

Decision Guide

Investing in GiftWorks™ Fundraising Software



GiftWorks™

MISSION | RESEARCH

Who We Are

Mission Research was founded in 2001 by software experts with deep ties to the nonprofit community. The company was founded by the same successful team that founded Chili!Soft.

When we set out to create GiftWorks, our flagship product, we found that nonprofit software was all very expensive, very hard to use, and poorly designed. It bothered us to see so much money spent on software and not on mission. We wanted to serve the nonprofit world by creating software that was a joy to use and that allowed nonprofits to invest more money in their mission and less on technology.

We recognize the target market for GiftWorks as small and mid-size nonprofits – a market of 1.7 million organizations. While the nonprofit business market is the fastest growing technology sector today, growing at a rate of 4% annually, most software for this sector has been targeted at large organizations. We believe that a smaller nonprofit such as yours deserves great software at a price you can afford.

Our Guiding Principles

Make it affordable. Most software for nonprofits is way too expensive. In this underserved environment, fewer than 15% of small to mid-size non-profits have commercial management software. Most end up using Excel, Access, or ad-hoc databases that do the job poorly. GiftWorks™ from Mission Research is an affordable solution. No surprises, no hidden costs. You don't have to buy support and because it's so easy to learn you're not forced to buy training.

Make it easy. We wanted GiftWorks to be different from most software: easy to use, obvious, written in plain English, and powerful enough to greatly simplify your fundraising and donor management tasks, like mail merges. That's what we achieved. Sections are on top, things you can do are on the left, and help is on the right and follows where you go.

Make it safe and powerful. We learned that most nonprofits don't trust their important information somewhere out on the Internet, so we built desktop software instead of a web-based application. GiftWorks offers you powerful tools such as a built-in importer, easy mailings, instant reports, quick lists, donor and donation tracking, volunteer management, and more. But we also knew it was important to offer certain web-based services, such as seamless updates.

Our amazing growth validates these principles that we believe in so deeply. We hope you agree our calling is a worthy one, and that we are on the right track.

Fundraising software anyone can use,
and everyone can afford.™

GiftWorks™
STANDARD

Get extra features with:

GiftWorks™
PREMIUM



DONOR AND CONTACT MANAGEMENT

- Manage all contacts, from prospects and friends to donors and volunteers – in one easy-to-use package.
- Classify your contacts into unlimited donor groups. Use these groups for analysis, reporting and targeted mailings. Groups could include board members, major prospects, volunteers and friends.
- Capture and use data about your contacts and donors, including how they found your organization, their relationships with your other contacts, membership and renewal information, and more.
- Create your own donor custom fields.
- Track all interactions with your donors automatically.
- Create tasks to schedule follow-ups. Manage tasks assigned to team members.



DONATION MANAGEMENT

- Store donor contributions and pledges with a high level of detail. Specify donation amount, giving date, method of giving, and more.
- Choose country-specific date, phone, currency format.
- Manage campaigns and analyze their success with easy campaign setups and donation segmentation.
- Further analyze donation distribution with funds management.
- Track memorials and honoraria.
- Create and manage acknowledgments and receipts with ease.



COMPREHENSIVE REPORTING

- Run reports on your donor data or for each SmartList.
- Choose from bar graphs, line charts, list reports with totals, and summaries.
- Run comprehensive standard reports, including contact reports, gift and pledge reports, and statistical reports.
- Export any report to Excel.
- Produce reports by fiscal year or calendar year.



SMARTLISTS AND MAILINGS

- Create targeted lists of donors and donations based on criteria you determine.
- Customize list views by choosing display fields and groupings. Print lists from your chosen view.
- Run powerful reports on the SmartLists you create.
- Export SmartLists to Excel with custom columns you choose.
- Send mail or email directly to your list or add to mailing lists.
- Track mailings for each recipient.
- Benefit from automatic, simple-to-run mail merge.
- Create and design unlimited letter templates for your mailings, and insert fields into letter templates for your mail merge.



DATABASE MANAGEMENT AND ACCOUNTING

- Import your data quickly and easily with GiftWorks built-in import wizard.
- Synchronize accounts and classes between GiftWorks and QuickBooks.
- Post transactions automatically to QuickBooks or import into other accounting packages.
- Back up and restore your database.
- Share your customized database template with other organizations.
- Receive all updates automatically online.



GIFTWORKS EXTRAS (add to any GiftWorks purchase)

GiftWorks™ Volunteers:

- Screen volunteers and assign volunteer managers.
- Track volunteer availability and assign them to jobs.
- Record volunteer hours and track job history.

GiftWorks™ Events:

- Track event participants from initial invitation, to RSVP, all the way to follow-up.
- Set a budget, log expenses and revenue, and calculate ROI.
- Integrate with GiftWorks. GiftWorks Events information is accessible as SmartList criteria and viewable in reports.

GiftWorks™ Online Donations:

- Collect donations from your website via a custom donation page.
- Accept recurring donations: weekly, monthly, quarterly or yearly.
- Integrate online collections with GiftWorks for complete management of campaigns and appeals.

