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In Search of Wildly Easy Member Management

10 essentials to consider when choosing technology to manage a not-for-profit organization

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Keeping a not-for-profit organization running requires effort. Small tasks add up. Next thing you know, you're working 'til 9pm. Can you be saved by technology?

It's obvious that technology can provide solutions that save time and money, enabling you to do more for less. Which is exactly what your board of directors is always asking you to do.

But that presents you with a new problem — choosing a technology that meets your needs and fits your budget.

A bewildering variety of choices faces you when you choose technology today. At the low-price end, you can use Hotmail, Yahoo mail and MSN instant messaging for communications and PayPal for membership and conference payments. At the other end, you can hire consultants to design a custom integrated application that will take care of all your needs.

In the mid-range, there are all kinds of options. You can buy boxed software that will take care of your mailing lists, conference registration, payments, etc., etc., etc. You can outsource the whole job to a third party that specializes in providing not-for-profits with solutions. You can look for custom web-based solutions designed to meet the needs of your kind of not-for-profit organization.

Here are ten things to keep in mind as you make choices.

1) How much additional day-to-day work will the technology create for you?

With some technology options, you end up having at least three or four pieces of software to run your not-for-profit. Your public website is one. Your member database is another. The list goes on: an event registration system, an e-mailer to send reminders, a secure member-only website . . . .

You can invest considerable time in feeding the little monsters —constantly transferring membership names, email addresses and other details from one program to another. The last thing you look at as you leave the office at night, with a little twinge of guilt, is likely to be the stack of faxes and sticky notes with information waiting to be processed.

Integrated applications are designed to eliminate many of these problems. A properly designed integrated application can handle many vital not-for-profit organization tasks — e-mail blasts, event registration, your public and private website, sponsorships and membership. You only need to provide one list of members and a well-designed application will manage, update and back it up for you.

2) How easy will it really be to learn to use your member management system effectively?

Complex software can hamper your ability to get work accomplished. Even if the application has all the features you need, if you can't comprehend them quickly, you may never end up using them to their full capacity.

A lot of time is wasted by users learning how to use an application, because the developers didn't take the time to make it simple to use. Has this happened to you? You're working away, an hour passes… *and nothing's been accomplished!*

When you are evaluating a technology you are considering for your not-for-profit, look for hints that the product might be difficult to use especially training courses that you are obliged to take before you get started.

There are well-designed integrated applications that avoid complexity. They will: automatically notify your members by email when you post new events; track membership renewals; let you post PDF documents or presentations on your website for exclusive access by members – without requiring a few days wait until you can get hold of your IT pro to do it for you; and they will let you quickly find a member in your contact database.

3) How quick will it be to get started?

Some technology solutions are difficult to implement.

We're all familiar with installing our own packaged software. It comes complete with manuals, CDs, installation manuals — everything shrink-wrapped for you except for the patience and extra time you really need.

Here's what typically happens…

First, you drive to the store and spend a half-hour with a salesman as he explains to you all your options. You drive back to your office. You unwrap the box, read the "quick start" manual, and install the CD.

If this goes smoothly it may only take five minutes. If you're not technically inclined, let's give it 10. If something goes wrong… let's not even think about that.

Then you have to upload your own data into each of the applications — that can be easy if the applications have well-designed importing systems, but a time-consuming task if you have to resort to manual operations to get your membership in.

Other technologies offer the appealing feature: NO INSTALLATION REQUIRED. You open your browser, log in, upload your membership list and get started. These are applications that host the software online for you — it is already loaded on their servers.

4) Will restrictions imposed by your technology create bottlenecks or limit where you can work from?

Many not-for-profits have significant peaks and valleys in their workloads. At conference or annual meeting time or when you are responding to an issue, the workload increases dramatically. Often, you end up with volunteers or temp workers helping you out. The number of people needing access to your membership management system can increase dramatically.

Some solutions, typically software in a box, come with ONE license key. Which means only ONE computer can run your association from ONE physical location. Not exactly ideal.

Even if you pay for extra licenses, you'll then have to network all of your computers together. That may involve more wires, hardware and/or encryption codes.

Other solutions, often web-based, can solve this problem. There are no restrictions on the number of users or their locations. Anyone in your organization can be typing away immediately. All they need is a computer with an Internet connection. Since most people already have this setup, all the "networking" is already done.

You can run your association from home, the office, or a laptop at the coffee shop.

5) Is the software easily updateable and readily scalable?

Software changes as improvements are made and the programs need updates; your not-for-profit changes and you need new features and functionality in your software.

All software requires updates. There are always improvements to be made, glitches to fix. No one gets it 100% right the first time.

Updating software can be a time-consuming annoyance, one you may want to avoid. Off-the-shelf software usually scans the Internet, looking for updates, each time you boot up. If it finds any, it now needs another minute to download (more if you are on dial up). Then on to step three, installation, another 30-90 seconds of your time. *Finally,* you can get to work (unless of course you have to reboot your computer to complete the installation).

Other solutions are updated continuously. With many web-based systems, the updating never interferes with your work. Instead, you'll suddenly find that the system just got a little smarter. A task that usually took five steps is done in three. An option you always wanted has suddenly materialized.

