Donor Management Software Checklist

Use our checklist to assess your nonprofit's need for donor management software and help you prioritize the features you need most.

Step 1: Assess your organization's current data processes:

Type of information	Where is it stored today?	Need improvement?
Types of data Contacts/Addresses Relationships Meeting notes Tasks Major donor notes Volunteer hours Volunteer interests Members/memberships Donations Acknowledgments Solicitations Communications Events Event Attendees _____ _____ _____ _____	**Example:** Google sheets, email provider, Excel, other	**Example:** Yes, need to consolidate into one system

Step 2: Prioritize your organization's donor management software needs

Once you've identified your must-haves, compare them with your selected donor management system's <u>features list</u>

Feature	Must have	Nice to have	Not req'd	Comments
System requirements				
Cloud-based				
Backups				
Secure User Login				
Unlimited users				
Documentation and training				
Saved searches and reports				
Donor Management requirements				
Data import/export				
Gift tracking				
Pledge tracking				
Mailings				
Event Management				
Volunteer Management				
Credit card processing				
Cutsom report builder				
Grant management				
Emailing				

Adapted from <u>http://www.fundraising123.org/files/donor+management+toolkit+book.pdf</u>