

Membership Database Selection Part 1 - Defining Your Needs (Wild Apricot Blog)

What are your membership database requirements?

This is the first in our 3-part blog series on membership database selection. We created this series in response to our Blog Reader Survey, where readers told us that finding ways to better manage their scarce resources and membership databases was a key issue facing small associations and non-profits. This blog series is designed to help organizations: identify your membership database requirements (Part 1); understand the various options available ([Part 2](#)); and determine the best membership database solution that meets your specific needs ([Part 3](#)).

A membership database is the heart of any association, non-profit or club. After all, your members, supporters and/or volunteers are the foundation on which your organization was built, so it's care and maintenance are key to a solid structure. Robert L. Weiner spells this out nicely in [Why You Need a Donor Database](#):

- *Data is one of your most critical assets. Protect it and use it well.*
- *A database serves as your "institutional memory." If someone leaves your organization, the database should allow her successor to pick up where she left off.*
- *A good database helps you work smarter, faster, and more effectively.*

But many small organizations struggle to keep their member, volunteer and contact information up-to-date. This is especially true if you are using spreadsheet software and sharing these files with other staff or volunteers, which can lead to multiple, duplicate and/or outdated records. If you face these challenges, it may be time for your organization to take a good hard look at your current software. As we noted in an earlier post, [Have You Outgrown Your Membership Database](#), moving to a single, centralized database management system can ensure: data integrity; ease of use as well as the ability to produce reports and use the data for other purposes, such as renewals, email and social media outreach. With the right database, your organization can be more effective, spending valuable staff and/or volunteer time on activities that further your mission, and less time on administrative clean-up.

Before you can go shopping for new membership database software, you need to figure out your specific needs. In this post, we're going to outline some of the steps you might want to take to identify your requirements so you can be sure that you find a solution that will fit all of your current and future needs.

Step 1: Gather a Selection Team

It might help to create a "selection team" or committee that can work together to identify your organization's needs. This selection team should include those who will be using the software - staff and volunteers. Having all users involved should ensure that you identify not only all of the key requirements, but also set realistic expectations of both the software choice and the skills of those who will be using it. As Robert Weiner suggests in an Idealware article, [Ten Common Mistakes In Selecting a Donor Database](#), "complex software requires your staff to have more computer skills, not less. Under-trained staff, poor communication, dysfunctional business processes, and poor management will not be solved by new software."

Step 2: Define Your Needs

While you may find the process of capturing all of your requirements a little daunting, don't be intimidated. You simply need to create a detailed list of **what you want the software to help you with**. When creating the list of your organization's needs, think about things like:

- **Who will use this database** (e.g., one staffer; numerous administrators; board members; volunteers)?
- **Each user's needs, such as:**
 - remote access vs in-office access
 - view vs. edit access
 - their technical proficiency

- their organizational skills (e.g. if they were using a spreadsheet, could you trust them not to mess up your spreadsheet template)
- **What type of records you need to store:**
 - members
 - volunteers (by project /involvement?)
 - contacts (e.g., sponsors, speakers, networked organizations, etc.)
 - donors/supporters
 - prospects
- **How many total records** will you need to store?
- **What information you need to capture?**
 - basic data for all records (name, email, address, tel #, etc.)
 - any data specific for certain types of records
 - membership: renewal date / status / member ID
 - any committees/groups/special privilege
 - event history, donation history
 - volunteering history
 - account balance
 - relationships (e.g. same household, spouse, multiple records under same corp. membership)
 - communication preferences (e.g. send newsletters/not)
 - professional certification
 - continuing education credits
- **What functions do you need:**
 - report generation (what specific kinds of reports?)
 - mail merge for email and postal mail, badges
 - export for use in any other tools/systems
 - internal workflows (communications, actions, notes)
- **Data security and backup** considerations

Step 3 - Prioritizing and Clearly Defining Your Requirements

Once you've drafted your requirements, you need to rank or prioritize these and determine which are "Essential" or "Nice-to have". By clearly identifying and ranking your needs and by taking a team approach, you should avoid one of the pitfalls that often occurs - making a quick selection based solely on one individual's personal preference or vendor pitches rather than on your organization's specific needs. If you are planning to create an [RFP](#) (request for proposal), remember that you need to clearly define your objectives as well as your technical requirements. While we can't go into detail on RFP preparation in this blog post, Wild Apricot will be producing a **Membership Database Selection Guide** in the near future that will offer additional information and tools. If you'd like to review an Association's RFP for an Association Management System, check out the sample we've included below in the "Read More" section.

