



In August 2021, the Social Venture Partners Boulder County (SVP) Technology Resource Team surveyed Boulder County nonprofits to gain a better understanding of the local technology landscape. Thirty-three individuals from twenty seven organizations responded to the survey. The key takeaways from the survey are that the majority of organizations use a CRM (constituent relationship management tool) and that whichever tool is used, it is considered critical for fundraising efforts.

Organizations use a variety of CRM tools, with the most predominant being Salesforce, Neon, DonorPerfect, and Blackbaud products. Tools for related functions such as online donations, forms and surveys, and grant, volunteer, and event management are even more varied with little overlap between responding organizations. Few organizations are using a text messaging application. Organizations are relatively satisfied with their CRM with the top reasons for dissatisfaction being complexity of use and lack of functionality or the need for add-ons to meet desired functionality.

Responding organizations are largely relying on vendor customer support or volunteers when issues or questions arise with their CRM and the majority of organizations have 5 or fewer staff members who are highly skilled at using the system. Organizational priorities when selecting a CRM are functionality and price and few organizations prioritize staff experience/knowledge.

From the responses, the SVP Tech Team has drawn the following conclusions:

- CRMs are critical for Boulder County nonprofit organizations to achieve their fundraising goals.
- Organizations are lacking the training and support needed to make the most of their existing CRM.
- Organizations are using a variety of technology tools to meet fundraising and related functions with little to no integration with their CRM.

Based on these findings, the SVP Tech Team offers support to Boulder County organizations by:

- Connecting staff members with other organizations who use the same tool(s) for peer learning opportunities;
- Assisting organizations with finding the support they need, by connecting them with skilled professionals who focus on working with nonprofit organizations; and,
- Supporting organizations with technology audit services to inform strategic technology decisions.
- To contact Social Venture Partners Boulder County to learn about the technology services they provide, please go to the “Contact Us” page on the Social Venture Partners Boulder County website by [clicking here](#).


Contact:

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The background features a large, faint dashed circle. Various solid-colored circles in shades of teal, green, yellow, orange, and pink are scattered around the page. Some circles are solid, while others are dashed outlines. A large teal ring is in the top left, and a large yellow ring is in the bottom right.

Social Venture Partners Boulder County Technology Survey 2021

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A large orange circle is the central focus of the graphic. Surrounding it are several other circles: a large cyan circle in the top left, a smaller cyan circle below it, a small pink circle above the orange circle, a yellow circle with a dashed border and a white center overlapping the top right of the orange circle, a lime green circle overlapping the bottom left of the orange circle, and a small green circle with a white center at the bottom left. A dashed cyan circle is also visible in the top left corner.

SVP helps
strengthen Boulder
County nonprofits
while evolving
individual
engagement in
philanthropy.

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A decorative graphic on the left side of the slide features a large orange circle in the center. Surrounding it are several smaller circles in various colors: a large cyan circle at the top left, a medium cyan circle below it, a small pink circle above the orange circle, a yellow circle with a dashed border and a white center overlapping the top right of the orange circle, a lime green circle overlapping the bottom left of the orange circle, and a small green circle with a white center at the bottom left. A dashed white line is also visible in the top left corner.

Our Vision & Mission

Vision

A more vibrant and thriving Boulder County community for *all*.

Mission

To harness the collective power of nonprofits and philanthropic changemakers to accelerate community impact.

Nonprofit Programs

Catapult

**Resource
Teams**

**Invested
Leaders**

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Who is the Tech Resource Team and Do they Do?

SVP's Technology Resource Team provides technology assessment and roadmap planning services to ensure that your organization has the right technology tools to meet your programmatic and operational goals.

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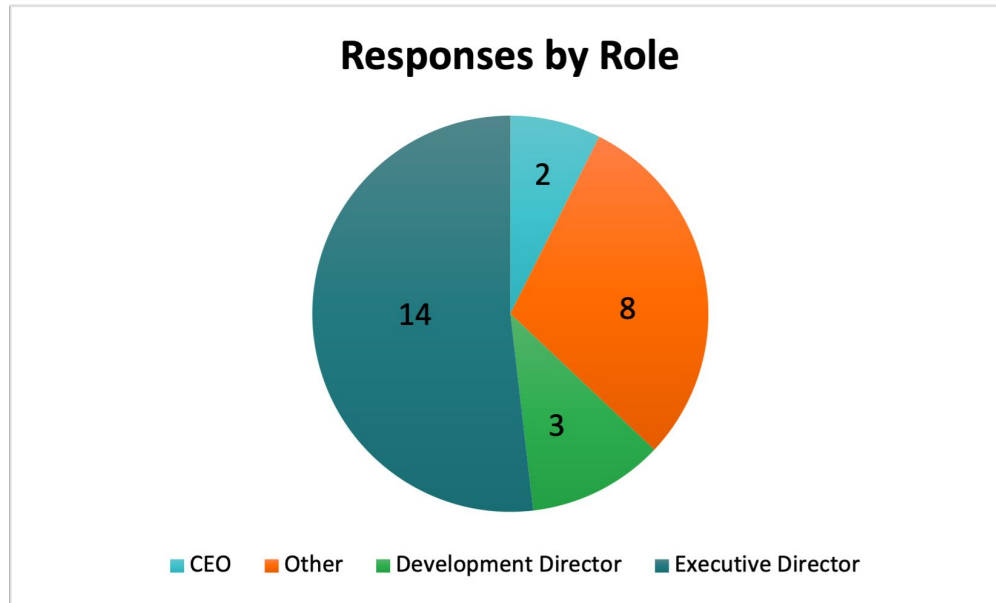