If your not-for-profit changes, you may have to add software to get new functionality. Evaluate your potential software purchase in light of new activities you see your organization becoming involved in. Will you have to buy new software and install it? Or is the software you buy scalable, allowing you to easily expand functionality within the integrated system, saving you work?

6) Have you considered total or lifetime costs when you evaluate technology solutions?

It's a fact of life that you keep on paying for software. You may buy "The Ultimate Membership Management Program 1.0" (doesn't exist) software package. This time next year they will release the 2007 version. If you want the added benefit, you'll have to pay again to upgrade. If you don't, the software provider will eventually stop supporting the version you are using.

In reality, you end up paying a yearly membership even though you think you "bought" the software outright.

Keep that in mind when you evaluate Web-based applications. With many of those, you know from the word go that your only investment is a yearly fee. You save on the initial investment in software, the time required for installation and the effort and money you will have to put into yearly upgrades.

It's a good idea to evaluate the cost of your technology investment over a five or 10-year period, then pro-rate it to a monthly cost to make an effective price comparison.

7) What about security?

Members entrust you with their personal information - names, addresses, and phone numbers… even credit card numbers. They have faith that you'll protect them from online hackers.

Here's the problem —custom-built websites that guarantee security are expensive.

Low-end solutions, the do-it-yourself websites often have security holes that even a 16-year old kid could crawl through.

Examine the security of the system you are considering.

Reputable website designers ensure the entire system goes through many rounds of rigorous testing. Nothing is launched until outside, neutral, professional compliance experts are satisfied — people who don't care about timelines but are being paid to find problems.

8) Will the kind of customer support you need and want be there for you?

Let's be honest…

With any system, there will be issues and questions.

With some software, frustration often starts when you are directed to a third-party support line. We've all spoken with a call agent who reads us a script — yet never solves our problem.

Other applications guarantee you will deal with a high-level professional who thoroughly understands the software and treats you not as an annoyance but as a customer who is providing feedback that will improve the overall performance of the program.

9) What about affordability?

Most groups work within a tight budget. Too often, they must rely on cheap software that doesn't meet all their needs. A not-for-profit organization would have to take out a small business loan to have proper software developed.

Web-based applications offer a way around this, at a price appealing to not-for-profits. One custom application is shared by thousands of small organizations, making it affordable. Everybody has separate accounts, of course, but they are logged onto the same system. A system they could never afford if purchased individually.

10) Would you buy a car without test-driving it?

As an executive of a not-for-profit organization, you may spend more time with your member management software than in your car.

Can you test-drive your software before you buy it?

Be wary of contracts you must sign before you can test a program. And a whole bunch of red flags should pop up if you must pay fees to be trained on how to use the application. If you need to be trained, it's a good sign you have a complex application waiting to consume your time.

Conclusion

Yes, you can be saved by technology. Nothing else is likely to save you.

The trick is to find a solution that works for you in your unique situation. If you have the budget to hire a consultant, you can probably find it.

If you must make the decision essentially by yourself, I hope the questions suggested above will help guide you to a solution that will actually reduce your workload and even give you a good return on your investment of time and money.

As technology develops, more kinds of solutions become available. At one time, you had no choice but to have custom technology. Then, in the pre-Internet days, a decade ago, you could buy your solution in a box. Today, advanced web-based solutions are available.

Whether you eventually decide to go custom, boxed software or web-based for your solution, I hope you go in with your eyes wide open to the features and benefits, advantages and disadvantages of the solution you choose.

About the author

Dmitry Buterin is President of Bonasource Inc., a custom web development services company based in Toronto, a creator of elegant, efficient online applications.

Buterin has worked with startups, non-profits and some of the word's biggest corporations and he knows how hard it is to get a Web project right, no matter what budget do you have.

His ambition is to free people from being "technology slaves" by approaching web projects from the users' point of view.

Bonasource Inc. is a member of Canadian Society of Association Executives (CSAE) and American Society of Association Executives (ASAE), professional organizations for people who manage many of the most progressive non-profit organizations and supply the sector with essential products and services.

About Wild Apricot

Wild Apricot is a new-generation (Web 2.0) web software that automates daily administrative routines for not-for-profit organizations. Wild Apricot handles website management, member database, donations, event registrations. You can access it from your home or office to update your Web Pages, organize meetings, keep tabs on registrations and donations, and manage your membership database.

Wild Apricot can empower you to:

- Instantly look up any member and membership history and renewal details.
- Grow your community faster - members can sign-up, pay dues and renew online.
- Save you time by allowing members to join, pay dues, donate, update contact details and register for events.
- Increase attendance at your events by automatically sending out notices and reminders.
- Save you time by handling event registrations and online payments for members and the public.
- Make it easy to contribute to your cause with online donation forms and email receipts.
- Create professional websites using templates; customize and update
- WebPages, events, member profiles and everything else seamlessly integrated into your site.

Wild Apricot is affordable, simple to set up, easy to use and will smoothly automate many processes for you.

What will you do with your new-found time?

To explore further, go to the Wild Apricot site at www.wildapricot.com , where you can try out the software for free.