Next Steps...

Once you've identified your organization's needs, you can start to look at the possible options that may work for you. Your specific requirements will determine the type of software or system you should look at. For some organizations, this may mean considering a full [Association Management System](#) "that offers database features to run operations, such as member services, event management, communications, product databases and fundraising" such as [Wild Apricot](#). Other groups whose focus is solely on fundraising and donor database management might look at commercial off-the-shelf options. Stay tuned for [Part 2 of our blog series](#) that will review the various membership database options or choices.

Remember, the time you spend identifying your needs and analyzing your options will be well worthwhile. As Wes Trochllil of EDM suggests in his article, [Your Database as Member Relations Tool](#), in this economy, "you really have to start leveraging your database and the data you have. ...If you use your data wisely, you'll be able to communicate with [members] in a manner that resonates, and you'll enhance the bond between them and your organization. Your database and your data can help you do this.

Watch the Wild Apricot blog in the coming weeks for [Membership Database Selection Part 2 - Understanding Your Choices](#).

Read more:

In the meantime, if you want to further explore this topic, here are a few other resources:

- [Finding the Perfect Donor Database](#) - Wild Apricot blog post
- [Internet Society - Association Management System RFP](#) - this is a detailed RFP for full Association Management Services for an international association
- [Back Away From That Spreadsheet: Why Excel Isn't a Donor Database](#) - Idealware article by Robert L. Weiner
- [Why you Need a Donor Database](#) - Robert L. Weiner, Network for Good blog
- [Nonprofit Database = Golden Goose](#) - ImpactMax blog post

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<http://www.wildapricot.com/blogs/newsblog/archive/2011/03/16/membership-database-selection-part-1-2D00-Defining-Your-Needs.aspx>

Membership Database Selection Part 2 - Understanding Your Choices (Wild Apricot Blog)

This is **Part 2** of our [3-part blog series](#), created to help small membership and non-profit organizations select a membership database that meets your specific needs. As we noted in our last post, a membership database is the heart of any association, non-profit or club. It serves as your "*institutional memory*," keeping track of your members, supporters, donors and/or volunteers - the foundation on which your organization was built. It's therefore important to ensure you have the software, system and processes in place to update, protect and efficiently use this important data.

In [Part 1](#), we recommended that you start the database management selection process by identifying your specific needs or requirements. We also suggested some of the things you need to think about when developing your list of requirements, such as: the type of records you need to store (members, volunteers, donors) and the number of records; the information you need to capture about each of these members/volunteers/donors; what you need to do with these records (e.g., reports, invoicing, etc.); inter-relationships between records (e.g., relationship tracking or linking of records); and how many users will use it and how they need to access the system.

Your requirements will help you determine what options to consider

With this information gathered, you can start to identify the type of tools that are available to fit your needs. For example, if you are currently using a spreadsheet, but need to keep track of financial information for each member (e.g. membership fees), or you need to sort events by people and people by events - you'd need multiple data tables that could be cross-referenced. (For these more complex requirements, you'll need a system based on a [relational database](#) in which multiple data tables are related to one another through a common identifier.)

The number of administrators and/or locations in which you'll use the system will also impact the type of option to consider. For example, if you know you'll have multiple users (e.g., staff and/or volunteers) that will need to access the software from a number of computers, you should probably consider an **online or web-based system** that all users can access easily via any web browser. If, on the other hand, you have one administrator in one location, you could look at desktop software that runs on a sole computer (e.g., off-line).

While your situation will determine whether online or off-line applications make the most sense, there is another factor to consider in making your choice - whether you want package or custom software - *that your organization buys and installs on your own computers* - or software-as-a-service (SaaS) - *web-based software that is hosted "in the cloud," for which you pay a fee.*

What are your options?

In this post, we'll look at the various tools and options available, as well as some of their pros and cons in terms of meeting non-profit/membership needs. As you weigh the various options against your requirements, it's important to remember that you want to identify a system that works for you and what you need to do. But keep in mind that realistically, you'll also need to balance efficiency and cost when making your ultimate choice.

