

Donor Management System Product Evaluation Checklist

Use this checklist to evaluate features of any donor management system. Provided below is an evaluation of the features found in GiftWorks.

	Feature	GiftWorks
Donor Management		
<input type="checkbox"/>	Field & screen flexibility	
<input type="checkbox"/>	<ul style="list-style-type: none"> Unlimited fields per record 	May add 24 or 110 depending on GiftWorks Version
<input type="checkbox"/>	<ul style="list-style-type: none"> User-defined fields & screen flexibility 	YES
<input type="checkbox"/>	<ul style="list-style-type: none"> Add fields 	Within Custom Fields
<input type="checkbox"/>	<ul style="list-style-type: none"> Remove fields 	Within Custom Fields
<input type="checkbox"/>	<ul style="list-style-type: none"> Change fields 	YES
<input type="checkbox"/>	<ul style="list-style-type: none"> Reposition fields 	Within Custom Fields
<input type="checkbox"/>	Unlimited codes & classifications per field/record	YES - Groups
<input type="checkbox"/>	Biographic/demographic data	YES
<input type="checkbox"/>	Prospect cultivation & tracking	YES
<input type="checkbox"/>	Donor segmentation	YES
<input type="checkbox"/>	Joint & separate giving records for other household members	YES
<input type="checkbox"/>	Multiple donor addresses & salutations	YES
<input type="checkbox"/>	Track relationships between records	YES
<input type="checkbox"/>	Smart search to easily lookup records	YES
<input type="checkbox"/>	Instant donor profile reports	YES
<input type="checkbox"/>	Unlimited notepad	YES
<input type="checkbox"/>	Multi-year donation summaries	YES
<input type="checkbox"/>	Solicitor tracking	YES
<input type="checkbox"/>	Duplicate record checking tools	YES
<input type="checkbox"/>	Setup of data entry defaults/pick lists	YES
<input type="checkbox"/>	Global change of data	YES, via SmartList
<input type="checkbox"/>	<ul style="list-style-type: none"> Track updates to records 	YES
<input type="checkbox"/>	Archive records	Via data backup
Contact Management		
<input type="checkbox"/>	Unlimited history and notes	YES
<input type="checkbox"/>	Major donor moves management	NO
<input type="checkbox"/>	Assign due dates to tasks	YES
<input type="checkbox"/>	Automatic To-Do/Tickler List	YES
<input type="checkbox"/>	Tracks each contact item	YES
<input type="checkbox"/>	Automatic logging of e-mails, solicitations and thank-yous	YES
Mailings and Communication		
<input type="checkbox"/>	Create personalized solicitations, thank-you letters, and other correspondence	YES
<input type="checkbox"/>	Instant e-mail or letter from record	YES
<input type="checkbox"/>	Mass mailings	
<input type="checkbox"/>	<ul style="list-style-type: none"> Ability to select full or subset of donors 	YES

	Feature	GiftWorks
<input type="checkbox"/>	• Mail to multiple addresses for donor	YES
<input type="checkbox"/>	• Automated mailing restrictions option (No mail, no solicitations, etc.)	YES
<input type="checkbox"/>	• Produce appropriate letter (based on thank you code)	YES
<input type="checkbox"/>	• Feature to ensure all gifts are acknowledged only once	YES
<input type="checkbox"/>	• Print address labels	YES
<input type="checkbox"/>	• Bulk mail reports	YES
<input type="checkbox"/>	• Exports to mail houses	YES
<input type="checkbox"/>	E- mails	
<input type="checkbox"/>	• E-mail personalization	YES
<input type="checkbox"/>	• Broadcast email messages, campaigns	YES
<input type="checkbox"/>	• HTML formatted	YES
<input type="checkbox"/>	• Surveys	NO
<input type="checkbox"/>	Maintain mailing history	
<input type="checkbox"/>	• Track solicitations, acknowledgments/thank-you letters	YES
<input type="checkbox"/>	• Track success of solicitations	YES
Gift Management		
<input type="checkbox"/>	Unlimited gift history	YES
<input type="checkbox"/>	Unlimited gift coding	YES
<input type="checkbox"/>	• Campaigns	YES
<input type="checkbox"/>	• Appeals	YES
<input type="checkbox"/>	• Fund designation	YES
<input type="checkbox"/>	Automatic summary of gifts by:	YES
<input type="checkbox"/>	• Year	YES
<input type="checkbox"/>	• Type	YES
<input type="checkbox"/>	• User specified criteria	YES
<input type="checkbox"/>	Allows assignment of appropriate acknowledgements at entry	YES
<input type="checkbox"/>	Receipts	YES
<input type="checkbox"/>	Split gifts	YES
<input type="checkbox"/>	Honorariums and memorials	YES
<input type="checkbox"/>	Gift batching and audit trails	YES
<input type="checkbox"/>	Deposit slips	YES - via integration with QuickBooks
<input type="checkbox"/>	Soft credits	YES
<input type="checkbox"/>	In-kind gifts	YES
<input type="checkbox"/>	Matching gifts	YES
<input type="checkbox"/>	Anonymous gifts	YES
<input type="checkbox"/>	Import online & EFT donations	YES - via GiftWorks Online Donations Add- In
<input type="checkbox"/>	Giving Analysis Reports	
<input type="checkbox"/>	• LYBUNT	YES
<input type="checkbox"/>	• SYBUNT	YES
<input type="checkbox"/>	• Largest	YES
<input type="checkbox"/>	• Most Recent	YES
Pledge Processing		
<input type="checkbox"/>	Track pledges	YES
<input type="checkbox"/>	Track unpaid pledge balances	YES