Support:

- Annual phone support gives you access to expert help.
- GiftWorks U: Get training on using all aspects of GiftWorks.
- Data Import Services: Get help that ranges from phone support to on-site consulting.

EXTRA FEATURES WITH GIFTWORKS™ PREMIUM

- Use role-based database security to define roles for users and the level of GiftWorks access permitted for each role.
- Increase flexibility with more than 50 custom fields that can be defined to your specifications for grant management, prospect tracking and more.
- Save on mailing costs using bar-coding and bulk mail features.
- Use seasonal address management to automatically change primary donor addresses on chosen dates.

GiftWorks is proud to be endorsed by these nonprofit associations:



CONNECTICUT ASSOCIATION of NONPROFITS



IDAHO nonprofit CENTER



GiftWorks is proud to be a partner of these nonprofit associations:



Colorado NONPROFIT Association

scanpo



NH Center for NONPROFITS



in partnership with
techsoup
GLOBAL

Our customers love GiftWorks.



Now that I have GiftWorks, I can't imagine going back or using anything else. The tools are very easy to use and the steps involved in performing a task are all explained and make sense! You don't have to mess around with coding donors and volunteers. The SmartList feature lets you slice and segment your database by selecting elements from criteria to either include or exclude individuals/organizations from the final list.

I was able to cut the cost of doing an annual mailing for one of our programs by more than 85% because GiftWorks made it possible to do almost all of our printing in-house, and we were able to target specific segments of our donor database. Thank you letters can be customized to each donor and can be mailed out the same day their gift enters your office. Mission Research has a great product, with a vision for the future and customer service to match."

– Ben McLintock, Economic Opportunity Agency Children's House



I love GiftWorks. I direct a small, nonprofit literary press. We used another system that was cumbersome and confusing. GiftWorks is the single best advancement my organization has made in a couple of years. This is great!"

– Martha Rhodes, Four Way Books



GiftWorks is everything a nonprofit foundation needs and more. You can customize it to fit any type of work that you are doing. I am especially impressed with the support network with this program. Thanks for your great program and support."

– Sandy McClelland, Louisiana Governor's Mansion Foundation



I don't have a big budget for databases, so I was thrilled to find GiftWorks. This product is slick and easy to use. The set-up time alone was its most attractive selling point for me. We were going to use Microsoft Access, but that required reading a 1,000+ page user's manual and doing online tutorials and neither I nor our computer guru guy had time for that."

– Janet Kincaid, National Recycling Coalition



Your excellent customer service and my ability to give you feedback about your product have enhanced the experience. I am looking forward to further improvements. Thanks for making a great and affordable solution."

– Spencer Crandall, Cascadia Behavioral Healthcare



Before GiftWorks, we were using a customized Access database. I am just learning to use GiftWorks, but am loving all of the features. It is really helping to organize all of our donor information. Thanks GiftWorks!"

– Angela Meyers, Mental Health Association



Thanks for such a useful program and the Tech Soup-like commitment. Keep up the great support and improvements."

– Douglas Picard, Independent Fire Company No. 1, Inc

Get these benefits and more for your nonprofit.

Download GiftWorks FREE now!

missionresearch.com

888-323-8766 x2

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The GiftWorks™ Return on Investment

The Shortcomings of Most Fundraising Management Systems

Small to mid-sized nonprofits typically use one of three systems to manage their fundraising management: spreadsheets, ad-hoc databases, or expensive commercial software designed for much larger organizations. The hidden costs of these approaches can be significant.

Spreadsheets – While inexpensive to create and reasonably easy to learn, spreadsheets simply can't do the job that relational products do. It usually means an organization generates – and then has to maintain – multiple spreadsheets to get rudimentary group, mailing, and reporting capability. Not to mention secure bookkeeping support.

As the organization grows, the multiplication of spreadsheets eventually breaks down, becoming too complex to maintain even basic functionality. Before the breakdown, however, the complexity imposes efficiency limitations and inevitably fuels staff frustration, worsened by poor and inconsistent data entry.

Ad-hoc databases – These are typically custom Microsoft Access-based programs designed in house by a staff member or well-meaning volunteer. The basic risks of these approaches are:

- Lack of database or fundraising expertise on the part of the designer
- The tendency to translate only the organization's current fundraising practice into the software
- Lack of documentation, manuals or training

- Absence of customer and product support
- No benefit from the experience and ideas shared by thousands of fellow users to drive product improvements

Progress often grinds to a halt when the designer or primary expert moves on. Staff turnover can make database training, maintenance, and modifications to enhance fundraising effectiveness all but impossible.

Expensive Commercial Software – Finally, there are the expensive commercial products, typically, with real costs starting at \$5,000 per year, not including add-on modules, customization, and training. Pricing ranges from \$500 on the low end to \$30,000 on the high end, from companies like Kintera and Blackbaud, maker of the pricey and complex Raiser's Edge. By contrast, GiftWorks™ Standard pricing is \$499 per license, and GiftWorks™ Volunteers is only \$199 (available as an additional feature for GiftWorks).