The following is an overview of the types of software applications (off-line) and online or web-based association/membership management systems that are available to help you manage your membership database, including:

1. Spreadsheets
2. Contact Management Databases/Systems
3. Generic Databases
4. Membership/Association Management Systems
5. Custom Software

1. Spreadsheets:

Many organizations may have started out keeping their member, volunteer or donor lists on spreadsheet software, such as Microsoft Excel. But as Robert L. Weiner suggests in [Back Away from the Spreadsheet: Why Excel Isn't a Donor Database](#), "Excel is great with numbers, and can track small groups of prospects or activities. But it has some critical limitations. Most notably, Excel stores information in what's called a "flat file" database. This means it's not designed to handle relationships between data, such as when one record (like a donor) needs to link to several other records (like gifts). And it doesn't provide a wide variety of features that make tracking efficient and less error prone."

Online Spreadsheets (such as Google docs or Zoho) are very similar to desktop spreadsheet software, but can be accessed by multiple users due to their online connectivity.

2. Contact Management Databases/Systems:

If your key requirement is managing contacts, there are many types of content management systems. For example, Microsoft Outlook is a basic contact management software. As Wikipedia suggests, "although often used mainly as an e-mail application, it also includes a calendar, task manager, contact manager, note taking, a journal and web browsing. It can be used as a stand-alone application, or can work with Microsoft Exchange Server and Microsoft SharePoint Server for multiple users in an organization."

Another type of software closely related to contact management application is [CRM](#) (customer relationship management) software. These systems focus on automating and tracking interactions with your customers (or constituents) - emails, letters, phone calls, etc. The biggest and most well known online CRM is Salesforce.com, which offers a special non-profit version.

3. Generic databases:

There are a number of relational database software programs - both online and off-line. Filemaker Pro, is an example of a generic database application, described in [Wikipedia](#) as "a cross-platform database program that integrates a database engine with a GUI (graphic user interface)-based interface, allowing users to modify the database by dragging new elements into layouts, screens, or forms." In a [TechSoup article](#), Chris Peters suggests that "desktop database applications such as FileMaker Pro are intended for small groups of collaborators, usually working in the same office."

Microsoft Access is an example of an online database that allows you to create database applications using a web browser and import data and export data in a variety of formats using its graphical user interface and software-development tools. Zoho Creator is a cloud-computing database platform that drag-and-drop interface, business rules and workflow, reporting and collaboration.

While generic database programs can be very flexible, they often require a lot of initial setup and customization in order to meet your organization's specific needs.

4. Membership/Association Management Systems - Specialized for Non-profits / Membership Organizations:

There are a number of web-based or online membership databases (sometimes also referred to as AMS - [Association Management Systems](#) - though these two terms might be slightly different) that are specifically designed with non-profits or membership-based organizations in mind. Along with [Wild Apricot](#), there are a number of providers of membership software (e.g., MemberClicks, YourMembership.com and Membee) that offer an online member database (including online interactive membership applications and member directories) that link to your website and other tools that can help you organize and communicate with members. These enable you to move your current membership list into a single online master database with no hardware or software installation required. With a web-based system, volunteers can sign up and update the master list whenever and wherever they choose, with no duplication. With providers, such as [Wild Apricot](#), you can also integrate your member database with your website; use automated communication tools and an integrated event management module.

Another closely related type of software is donor management database. There are web-based solutions (such as Blackbaud's eTapestry or Raiser's Edge) that combine donor database management, with online fundraising and other web tools.

Benefits to a Centralized Membership Database

In his article, [Why You Should Have a Centralized System](#), Wes Trochilil notes that there are four benefits to a centralized database:

1. **Data Integrity** (e.g., no redundancy);
2. **Valuable broad marketing info/history** (centralized information enables easier report development)
3. **Ease of training** (it's the same system for everything);
4. **Support** (support is focused on one product)

What's the difference between desktop software and a web-based membership management system?

On [Quora](#), users were asked to identify the pros and cons of using online databases, like Wild Apricot versus desktop software like Excel to manage members / donors. One user noted that *"the biggest and most immediate advantage over Excel that I've seen is the ability to generate specific queries and reports about our donors. Some of the additional immediate benefits I've enjoyed include the ability to generate correspondence (e.g. thank you letters) quickly, using the system's customizable templates; to process credit card donations directly through the service; and to create a searchable and sortable record all in one place of the donor's history with our agency and relationships with other donors in our system."*

5. Custom Software - desktop or web-based

In [Finding the Perfect Fundraising Software in an Imperfect World](#) (PDF), Robert Weiner cautions that having custom software developed should be your last resort. He notes that having custom software developed is a risky and usually costly endeavor. Some of the problems with custom software, he suggests can include: *"requirements that weren't clearly understood or articulated by the organization or were constantly changing; bugs are never fixed; or reports and documentation that never got written. In addition to this being an often very costly process, there can also be issues around the ability to update or revise based on changing needs, not to mention problems around on-going maintenance, support and training."* Unless your requirements are entirely unique you should be able to work within existing desktop or web-based solutions.

