

# NSCS CRM Needs Evaluation

## Current Situation and Issues

*We have a holistic database of over 24,000 constituents. (“Constituent” is a general term applying to current and past members, patrons, ticket purchasers, mailing recipients, community contacts, partners.) However, the existing database is maintained on a member’s personal computer using software that is no longer supported, and there is currently no mechanized backup routine. One person (the “Computer Services Coordinator”) must do all of the data inputting, updating, querying, and reporting. The current Computer Services Coordinator wants to relinquish these responsibilities.*

## Goal

*We need a way for multiple coordinators to be able to manage the content our organization’s database while preserving the holistic aspects of the data (data about a single constituent stored once, regardless of multiple relationships with the NSCS). This will allow our organization to maintain and use the data more efficiently. Since NSCS does not operate from a business office, we want coordinators to be able to access the database remotely, via the internet, using the coordinator’s choice of browser. We also want a mechanized backup procedure to ensure that we can recover data in case of malicious or accidental loss.*

## Evaluation

Key stakeholders interview results:

- Webmaster (Jim Miller to identify applicable technology best practices)
- Membership Coordinator (current and past: Anthony Green, Emily Rivera)
- Computer Services Coordinator (Anthony Green to verify completeness of current system documentation and that new system requirements cover what is currently done)
- Patrons Coordinator (Steve Warner sends solicitation letters, thank you/tax letters)
- General Manager (Karen Rigotti currently sends all-member emails, needs addressees for miscellaneous publicity like post cards)
- Mailings Coordinator (Kent Fuller)
- Brochure Coordinator (Bob Zahniser needs file of addressees for mailing service)
- Ticket Coordinators (Phoebe Segal, Sanna Longden)
- Program Ad Coordinator (Jack Hedquist keeps track of which member solicited which ads)
- Nominating Committee (John Summerhays needs to know current member skills, willingness to volunteer for elected/appointed positions)
- VP Operations (Julie McDowell currently manages choir concert seating)
- Treasurer (John Darrow currently processes data for donations, dues, vendor invoices, foundation grants)
- VP Marketing (yet to be named; may want to expand into marketing by email)

## NSCS CRM Needs Evaluation

- Board Sponsor (Steve LaTour to represent other potential requirements/considerations)

[Help stakeholders identify the constituents they interact with on a routine basis and to articulate key challenges in managing constituent information (collecting, updating, sharing and using contact information).]

**Identify specific inefficiencies** that could be addressed by a comprehensive Constituent Relationship Management solution.

- Dependency on old technology (pc, os, dbms, printer, pin-feed paper)

**Enumerate the resulting lost productivity.** For example:

- **Dependency on central maintenance.** *The Computer Services Coordinator (one person) is responsible for all database functions; we cannot spread the maintenance/query work among coordinators who have responsibility for the functions that create/use the data, and so are dependent on one person's availability to perform all database-related tasks.*
- **Dependency on external programmer.** *Making database changes or complex changes to queries requires the expertise of the Computer Services Coordinator's son, who is not a member.*
- **Data vulnerability.** *Inability to make reliable backups of all data and protect it against malicious or accidental loss.*

**Benefits** of investing in a holistic CRM solution.

- **Accessible to NSCS Board Members, Coordinators, or other NSCS membership** via the internet (with specific granular permissions from entry level to super-users)
- **Holistic record for each constituent** showing all their contact information and interactions with our organization.
- **Dynamic creation of constituent groups** allowing us to create groups of constituents based on criteria such as 'all donors of over \$100' or 'all donors whose gifts have amounted to major gifts this year'
- **Dynamic creation of top donor and other reports**
- **Constituents' self-service creation and management** of their contact/contribution/subscription/activity records

**Implementation costs** Include a budget for implementation that contemplates:

- discovery and project management
- data clean up, consolidation and migration
- system configuration
- post implementation training and documentation

## NSCS CRM Needs Evaluation

**Maintenance costs** Include a budget for ongoing maintenance that contemplates:

- pro-active server maintenance
- incremental data backups
- operating system and software upgrades
- ongoing training