records	for all records	for all records
lots small gifts		major gifts too	the whole range	the whole range
date and amount of gift	y	y	y	y
program or fund (i.e. gen support, designated, etc)	y	y	y	y ("ledger")
general ledger & accounting codes and reports				y
stimulus, or source (i.e. dues, event, letter, etc)	y	y	y	y

solicitor (person that recruited the gift)	-	y	y	y
fiscal year (since sometimes gift year is different)	-	y	y	-
gift note (brief note just about the gift)	-	y	y	y
date thank-you was sent	-	y	y	y (number)
pledges and pledge payments	-	y	y	y
pledge payment due date reminders	-	y (must schedule)	y	y
pledge dilinquency & cash flow projection reports	-	-	-	y
member join, expire & renew tracking	y	-	y	y (separate area)
in-kind gifts (i.e. office equip, auction items, etc)	-	y	y	y
matched gifts (recognize donors w/company matches)	-	y	y	y (soft credit)
via foundation (recognize people w/donor-advised funds)	-	y	y	y (soft credit)
split gifts (one check for 2 or more purposes)	-	-	-	y
memorial & honorarium gifts	-	-	-	y
planned gifts (bequests)	-	-	-	y (separate area)

Fundraising Management

gift overview window (gift totals, max gift, etc)	y	-	y	y
funder strategy per FY (ask amt, budget amt, notes)	-	y	y (must create)	y (not per year)
funder scope, interests, types of support, due dates	-	y	y (must create)	y (use notebook)

Activity Tracking / Project Management

first database view shows pending to-do items	-	y	y	n (opt. pop-up)
track activities & events	-	y	y	y
program/project, cost, # attendees, note	-	y	-	-
to-do items (due date, status, staff assignment, notes)	-	y	y	-
list volunteers and sponsors/allies helping out	-	y	-	-
list attendees	-	y	-	y
track actions taken by/with people, orgs, and families	-	-	y	y
to-do items (due date, status, staff assignment, notes)	-	y	y	y
completed to-do items become historical profile data (ie fundraising asks, phone conversations, etc)	-	y	y	y

Printing

difficulty / skill / time in performing task	foolproof	easy	VERY involved	foolproof
detailed overview of one or more records	y	y (several types)	y (must create)	y (several types)
mailing labels	y	y	y (must create)	y
envelopes	y	-	-	y
thank-you letters	y (per entry)	y (as a group)	y (must create)	y (as entered)
tax receipts	y	y (must create)	y (must create)	y
donation slips with membership exp dates	y	y (must create)	y (must create)	y
phone lists	y	y	y	y
email lists	y (to clipboard)	y (to datasheet)	y (direct email)	y

Reports

generating reports	requires export	fast & easy	requires export	fast & easy
gift reports (show successes)	-	y	y (future, 2.1)	y (many types)
funder profiles (major donor & foundation planning)	-	y	y (future, 2.1)	y (many types)
fundraising goal & strategy reports (planning & budgeting)	-	y	y (future, 2.1)	y (many types)
action reports (to-do lists for staff)	-	y	-	y
project/event reports (show successes)	-	y	-	y
volunteer hours & assignments	-	-	-	y
create new reports as needed	y	y	y (via excel)	n (80 existing)

Integration with Other Tools

Quickbooks, Peachtree, & other accounting software	-	-	-	y (export/import)
Native email client (built into the database)	-	-	y (supports html)	-
MS Outlook and other email clients	y (clipboard)	y (cb or merge)	y (export/import)	y (native text)
MS Word and Excel	y	y (native)	y (export/import)	? don't know

Finding Records and Selecting Record-Sets

list view with search to find records	y	y	y	? don't know
lists that can easily be sorted and/or filtered	-	y	y (filtered only)	? don't know
lists views for quickly entering data (like missing email)	-	y	-	? don't know
simple way to create record sets (queries)	y (foolproof)	y (super-easy)	y (easy)	? don't know

"flags" enable hand-picked & super-complex record sets	-	y	y (via "items")	? don't know
for super-complex record sets, you need to know:	SQL	SQL (or flags)	Filemaker Finds	? don't know

Data Entry and Ease of Use

switchboard displays all options	y	y	y	? don't know
fast data entry	y (fastest)	y	y	? don't know
staff code tracks who entered what	-	y	y (best w/dupes)	? don't know
suggests fixes & duplicates (data integrity checking)	y	-	-	? don't know
bad addresses are clearly visible when record is selected	y	-	y (future, 2.1)	? don't know
1-click to "clone" a record, saving data-entry time	y	-	-	-
1-click to google, mapquest, or white-page a contact	y	-	-	-
1-click to find city or zip code for a contact	y	-	-	-
1-click to copy name and/or postal address to clipboard	y	-	-	-
1-click to copy found set's email addresses to clipboard	y	-	-	-
1-click to export basic contact info for a found set	y	-	-	-

Utilities

import wizard	y (simple lists)	-	y (robust)	? don't know
automatic monthly backup utility	y	-	-	? don't know
simple zip code lookup database pre-installed	y	-	-	? don't know
small enough to save to floppy or email (w/o data)	y	y (when zipped)	-	-
quickly record bugs and feature requests	y (thru email)	y (thru wish list)	y (thru email)	y (thru website)

Summaries

Organizer's Database

Probably the right choice if:

- * You need walking lists for door-knocking campaigns (although you will need to create walking list reports)
- * You use membership dues as a primary way of raising funds and building involvement
- * You do not need to track lots of detail for action items for major donors, foundations, etc. (or you can track it elsewhere).
- * You do not generally receive donations or dues payments from organizations.
- * You do not have a lot of critical special needs which are not currently acomodated in ODB... there are other databases that are more flexible in terms of being adapted toward special needs.
- * You expect to have volunteers entering data a lot of the time, AND do not have time to closely train and monitor them.