Cost Considerations

There are a number of considerations when thinking about the cost of a database system. The cost of the software is of course one. The options we've listed here range from free (e.g. Google spreadsheet) to hundreds or even thousands of dollars per month (e.g. a high end AMS). But, there may be other costs to consider. For example, the extra time and energy required setting-up a generic database to meet your needs should be factored in. Also, if you have existing records in older formats, there may be costs associated with data conversion. And on top of direct software costs, you might find there are additional fees such as software set-up and installation, hosting and technical support agreements that will add to the total bill.

Once you've had a chance to carefully review all of the various software and systems based on your specific needs, you can narrow down your options and begin to create a list of potential candidates.

If you want to get started with an AMS (Association Management System) selection, you can check out our [Software Selection Guide](#).

<http://www.wildapricot.com/blogs/newsblog/archive/2011/03/23/membership-database-selection-part-2-understanding-your-choices.aspx>

Membership Database Selection Part 3 - Making Your Choice (Wild Apricot Blog)

This is the final post in our 3-part Membership Database Selection blog series.

In [Part 1](#) we suggested you start the process by creating a selection team and offered some things to consider in identifying and prioritizing your specific needs or requirements.

We followed this in [Part 2](#) by offering an overview of the various membership database software and system choices, along with some guidance on how to figure out which option best suits your needs.

So now that you've defined your requirements and identified the type of software/system you're after, in this final series post, we're suggesting the steps you can follow to choose the right solution.

Creating a Short List

Once you've determined the type of software/system you're looking for (e.g., spreadsheet, database, contact management, fundraising/donor management or an integrated AMS (Association [or membership] Management System), you can develop a short-list of vendors to evaluate.

You may already have a list of potential providers, but if you're just getting started, you can identify candidates by:

- **Asking around.** Talk to people in similar organizations about what software they are using, and what they like or dislike about it.
- **Do a Google search** — for example on "membership management software" — and browse through the first 20-30 results to see if anything looks interesting.
- **Check a software directory**, for example [Capterra](#).

It can be easy to get overwhelmed by options, so one easy filter for shortlisting candidates might be looking at a ballpark pricing level. Another is to check to see if the provider offers a video, detailed tour or ideally a trial account so you can check out their product first hand on your own.

Once you've identified 5-10 potential candidates, your selection committee can take a close look at whether/how these providers meet your requirements.

Analyzing Against Your Requirements

First – a word of caution about what **NOT TO DO: DO NOT** send your list of requirements to vendors and ask them to fill it out. This can be a pointless exercise for two reasons:

1. High-level requirements are hard to interpret.
2. Salespeople are eager to please and will tend to mark "Yes" for all requirements... even if they have no idea what you meant.

What SHOULD you do?

1. As best you can, review each of the short-listed providers against the requirements you identified.
2. If you have signed up for a trial account, choose several (e.g., 3) common scenarios for your typical data-processing tasks and evaluate how complete the software is and how easy the tasks are to accomplish. You'll also be able to evaluate the system for ease of use, tech support and documentation if you are able to test through an actual trial account.

For example:

- Have a member register
- Find a membership record and make updates
- Run a specific report

Evaluation tool: We created a [Membership Software Comparison Matrix \(Excel file\)](#) as part of our Software Selection Guide. While this was designed to compare AMS programs (like [Wild Apricot](#)) that offer full website, membership management, event and fundraising capabilities, you could use this as a guide or simply use the fields that make sense for your needs.

Evaluating Vendors and Testing Software

While you need to check against your specific requirements, we've compiled a list of some other aspects that we believe you should also consider during your review: Ease of Use; Support & Service and Vendor Reliability.

1. Ease of Use – Test it:

While every software vendor (including Wild Apricot) will tell you that their software is easy to use, everyone has different levels of technical skill, knowledge, and prior experience that will impact how easy it is for them to use a piece of software. When evaluating systems for ease-of-use consider:

- Getting access to a full trial version of the software. Canned demos are no substitute for trying out the software yourself.
- Choose several volunteers from your team to test the trial version and select several typical tasks you want to do in your software. Ask your volunteers to rate the ease of use for each system for each task.

