

# Key software solutions for the VCS

## What's available, and how it can be used to improve operational performance

Introduction, Overview and Background



## Introduction

This report was commissioned by the ICT Hub and CITA have developed these resources in partnership with the VCS. It is aimed at informing the small to medium sized Voluntary and Community Organisation (VCO) about which software is available. It will address issues such as the availability, likely cost, usability and ease of set up. This report addresses the following five areas of software;

- 1) Fundraising Products
- 2) Financial Management Products
- 3) Contact Management Systems & Customer Relationship Management
- 4) Content Managed Websites & Online Transactions
- 5) Products You Need But Don't Have

For the purposes of this report we consider small VCOs to have a turnover of £100,000 or less and/or to have less than 6 members of staff (or full time equivalent). Medium sized VCOs have a turnover of up to £1 million and up to 25 staff. Our findings are aimed very much at the lower end of the scale. We assume that 1% of turnover for an IT budget but know from our own experience that it is often far less.

There is a significant level of cross over between the areas of software that were investigated. Many of the higher end CRM systems offer modules that include fundraising and finance e.g. Sage and Prophet.

The findings are not exhaustive and are not intended as endorsements. The lists are intended to be starting

points for an organisation to look at what potential software is available, they could fall out of date within days of the publication of these findings.

We have rated each of the software items for; cost, ease of use and set up.

Each section of the report contains two case studies relating to software within the study.

## Overview

The “Fundraising Products” section of the report looks at fundraising software and covers the following categories; Donor management and tracking, Identifying funding and writing better applications. Commonly used websites such as Grantfinder and Funderfinder already assist the VCS in the fundraising process. This section looks at other systems, sites and portals that are available to help you identify potential funders, other sources of funding, manage donations and frame funding bids.

The section on “Financial Management Products” speaks for itself.

Many VCOs make use of Sage or Quickbooks. Small VCOs could simply use a spreadsheet from a template or a more sophisticated menu form driven spreadsheet.

The “Contact Management and Customer Relationship Management” section looks at which systems might suit the small to medium VCO.

Customer Relationship Management (CRM) software provide advanced

databases systems that help to organise, track, record and report on interactions with clients and customers.

There is a scale for “databases” from simple lists, through Contact Management (CM), to full CRM and from there to full Management Information Systems (MIS). These are beyond the reach of the average VCO and hence are not included in the findings.

CM systems are half way houses between an address book (e.g. Outlook) and CRM systems and share some of the features

CRM systems also come in different “flavours”, leaning towards donor relationship management (DRM – e.g. Donorflex), case recording, finance or sales.

The “Content Managed Websites and Online Transaction” section looks at what is available at low cost to help the VCS develop and maintain a web presence.

Many VCOs have a website, typically it is relatively small but not easy to update information. This element of the research looks at what is available at low cost to the sector.

Content Management systems (CMS) are potential ways to avoid using complex packages such as Dreamweaver or Front Page to manage and update a website and reduce the reliance on a few technically minded individuals to support your web presence.

There are many CM systems available, some are “off the peg”, others are modified or tailored from

existing products some are fully bespoke. Your web designer will have an individual preference but all should allow easy and on screen modification of website content.

Getting donations direct from your website is becoming popular within the VCS. Using services such as PayPal or Worldpay, secure online transactions can be set up to accept payments. Some systems can be complex if you want direct control, otherwise third party payment systems, such as these, offer convenience and security.

The “Software You Need But Don’t Have” section could be a vast report by itself, we have concentrated on useful tools and software that can help your organisation run. Within the report we have identified utilities to help back up e-mails, provide automatic and secure off site data backup, remote access, et al....

## **Background**

Commercially available software can either partially meet or go far beyond the basic needs – the key to identifying the requirements of any software is the balance between the aspiration of what you need or want it to do and the budget that you have. This is the hardest part of the process.

There are solutions to meet all requirements – remembering that including more features and functions scale will normally mean moving up the budgetary scale.

Bespoke systems should do exactly what you want but come at a premium and carry the risk of extended development time.

Any “off the peg” solution will inevitably lead to compromises.

A half way house is utilising “tailored” solutions that are modified from existing products or solutions. For example website systems such as Xoops, Drupal and Joomla can be a more cost effective way of getting a manageable web site. Tailored solutions can be within reach, however set up, development, training and on costs all need to be met. Care must be taken to source a reliable and sector friendly developer that is not going to be a long term financial burden.

DIY or home made solutions will do what you want them to do, but tend to be very dependant on one member of staff or volunteer and are often a bit “clunky”. In most cases VCOs lack the internal expertise to make an Access database or Excel system fool proof, user-friendly, reliable and most importantly scalable. Internally developed systems typically lack the “polish” of a professional product but do the job and require regular “tweaks” to keep going.

A high level of planning needs to be undertaken when designing and developing any new IT system. Many new systems and procedures will need to be developed in tandem with software developments.

Open Source offers the carrot of “free” but still requires development and support, these are normally not free services.

Little known solutions can also be attractive but questions need to be asked regarding longer term

compatibility (will it work with new Microsoft Operating Systems?) and technical support. Databases can be prone to changes in Microsoft operating systems and can be required to work in the longer term (3-5 years).

There are many providers offering services and solutions from under £100 to many thousands. By and large we have found that you “pay for what you get” in terms of IT, hence do not expect a lot of functions and features for a little outlay.

Decide on the critical requirements of the system and be prepared to compromise over the extras. Be prepared to halt the development of a new system that doesn’t do all that you want – it may be better to wait until either funding can be found or the technology changes to make the job easier and cheaper.

It should also be noted that any on costs (training, support, hosting, maintenance, rentals, etc) need to be considered and budgeted for as a part of any IT development. Remember to ask if training is included in the package price – it is common that it is not and can drive up the package cost considerably. be useless.

Training must planned as an integral part of any development process from the very start – be it “in house”, part of the package or training via an external agency.