	Feature	GiftWorks
<input type="checkbox"/>	Unlimited payment schedules	YES
<input type="checkbox"/>	Automated pledge reminders	YES
<input type="checkbox"/>	Pledge reminder letters	YES
<input type="checkbox"/>	Credit card payments	YES - via GiftWorks Online Donations Add- In
<input type="checkbox"/>	ACH payments	YES - via GiftWorks Online Donations Add- In
<input type="checkbox"/>	Reports & Analysis	
<input type="checkbox"/>	• Delinquent pledges	YES
<input type="checkbox"/>	• Pledge listings	YES
<input type="checkbox"/>	• Cash flow projections	YES
Reporting and Analysis		
<input type="checkbox"/>	Large selection of pre- defined reports	
<input type="checkbox"/>	• Statistical analysis	YES
<input type="checkbox"/>	• Solicitation analysis	YES
<input type="checkbox"/>	• Income analysis	YES, in addition to Event Specific analysis via the Events Add- In
<input type="checkbox"/>	• Donor profiles	YES
<input type="checkbox"/>	• Campaign analysis	YES
<input type="checkbox"/>	• Graphical analysis (via export to graphic tool)	YES - can export to Excel for use in Excel, PowerPoint, Crystal Reports; plus most reports are offered graphically within GiftWorks
<input type="checkbox"/>	Pre- designed Report Customization	
<input type="checkbox"/>	• Ability to filter report by any criteria	YES
<input type="checkbox"/>	• Ability to modify fields/format of report	YES- field choices and subtotals, plus graphic options
<input type="checkbox"/>	• Ability to modify the sort order of report	YES
<input type="checkbox"/>	• Report/Process Filters (queries)	YES
<input type="checkbox"/>	• Ability to create and save custom filters	YES
<input type="checkbox"/>	• Select on any field or combination of fields	YES
<input type="checkbox"/>	• Full range of comparison criteria (=, >, contains, etc.)	YES
<input type="checkbox"/>	• Report Sort Options	
<input type="checkbox"/>	• Ability to create and save custom sorts	YES
<input type="checkbox"/>	• Ability to sort on any field or combination of fields	YES, combination (sub sort) requires export to Excel
<input type="checkbox"/>	Custom Report Writer	
<input type="checkbox"/>	• Ability to create custom reports in a variety of formats	YES, based on selection of SmartList universe, column headings, sort, subtotals and report format (list, summary, pie, line or bar chart)
<input type="checkbox"/>	• Include any fields, including user-defined fields	YES
<input type="checkbox"/>	• Save reports for future use	NO
<input type="checkbox"/>	• Sort, select and sub-total on any field	YES
<input type="checkbox"/>	• User-determined ranges, summaries, counts and totals	YES
<input type="checkbox"/>	• Use any formats, fonts, spacing, colors, images, and placement	NO
<input type="checkbox"/>	• Ability to print, preview on screen, or save as file	YES
<input type="checkbox"/>	• End-user appropriate tool or programmer's tool	End user

