Fundraising Systems Conversion – A Primer

Congratulations on your decision to upgrade your fund raising software. You probably can't wait to begin using all the powerful tools and reports that will make your job easier and more productive. The only thing standing in the way now is transferring all of your donor history into the new system. You've no doubt received a proposal from the new system's vendor to do the transfer and were astonished at the price tag (unless you've previously been through a "Data Conversion"). Shouldn't there be a lower cost alternative?

Contrary to popular belief, in most instances it doesn't take a large corporation to accomplish a data conversion and the team doesn't have to be in your back yard. A single experienced individual can frequently perform the task in less than a month, using the Internet, a phone, fax and Fedex. And, unless your current system is extremely complex, billable time for the project typically ranges from 30 to 50 hours. There exists a small group of independent consultants that specialize in data conversions, often at a fraction of the cost that you were quoted and usually able to perform the conversion in a shorter time frame. So, how do you find them and how can you be sure they're capable of completing the project to your satisfaction?

Since most independent consultants do not advertise (the idea being, lower overhead means lower rates) they tend to rely on word-of-mouth referrals. Ask your colleagues in other non-profit organizations if they've had experience with a consultant. Ask at user group meetings. Ask at professional association meetings. Ask at seminars. Another potential source is a web site called Tech Soup (go to www.techsoup.com on the internet, click on "Find Services", type "conversion" in the keywords box and click "Search").

Let's say you've found one or more consultants that you think you may be comfortable with. Here are some tips for conducting the all-important interviews:

- Above all else, ask for references that include organizations in a similar industry segment (outreach, animal protection, historical, arts, etc.) as yours and of approximately the same size. Three or four should suffice. And check the references. Even if a reference is several years old, there's bound to be someone there who remembers the consultant and would gladly share their experiences with you.
- Next, ask about a guarantee. If a consultant isn't willing to provide a written guarantee, he/she is probably not your best choice.
- Ask how they arrived at their cost estimate. Did they request a copy of your data before attempting to estimate the cost? Will they provide a written estimate?
- Find out when they would start the project and how busy they currently are. Even though the billable hours estimate may be in the 30-50 hour range, a conversion typically takes over a month.
- During the interview, notice if they "talk down" to you, frequently using acronyms not familiar to you. This may foretell misunderstandings later on during the project. It is imperative that you speak the same language and that they clearly understand what you are trying to accomplish.
- Are they willing to accommodate special circumstances that may exist in your current system? For example, say your system doesn't have a code to indicate a donor is deceased, and your data entry staff has entered the word "DECEASED" in the address field…how will that be handled?
- Ask them if they will export the data from your system or will they expect you to do that. Also ask if they will import the converted data into the new system. Depending on the "before" and "after" systems involved, these can be formidable tasks.
- Will they provide test runs? It is unusual to get it right the first time. Depending upon the complexity your current system, it is not unheard of to require more than one test run. Until you see how your data is represented in the new system, it may be difficult to convey your wishes.
- Will they assist in the validation process? When the test run is delivered, there needs to be a way to ensure the conversion has transferred the data correctly. This is a time-consuming step, but one that is absolutely necessary. A good consultant will have experience dealing with this issue

and be able to recommend procedures to minimize your efforts. More importantly, this step has to be repeated after the "live" conversion.

- Are there extra costs for minor data cleanup such as:
  - Removing "DECEASED" from the address field
  - Checking for invalid dates
  - Checking for invalid phone numbers
  - Checking for invalid codes
  - Proper-casing name and address fields. If you have utilized a National Change of Address (NCOA) service, you know that such services standardize abbreviations and uppercase the entire resulting address. Many organizations feel that appears to be rather impersonal.
  - Checking for non-numeric fields that should be numeric
  - Code consolidation or expansion (e.g. shortcomings in older systems may have required that a new fund code be established for each year. Newer systems allow one fund to be established while the date of a gift determines the year…hence many fund codes may be "consolidated" into one fund code). Conversely, a single code in your present system may be represented by two or more codes in the new system…hence "expansion" of the code.
- Does he/she have trusted partners or provide any additional services such as:
  - NCOA
  - Donor demographics (age, income, length of residence, etc.)
  - Wealth rating
  - Phone verification or append
  - Email append

When your consultant has passed the above qualifiers, you're ready to move to the next step. If your organization has special requirements such as consolidating or eliminating gift sources, funds or other codes, proper-casing of address data or minor data cleansing, ask up front if that's included in the services. If not, you may be faced with the formidable task of handling those problems manually.

Finally, don't be afraid of asking for a fixed-price, it's really quite common. In fact, a competent consultant should be able to guarantee the quality of his/her work <u>and</u> the associated costs.

By now, you've got a good feeling that this consultant can handle the project. If the price is right, ask for a contract, make yourself (and others who will be using the system) available to answer questions that may arise. Be confident that your analysis will pay off in an orderly transition to your new software system and will minimize any anxiety, which would be caused by a hasty decision.

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