About the Technology Survey

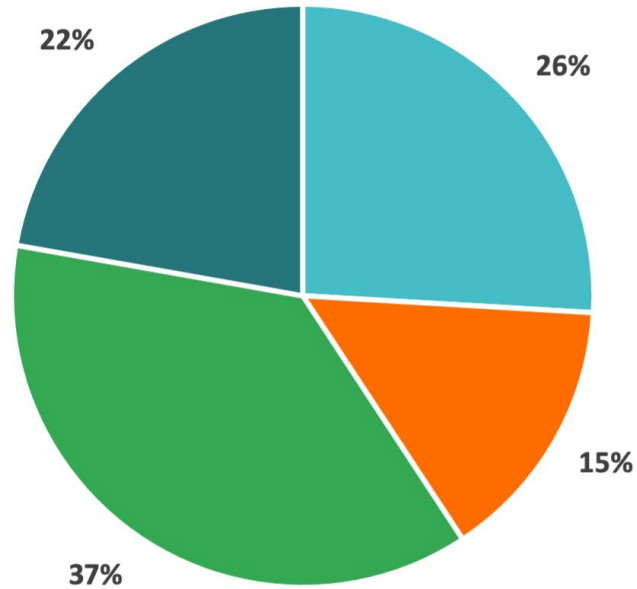
The SVP Tech Resource team developed this survey to identify themes and needs in technology use by Boulder County nonprofit organizations so that we can provide connection and services based on findings.