	Feature	GiftWorks
Membership Management		
<input type="checkbox"/>	Track membership levels, dues, and renewal	YES
<input type="checkbox"/>	• Print/e-mail renewal notices	YES
<input type="checkbox"/>	• Manage multiple membership levels	YES
<input type="checkbox"/>	• Track gift memberships	YES
<input type="checkbox"/>	• Reports	YES
<input type="checkbox"/>	• Acknowledgements	YES
<input type="checkbox"/>	• Custom membership cards	NO
<input type="checkbox"/>	• Membership analysis	YES
<input type="checkbox"/>	• Membership lists	YES
Special Events Manger		
<input type="checkbox"/>	Banquets, dinner dances and shows	YES
<input type="checkbox"/>	Walk-a-thons, bike-a-thons, telethons	YES
<input type="checkbox"/>	Auctions	NO
<input type="checkbox"/>	Golf tournaments	YES
<input type="checkbox"/>	Sponsored events	YES
<input type="checkbox"/>	Track registration and actual attendance	YES
<input type="checkbox"/>	Manage guests and seat assignments	YES
<input type="checkbox"/>	Track volunteers assignments	YES
<input type="checkbox"/>	Payments	YES
<input type="checkbox"/>	• Online	NO
<input type="checkbox"/>	• Offline	YES
<input type="checkbox"/>	Issue/create tickets	NO
Volunteer Management		
<input type="checkbox"/>	Maintain contact data	YES - via Volunteers Add-In
<input type="checkbox"/>	Track skills and interests	YES - via Volunteers Add-In
<input type="checkbox"/>	Committee assignments	YES, using Groups
<input type="checkbox"/>	Track availability	YES - via Volunteers Add-In
<input type="checkbox"/>	Create/maintain schedules	NO
<input type="checkbox"/>	Track actual work time	YES - via Volunteers Add-In
Grants Management		
<input type="checkbox"/>	Calendar for grants deadlines	YES - via Custom Fields
<input type="checkbox"/>	Track proposal tasks	YES - via Custom Fields
<input type="checkbox"/>	Research (interface with grants research capabilities)	NO
<input type="checkbox"/>	Track grant disbursements	NO
<input type="checkbox"/>	Distinguish between requested & actual funding	YES
<input type="checkbox"/>	Track grant funding status	YES
Student/Alumni Features		
<input type="checkbox"/>	Schools attended	YES - via Groups or Custom Fields
<input type="checkbox"/>	Graduation year	YES - via Groups or Custom Fields
<input type="checkbox"/>	Major	YES - via Groups or Custom Fields
<input type="checkbox"/>	Student/Alumni reports and mailings	YES
Accounting Interface		
<input type="checkbox"/>	Interfaces to accounting application	
<input type="checkbox"/>	• QuickBooks	YES
<input type="checkbox"/>	• American Fundware	NO

Feature		GiftWorks
<input type="checkbox"/>	• MIP	NO
<input type="checkbox"/>	• Great Plains	NO
<input type="checkbox"/>	• Others	
Network/Multi- User Functionality		
<input type="checkbox"/>	Password controlled use by unlimited number of users	YES - in GiftWorks Premium
<input type="checkbox"/>	Audit trail of user entry	NO
<input type="checkbox"/>	Data access defined by user rights	YES - in GiftWorks Premium
Internet Functionality		
<input type="checkbox"/>	Online Transaction Processing	YES- via GiftWorks Online Donations Add- In
<input type="checkbox"/>	• Donations	YES
<input type="checkbox"/>	• Event registration	NO
<input type="checkbox"/>	• Fundraising item sales	NO
<input type="checkbox"/>	Opt-in prospect/e-mail collection	NO
<input type="checkbox"/>	Browser-based version	NO
Product Support		
<input type="checkbox"/>	Includes product updates	YES- via SmartPlan
<input type="checkbox"/>	Frequency of updates_____	YES- annually, in September
<input type="checkbox"/>	Phone support	YES- via SmartPlan or alá carte
<input type="checkbox"/>	Hours of operation	8am- 5pm EST
<input type="checkbox"/>	Support department size	Phone support response time within 1 hour
Training		
<input type="checkbox"/>	Classes (Offered where?)	YES- Online
<input type="checkbox"/>	Cost	\$349 for GW University 5- session certification
<input type="checkbox"/>	On-site	\$1,500 per day
<input type="checkbox"/>	Telephone	NO
<input type="checkbox"/>	Web	YES- see above
Other Services		
<input type="checkbox"/>	Data Conversion	YES
<input type="checkbox"/>	Data Enhancement	NO
<input type="checkbox"/>	National Change of Address (NCOA)	YES
<input type="checkbox"/>	Prospect Research	NO
<input type="checkbox"/>	Phone and/or email appending	NO
<input type="checkbox"/>	Online Support Tools	NO
<input type="checkbox"/>	Newsletters	NO