Potential gotcha's:

- * Must pick only one: address expired, address incomplete, address good, no fund requests, no xtra fund requests, no newsletter.
- * Individual records can only be one type: donor or prospective, funder, journalist, constituent, vendor.
- * Unlike Community DB, drop-down menus can't be easily modified by users. Plan for some help from a developer to change them. This type of customization is likely to get lost in the mix after an update.
- * Some minor bugs may be encountered - report them and wait for the next update (in general)

Community Database

Probably the right choice if:

- * You have lots of couples and families making gifts as a unit - and you're okay with the extra complexity of family records.
- * You wish to keep track of rich histories of involvement in your organization.
- * You are putting lots of emphasis on cultivating major donors and foundations.
- * You have more than 32 options that you need to track for actions, issues, etc.
- * You want to use the same database for project management around events, activities, and cultivation
- * You want to easily create hand-picked lists whenever needed
- * You want to have several different types of reports right from the beginning
- * You are willing to do a little extra work to import new lists, send thank you letters, etc. - through training or scheduled support.
- * You are willing to spend 1/2 to 1 hour training all new data entry volunteers.

Potential gotcha's:

- * There isn't an organization that is heavily devoted to continual improvement, as opposed to Organizer's Database and Ebase. All current progress, and future development, results from one-on-one projects with Project Alchemy client organizations. This is our short-term response to requirements that neither Ebase nor Organizer's Database are able to meet at this time. Please be aware that the only path toward improvements and new features is through Project Alchemy fee-based services or through hands-on help from an Access developer.
- * Designed to be very flexible, the only menu option that cannot be easily modified is organization type. Plan for a few hours of development time to add new organization types.
- * Some minor bugs may be encountered - report them and expect to pay hourly fees to fix them (in general)

DonorPerfect

Probably the right choice if:

- * The organization has very sophisticated fundraising needs - robust pledge tracking, planned giving, alumni and corporate matches..

- * The organization has little staff turnover - training is expensive.
- * The organization can afford to commit to the cost of the product and the annual support fee (starting at \$700/year)
- * The organization has a traditional service provider model - there is little, if any, crossover between donors and people served, and and there is good reason for a separate database to manage the services, track clients and program statistics, etc.

Potential gotcha's:

- * Organizations with budgets that can rise and fall significantly from year to year may have difficulty retaining a commitment to an annual support plan, and renewing after a lapse can be costly.
- * Organizations with classic community organizing models will often work to build and engage a base of supporters that are, and should be, engaged in both fundraising and program work (education, advocacy, research, campaigns, etc).
- * Organizations with special needs will be limited by proprietary products like DonorPerfect. By "proprietary" we mean that they are closed and cannot be modified as needed by any qualified database developer. Rather, all future improvements must come through product upgrades or new module purchases, and so they have limited flexibility. DonorPerfect does offer customized development at a rate of \$95/hour, if a new feature or a new report is required.

Ebase

Project Alchemy is not recommending Ebase v.2.03 without careful planning, help from a consultant including a database scheduled support contract, and a solid commitment by the organization to devote a minimum of 12 hours per week for a database admin who can start out with 3 full days of training, and a 4 hour training for all additional users.

THE NITTY-GRITTY DETAILS

Individual / People Records

source code (where you found them)	y (optional)	(note entry)	
title	y (optional)	y	
first name, middle initial, last name	y		y (unlimited sal's)
suffix	y (optional)		
address	y (street #, name)	y (combined)	y (unlimited)
country field (for international work)	y (optional)	-	y
phone	y (3)	y (3 w/primary)	
email	y (1)		
"do not" checkboxes (email, phone)	y	y	
contact preference	-	y	

Organization / Group Records

organization type	y (fixed list)*	y (fixed list)**	
organization's acronym	y	-	
address	y (1)	y (1)	y (unlimited)
phone	y (1)	y (3 w/primary)	y (unlimited)
fax	y (1, optional)	y (1)	y (unlimited)
email	y (1)	y (2)	y (unlimited)
web	y (1)	y (1)	y (unlimited)
profile information	y (limited)***	y (unlimited)	y (unlimited)
roles the group plays in your organization	y****	y (unlimited)	y (unlimited)

* *Advocacy & Public Education, Elected Official/Campaign, Foundation, Grassroots, Info Clearinghouse, Legal, Media.*

** *Business, Foundation, Media, Nonprofit, Religious, Vendor, Other.*

*** *Field for area served. Also note the action/constituency/issue tracking features described below.*

**** *Two types of roles only: supporter and endorser. Space for 1 gift and 1 gift date only.*