

MORE DONORS MANAGED IN THE CLOUD

Transition from resident data systems hurdling forward



Gathering at the annual AIDS Walk Atlanta and 5K Run

By DON McNAMARA AND PATRICK SULLIVAN

Edward Doolittle, development officer of Aid Atlanta, has seen the benefits of hosted donor management from two perspectives: as a paid employee and as a volunteer.

As the organization's development officer, Doolittle has enjoyed the enhanced ease of access that hosted donor management has given his organization.

It's about more than him being able to do his job better. "Just being able to free up a server and free up our IT department, and the price of hosting came down, as well as staff time, I would have to say as a guesstimate that we're saving several thousands of dollars a year," Doolittle said. "Unrestricted money can go right where you need it most."

It's the nonprofit bottom line. "The more efficient you can be, the more money can go to people the organization's mission is all about," Doolittle said.

He also volunteers at For the Kid in All of Us, an all-volunteer organization to help Georgia children in need. "There's no centralized office, so using (Blackbaud) Raiser's Edge helps keep costs down," Doolittle added.

Chris Kennedy, development officer



School children in Lusaka, Zambia, crowd around IMB missionary Troy Lewis, whose primary focus involves ministering to those impacted by the AIDS crisis.

of International Mission Board (IMB), wants relationships, lots of them. The past year or so of using a mobile application technology has made him confident that he will be getting what he wants down the road.

Down the road is a good metaphor for Kennedy, who works for an organiza-

tion headquartered in Richmond, Va., but lives near Fort Worth, Texas. "For a development officer, it's a numbers game. But it's not about numbers, but relationships. So for me, the ability to get in front of more people increases as I can get more information about more people. I will have the ability to have

more relationships," he said.

Kennedy said it's important to be able to quantify the relationships. "When it comes to accessing wealth data, donor management software enhances my ability to qualify a constituent on the spot before I walk in the door," said Kennedy.

That might mean more work for Kennedy, but he's ready for it. "I feel that the impetus for a development officer's success is that person's ability to be in front of constituents, not a computer. As mobile access to constituent data increases so go excuses for neglecting face-to-face contact."

Security concerns have made some nonprofits reticent to switch from on-premise software to hosted software. Ron Rainville, vice president of service delivery options for Blackbaud, compares the care and scrutiny needed with the care accorded to America's space program. "We just established our 7-by-24-hours operations center here in Austin," said Rainville, relating it to NASA's Johnson Space Center in Houston, which tracks space flights every second, alert for any eventuality.

Cloud-based donor management systems (software-as-a-service, SaaS) are be-

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Unrestricted money can go right where you need it most. --Edward Doolittle of Aid Atlanta

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coming old hat. With this migration comes a bolstering of security. The good news for anyone shopping for a new system is few vendors have raised prices since last year. Savvier consumers are beginning to realize that the data security concerns that proliferated in the cloud's early days are largely being alleviated because of increased visibility of and comfort with the cloud.

"There's not as many security concerns with the cloud as one would think," said Elizabeth Pope, senior researcher at technology nonprofit IdealWare in Portland, Maine. Vendors will "have redundancy systems set up where you have constituent data backed up in different

places. A lot of nonprofits have security issues of their own with an on-premise database." Pope added that when a nonprofit partners with a cloud vendor, it's the vendor that handles the security.

"As (security matters) become more complex, organizations realize this isn't their specialty," said Bob Girardi, vice president of product development for SofTrek, makers of ClearView CRM, in Amherst, N.Y. "They recognize that data is better off in the cloud." Most nonprofits don't approach the level of security and redundancy provided by application vendors."

Brendan Noone, chief operating officer of Z2 Systems in Chicago, said he's grateful that customers are becoming more knowledgeable about and com-

fortable with the cloud. "We don't have to spend as much time defending the cloud," he said. "People see it as a way of life." NEON, Z2's product, has been cloud-based since 2004.

One reason the cloud might be continuing its momentum from last year is that there is less sticker shock. SaaS products generally carry a monthly fee and are measured in dozens or hundreds of dollars, not thousands. And, prices might be falling further. "What we've seen is that because of increasing competition, there's going to be downward pressure on pricing," said Dave Spacone, SofTrek's president.

