



National Community Foundations Forum 2014

An Australian Community Philanthropy event

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Choosing grants and donor management software for Community Foundations

Daniel Muggeridge

PAINFUL, DULL & BORING

but just as critical as a trip to the dentist



How to get your donor
and grant-management
systems right

*Multiply the value of
what you do*



Daniel Muggeridge, Sept 2014

Strategic choices

On what does Community Foundation success depend?

- Strong governance
- Great people
- Excellent (appropriate) tools for the job



Strategic choices require effort

- Commit whole-team effort
- Engage good practice and well-worn path:
 - Document organisational requirements thoroughly
 - Request for Proposal process
- Number one reason projects fail: poorly defined requirements



Document your requirements

- **Why document requirements:**
 - Facilitate choice of best-fit vendor
 - Ensure selected vendor is implemented optimally
 - Excellent opportunity to review organisational process and priorities
 - Manage expectations (eg Board)
- **How to document:**
 - Do not write “solutions”
 - Include business processes (before and after)
 - Requirements should be: Simple, Necessary, Achievable, Prioritised, Traceable, Verifiable
 - Manage the Curse of Knowledge: What seems obvious to an insider will be unknown to an outsider
- **Hints:**
 - Aim for more detail rather than less
 - Always ask “why?”, “what if...” and “tell me about any frustrations with...”
 - Your requirements are not all high priority!

Vendor Request for Proposal

- **Why RFP?**
 - Widest possible net, without corresponding effort
 - Most accurate comparison across offerings
 - Best possible choice and best possible implementation
- **How to run RFP:**
 - Define and publish selection criteria
 - Publish requirements documentation
 - Short-list vendors on written responses
 - Vendors present demo of offerings
 - Possible further deep-dive inquiries
 - Check referees – solicited and unsolicited
 - Decision-time...
- *Note: Good process is a worthy servant and a terrible master*

Who decides?

- This is a *strategic decision*
- Must have Board buy-in and minuted approval
- Recommended by the CEO
- Based on broad input from the team
- Team's input based on selection criteria agreed up-front

Note: while strategic system choices must be joint governance and management decisions, keep in mind the whole team's engagement throughout the process



BRDs and RFPs: Hints and tips

- Start with high ideals, continue with pragmatism, and finish with resolve
- Expectation management is everything; this is likely to be a difficult journey, but a worthwhile one
- Use the cloud – or have *good reason not to*
- There is no single one-size-fits all answer; your organisation's unique focus should have a strong influence on the choice and implementation of systems

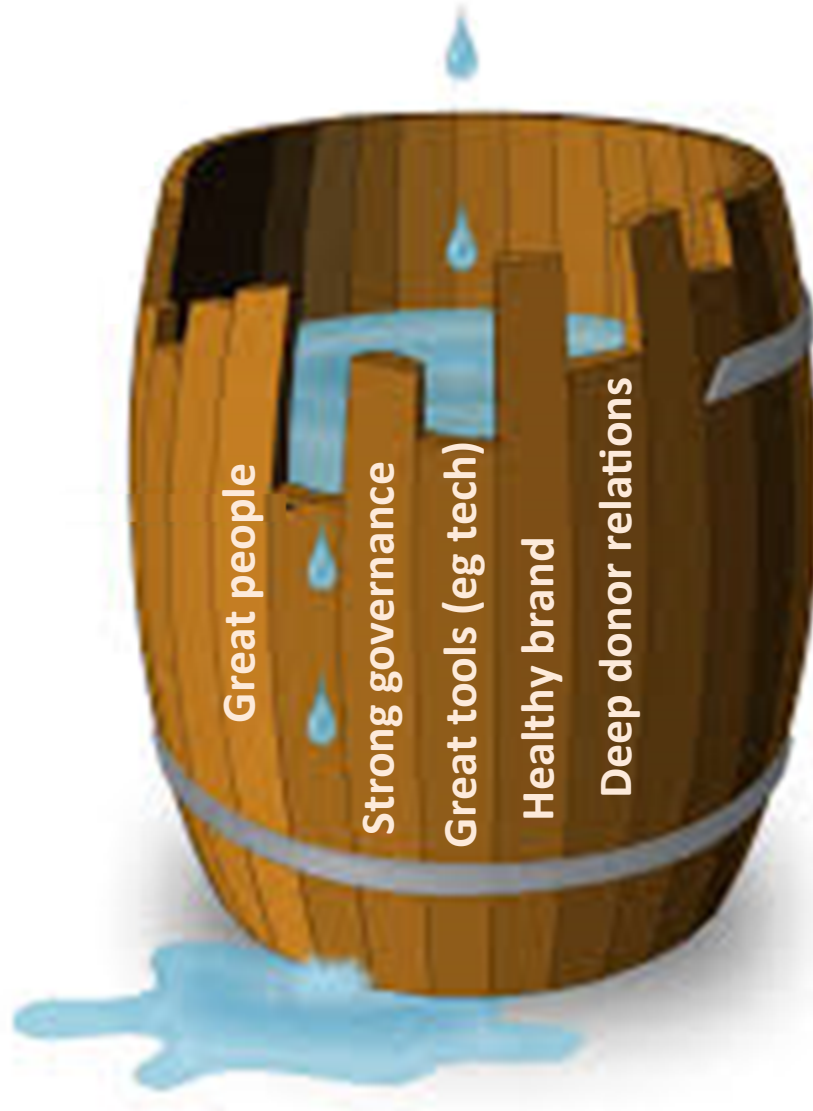


What next?

- Thorough requirements and tender processes are just the beginning; next:
 - assess implications on business process, staff training etc in *design*
 - manage stakeholder expectations and change journey *exceptionally*
 - manage the implementation effectively
 - budget time and effort for data migration
 - create and maintain a healthy vendor relationship

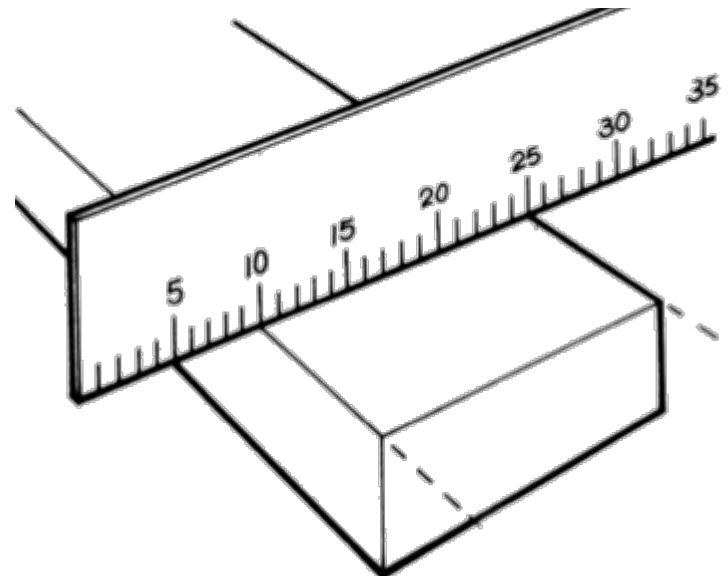


What's your minimum factor?



Not-quite final note

- It is *expensive* to short-circuit due process or attempt in-house without expert guidance and leadership
- Get help, if necessary, to sell the message that you need to invest in infrastructure



What if I'm too small?

- If its worth doing its worth doing right
- There's value in community – team with like-minded and similar organisations on process and solution



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