GiftWorks™ Fundraising Software Is a Compelling Alternative

Depending on the size and condition of your existing database, you may incur an expensive data conversion cost. You will likely be asked to purchase software support that may be related to the number of users or number of database entries. This cost might range from \$600 to \$6,000 per year. Typically, these companies also charge significantly for training – from \$300 to \$1,200 per person per training – which can be incurred every time managers, fundraising staff, or volunteers change.

Even with this considerable commitment of resources, many organizations never utilize anywhere near the software's full capability – the software is simply too hard or too complex to learn and use.

Investing in Fundraising Software: 10 Steps to Ensure Due Diligence

by *Jessica White*

Jessica White Associates, Indianapolis, IN

THE MEMBERS OF THE BOARD OF DIRECTORS were all business executives. They knew how to run a business and they knew how to run a nonprofit. For the past year their executive director had been encouraging them to play a greater role in fundraising for the organization. She was concerned that they were not bringing in enough money. The board felt that fundraising was the staff's responsibility, so they hired an outside consultant to put together a plan to increase the amount of money they could raise. After a plan was drawn up, the consultant explained to the board that fundraising was one of their primary roles and that the new development plan outlined a significant piece of major donor work for them to do. The board refused to take responsibility for fundraising and were surprised when the organization was forced to close only eighteen months later.

After ten years, Mary, the founding executive director of a statewide agency, retired. Mary had done a great job, but it was time for someone new to take the reins. The board knew little about the operation of the agency, since the executive director had always made most of the decisions. The board quickly hired someone new to manage the agency. After all, it couldn't be that hard. Mary had done it all these years and had never had to bother them with much. How surprised they were when the new executive director found lots of problems with how the grants had been managed and announced to the board that there was little cash to run the organization. Several staff positions had to be eliminated and relationships with funders had to be repaired. How could this have happened? Mary had never told the board about any of these problems. And the board had never asked!

These scenarios are not unique. As a consultant, I come across these situations frequently. Community volunteers sign on to be board members of a nonprofit without truly understanding their roles and responsibilities. It's not enough to know how to run a business to become an effective board member. You have to know what questions to ask and you have to take the time to review the information presented to you. If the members of Mary's board had bothered to look at financial statements, they might have realized that cash flow was not sufficient to run the organization. But without delving deeper, they may have believed the agency was in good financial shape. Without understanding how grant money is received and how it must be restricted for the expenses for which it was granted, Mary's board may not have realized that the agency was co-mingling grant moneys and spending dollars that weren't theirs to spend on general operating expenses.

If you do know to ask and are able to analyze the profit and loss statement of your organization, you can still be in trouble if there isn't enough money coming in to pay the bills. Relying on your executive director or other staff to raise all the needed funds will probably cause your agency to come up short. First, the staff have limited knowledge of the potential major donors in the community. Even if they know who they are, they probably don't know them personally. It takes more than having the ability to give to make a good donor. It takes linkage, ability, and interest. Most potential donors are only going to be interested in your organization if they know something about it. That's where board members come in. You're the "linkage" to bringing donors in and getting them interested. Without good board support in fundraising, you'll find your organization like the one you read about earlier. It won't matter that you've provided good oversight if the money isn't there to support the programs.

Board members are responsible for raising the money and managing it properly. Regardless of how much you respect your executive director, these are two responsibilities you can't delegate. As they say, the buck stops here!

Key Fundraising Issues Every Board Member Should Know

As a Board Member, you are challenged with the responsibility of ensuring that your nonprofit has the tools and resources to pursue its mission effectively – yet you must consider the impact of every investment. When considering GiftWorks fundraising software for your nonprofit, consider the following:

1. If your organization uses no data management tools, or they use Excel, Access, or a database that doesn't offer all of the functionality you need, review the enclosed GiftWorks fact sheet to compare your current system to what GiftWorks offers.
2. As you complete Item 1, consider the issues where GiftWorks can deliver enhanced or totally new functionality. It is critical to explore new capacities that could be gained with GiftWorks.
3. Schedule a guided tour of GiftWorks to learn more. Sign up online:
www.missionresearch.com/giftworks/helpcenter/freeonlinetour.html
4. After the tour, invite your advancement staff to email your GiftWorks Sales contact and ask any clarification or process questions you have.
5. Visit our website at **www.missionresearch.com** and explore all the free resources we offer. There are function-specific pages, flash demos, FAQs, a Community Forum and discussion lists, and a searchable knowledge base. More is being added all the time.
6. Consider the value that GiftWorks can deliver because of its easy integration with Intuit's QuickBooks, the leading supplier of accounting software. As an Intuit Preferred Partner, we are committed to bringing the power of QuickBooks to GiftWorks users. This offers you the advantage of no double entries and a clear audit trail.
7. Google GiftWorks and see what the community is saying about us.
8. Check out our competition (you'll likely come across some when you do step 7) to see all of the fundraising and donor management tools that are available.
9. Make the decision that will help your organization advance to the next level.
10. Always remember: **Our mission is to support your mission.**