While a nonprofit must undergo cost-benefit analysis and take into account

costs over the lifetime of their cloud software, SaaS products by and large require much less of an up-front cash outlay. "If you're buying a sophisticated (on-premise) system, the outlay could be huge, not to mention the hardware and other infrastructure," Spacone said. He added that because cloud software is pay-as-you-go, it allows nonprofits to spread the cost over time, which can be very attractive to some organizations that might not have the resources to spend \$15,000 all at once.

Updating the software is also much easier with cloud solutions. Eprisa, a wholly cloud-based product made by Saturn in Cheverly, Md., gets updated

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every two weeks. Clients don't have to worry about using older versions. It saves money because vendors don't have to support legacy versions. "It's a big advantage over an (on-premise) solution," said John Yost, a consultant for Saturn. "If you're a software company and you release a new version, you've got to support that version and all previous versions your customers are using."

Saturn serves nonprofits that have

100,000 transactions or more a month, according to Yost. It found its business being gobbled up by other companies offering cloud solutions. "We decided that we were going to make a quantum leap forward, betting the company that SaaS is the way to go," said Yost. Eprisa has been on the cloud since 2006.

"Folks are getting educated," said Pope. "As people use more cloud-based systems in everyday life, as they get more exposure, there's a little less of the

worry there. Folks need to shift their mental model to this new way of accessing software. They're right to be wary but with more exposure, people are getting more comfortable with the idea of the cloud."

Although on-premise software will still be the best option for some organizations, vendors say that the marketplace as a whole is moving to the cloud. "Even though applications work as on-premise or are delivered via cloud, our

focus is on cloud service," said Girardi. SoftTrek still sells and supports an on-premise version of ClearView, but it no longer advertises its on-premise product and is nudging new customers to its SaaS version.

That's not to say that security is no longer something to worry about. It is an issue, especially with the rise of bring-your-own-device (BYOD) policies for gift officers. With BYOD, development officers are responsible for providing their own smartphones or tablets. Mobile devices have allowed many nonprofit employees to do business while on the road or in satellite offices using easy-to-carry devices. This convenience can improve efficiency enormously, but it gives development directors a new worry: what might happen if the employees lose their phones or tablets while they are on the road. Software developers share these concerns.

"We think having data secure is about protecting constituents," i.e. donors, said Noone. "We take that very seriously. Anybody in this business has security measures at the utmost recent technology to keep that (data) secure."

Noone believes that BYOD policies don't truly affect security. He said it's the same whether a gift officer is using a personal device or the organization's device. "That sounds more like permissions than security," he said. "It involves protections that any system should have in place. You shouldn't have something without a login or password. Anyone I know has some kind of code to get in."

Joseph Scarano, CEO of Araize, in Cary, N.C., said data files are housed in servers provided by Rackspace, which is SOC-1 (Service Organization Controls, formerly SAS-70) compliant. "Credit card and other critical data are processed from PCI (Payment Card Industry) compliant applications. The security and data backup procedures in place are far more extensive than what can be implemented in most nonprofit organizations," he said.

Even as vendors take steps to enhance product security, an organization must also take steps to protect its constituents' information. "Protecting data in the cloud starts with protecting it within their organization," said Scarano. "That starts with an organization's internal controls and the policies it creates. If you don't have the proper foundation for data security within your organization, you will never protect data adequately in the cloud."

Scarano's advice to nonprofit managers regarding information protection: Make sure you have policies that define data classification categories and data handling requirements.

SoftTrek takes an approach to security different from many others. Security happens at the database level, rather than the application level, meaning security policies and privileges are stored

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in the database. As long as security was built into the application level, said Spacone, “if you go at that data with another application such as a reporting tool or analytics tool, you’re circumventing the security.” When security is baked into the database itself, “no matter how you go at that data, that security cannot be avoided,” he said.

Security might be an abiding concern for any fundraiser, but it is not the only one. Adaptability and integration become more important as more organizations and providers of donor management products make use of the cloud and ever more sophisticated technology to improve performance.