2. Support and Service:

If you are looking at desktop or packaged software, you install it, run it and often never come in contact with the software vendor. But while you may not be concerned about an on-going service relationship, you should ensure that there is adequate in-package and/or online orientation and training so that current and future users can effectively use the software.

But if you are selecting web-based software, also known as Software as a Service (SaaS), there are a number of other aspects to consider, besides system functionality – and they are all about service! Find out which of the following the provider offers in terms of support options:

- Online support (via the website)
- Online chat
- Email
- Phone

Also be sure to ask what their tech support covers, and what it doesn't cover? Costs? Availability (work days, 24/7, etc.). Check out the support for yourself - ask specific questions and rate the answers and the response timelines.

3. Vendor Reliability:

Evaluating vendor reliability is a difficult, but important exercise in due diligence. This is especially important for web software, since it lives on the vendor's servers. Review the following information for each potential SaaS provider:

- **Check user Testimonials and Reviews:** Honest feedback from existing software users can be an extremely important factor in your decision-making process. But the key word is "honest." Take a look at:
 - Each potential provider's customer testimonials and client references. Some vendors, like Wild Apricot for example, [publish a full list of raw comments from our regular customer reviews](#) — the good, the bad (grammar), and the ugly!
 - Conduct a Google search. Look for "XX software user reviews" or even "software XX sucks." You may have to wade through many pages of search results to find useful and unbiased user feedback.

- Reviews on third-party sites such as [LinkedIn](#) can be insightful
- Software discussion forums: Even if these are hosted by the vendor, take some time to read the comments to see what people are asking and complaining about — and how the vendor responds.
- **Company image/reputation:**
 - Is it clear who is behind the company? Who and how big is the team?
 - How long has it been in business? This doesn't mean you should exclude young companies — but evaluate them carefully and weigh their reliability with all other aspects.
- **Security:** This is a big issue for online providers. Some security questions to consider:
 - Are there individual passwords for each user (administrator and member)?
 - Are the passwords stored in the database encrypted?
- **Upgrades & Product Roadmap:** You might want to check to see if the product/service has a viable roadmap for ongoing development and improvement. It can also be important to see how open the vendor has been to feedback from their user community in terms of their product updates.

Reviewing Costs

Key Cost Components:

It is not always easy to compare pricing between different vendors. But here is a list of the most common cost components that apply to web-based membership management software:

- Initial setup cost
- (Main) ongoing charge — monthly or annual (might depend on specific modules)
- Per-member surcharge
- Per-transaction charges (% or \$)
- Technical support fees
- Update charges

Of course, this list will not cover all situations — you need to ask the vendor explicitly if they have any other potential surcharges, such as:

- Bandwidth charges
- Storage space charges
- Per-event-registration charges
- Per-email-sent charges

Potential Additional Costs:

Keep in mind that in addition to the software, there are other costs involved in your project. These costs may not be critical from a software selection perspective, since they are likely to be similar among different vendors. These costs will also depend on who will be doing each particular task — your staff or volunteers, or an external service provider:

- Initial setup of the system — all the system settings
- Contact/member database transfer
- Functionality customization and tweaks. *(Be careful here! Of course you want the system to be tailored to your needs, but the costs can easily spiral out of control. Also, think about whether these customizations will be compatible with future versions of the software.)*

As part of our Software Selection Guide, we prepared a spreadsheet calculator to estimate and compare the total cost for a number of systems. While this is designed to compare AMS providers, have a look and see if it is helpful. You'll find the link to our **Price Comparison Spreadsheet** at <http://www.wildapricot.com/guide>.

Making Your Selection:

If your selection committee has carefully defined your requirements and you have evaluated your short-listed vendors' features, ease-of-use, service abilities and reviewed the total costs involved, you should be able to make an effective membership database software/system choice. Just be sure you don't fall prey to any of the common mistakes that Robert Weiner identifies in his [Ten Common Mistakes In Selecting Donor Database](#), such as:

- letting techies make the decision [alone];
- prioritizing price above everything else;
- falling in love with cool features (or with the salesperson);
- confusing highly functional software with highly trained staff.

We understand the importance of this selection process. After all, your membership database is the foundation on which your organization was created as well as the tool that will enable future growth. We hope our blog series has helped you identify and prioritize your requirements ([Part 1](#)); understand your software/system options ([Part 2](#)) and figure out the right choice to meet your specific needs (Part 3).

<http://www.wildapricot.com/blogs/newsblog/archive/2011/04/04/membership-database-selection-part-3-making-your-choice.aspx>