“The cloud is real. The cloud is secure and it’s not going anywhere,” said Leigh Kessler, vice president for branding and communications for BIS Global in McLean, Va. “SaaS adds great flexibility and scalability. Companies that had quick growth are now re-evaluating, figuring out if they can be doing things better. They’ve accepted the technology, and now they’re thinking, what is the best strategy? The best strategy is integration.”

Mark Connors, vice president of Amergent in Peabody, Mass., said that his company has partnered with BSD Tools, part of BSD Digital, a consulting and technology firm, to provide a comprehensive suite of integrated e-marketing tools with Amergent’s Portfolio donor management system, a Web-based multi-user system.

Araize’s recently released FastFund Online supports accounting, donor, member, constituent management payroll and Web into a single integrated solution.

Scarano said that Araize also offers FastFund Accounting, which meets requirements for generating FASB-117 (Financial Accounting Standards Board) compliant reports.

Araize’s system is built around a single entity record so that donations, expenses, billing and constituent relations use the same information for every transaction and activity, and it appears such an



Eric Reese (right), an IMB missionary in Rio de Janeiro, Brazil, visits the home of his friend Dona Lica (left) and her son David.

approach is the trend of the future.

“The whole thing is about being adaptable,” said Todd Hinton, executive vice president of Bernard Data Solutions in Westminster, Colo. “Down the road, adaptability is going to be even more critical. People worked for so long with limitations with platforms, and they are looking to get access to real-time data.”

To that end, Hinton said Bernard is releasing Bernard Connect, an application programming interface (API) that will allow a multitude of applications for clients on the Bernard database. He said that the new development arose both from his company’s search for innovation and from customer demands.

“I just see the whole connectivity thing becoming more critical, about becoming more accessible to our users,” Hinton added. “But the point of the (Bernard Connect) platform is adaptability. One of the new big features our clients are excited about is the ability to attach docu-

ments to appeals or campaigns. For example, with direct mail, they might want to attach spreadsheets. That allows them to see five years down the road what they did with a campaign.”

Integration was a theme in this year’s report, with many vendors reporting that they’ve added the ability for their programs to “talk” to others, whether it’s accounting software, social media, or email blast programs.

“What the API is trying to do is bring clients into one database, one platform,” Hinton said. “That way we’re giving an interface to allow all of those systems to talk in the Bernard database.”

Synchronization with other programs, said Pope, allows donor management systems “to track not just donors but what events folks come to, etc. A lot of vendors are wising up to that and trying to make systems where integration can happen.” ClearView now has integration capabilities with wealth screen-

ing and email deployment applications.

Other vendors have included integration as well. Mission Research, maker of GiftWorks, has integrated its programs with MailChimp, as well as made GiftWorks Events accessible from GiftWorks. DonorPerfect allows users to post to and pull in data from social media. And Exceed!, like ClearView, is now synched with Constant Contact.

“We do think that integration is a critical piece of any good product or application,” said Dan Gillett, CEO of Kimbia in Austin, Texas. “In today’s marketplace, everybody has multiple products (from different vendors).” Modules for Accelerate, Kimbia’s product, allows information to get pushed out to credit card processors, CRMs and the email marketing program Eloqua.

But integration with other programs isn’t always the way to go for some software developers. Steven Shattuck, vice president of marketing for the Indianapolis, Ind.-based company Bloomerang, said the software is concentrated on doing a few things really well, instead of being “mediocre at 20 or 30 things,” he said.

Bloomerang, a newcomer to the donor management software report, was incorporated in 2012. “We looked at the marketplace and consolidation was the norm a few years ago,” said Shattuck. “Now you’re seeing very distinct individual products that do one or two things. We’re good at donor retention, donor management, and that’s all we want to do.”

Though integration might be the latest and greatest, Noone said that worrying about what programs are talking to what other programs should take a back seat to training and implementation for nonprofits.

“Too many times people go after the shiny ball,” he said. “Nonprofits need to ask themselves what’s more important to them in implementing their mission and raising more money. A lot of organizations think they can just purchase a solution, but it’s really an extension or a tool. You need them to get the job done more efficiently.” *NPT*



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