Tech Survey Responses

33 responses from **27 organizations**

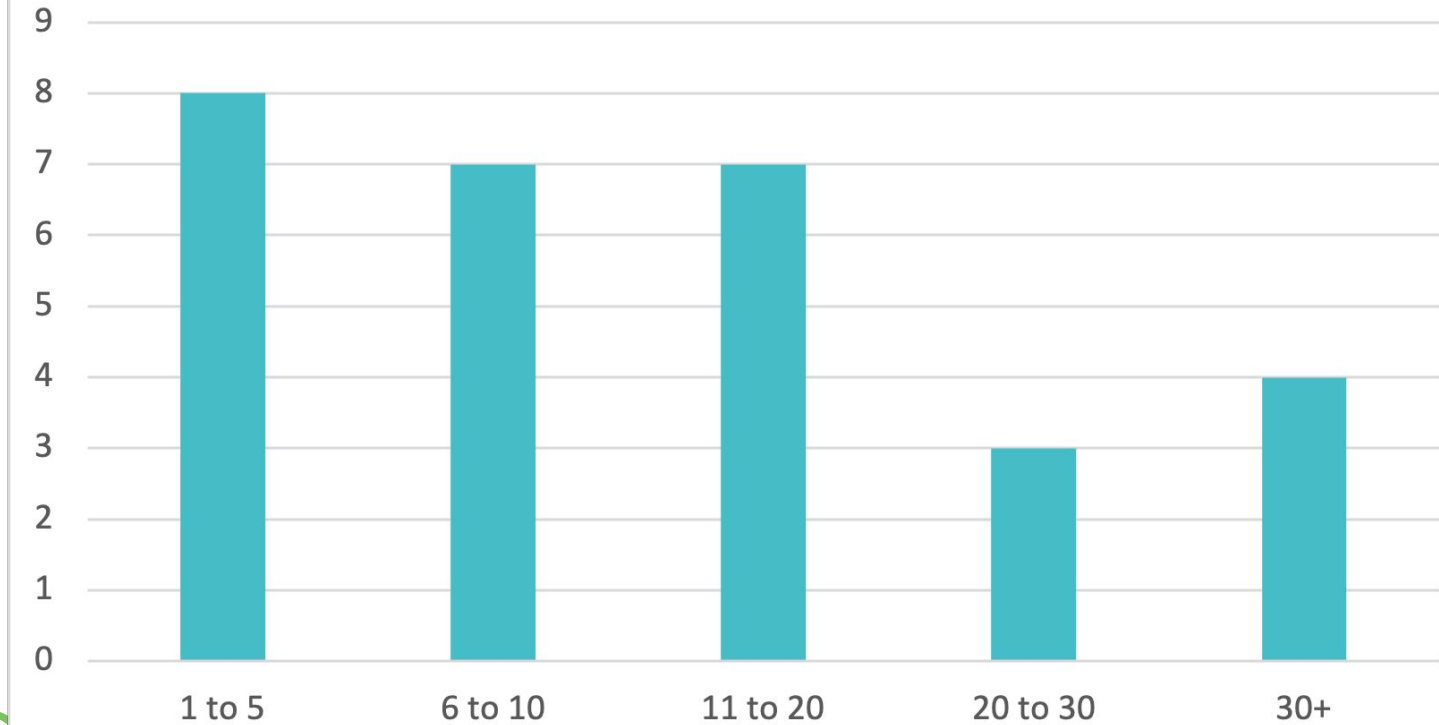


Responses by Organization Size/Budget



■ Less than \$500K ■ \$500K - \$1 million ■ \$1 million - \$2 million ■ Over \$2 million

Responses by Staff Size

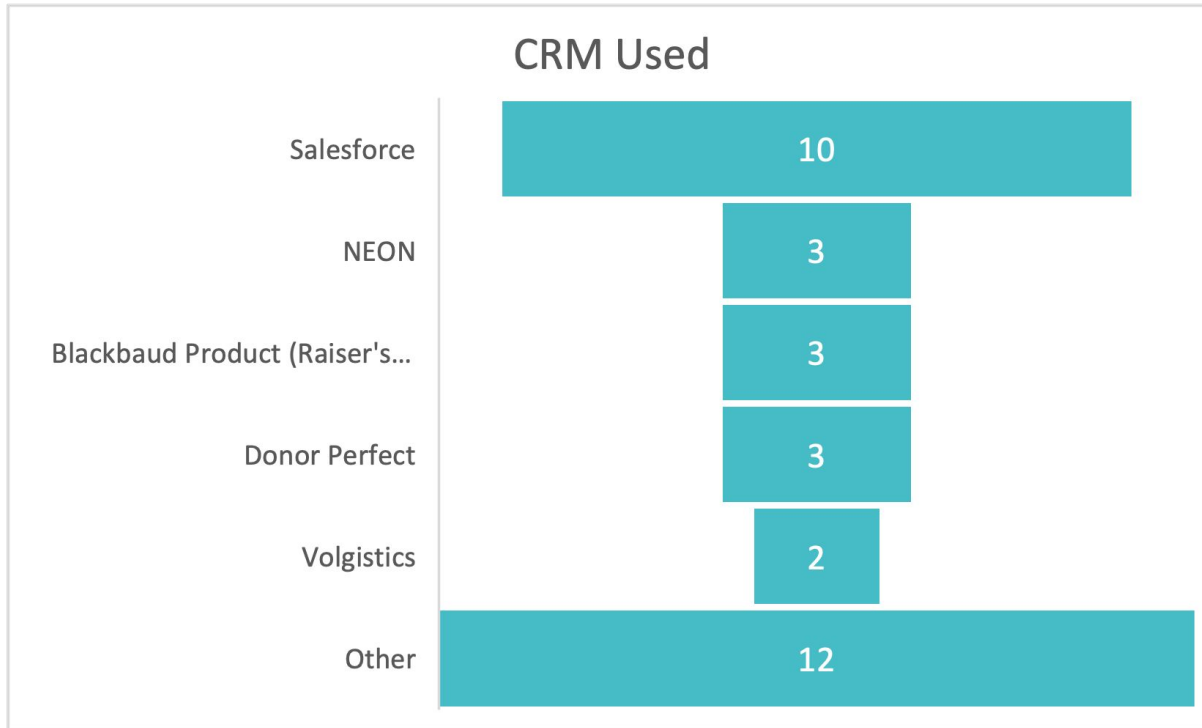


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93%

of responding organizations
currently use a CRM
(Constituent Relationship
Management tool)

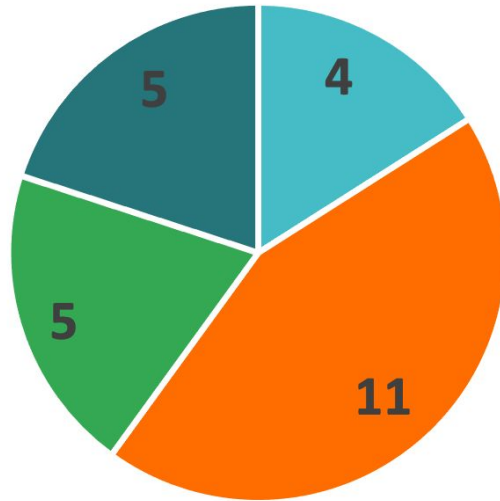
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*Some organizations listed several tools/systems used

*Others - only one response for each of the following - CampMinder, Bloomerang, Boulder County Connect, eTapestry, DonorView, Exceed Beyond, Giftworks, MyHeadStart, Kindful, ServTracker, Digital Galaxy, PatronManager

How long have you used this CRM?

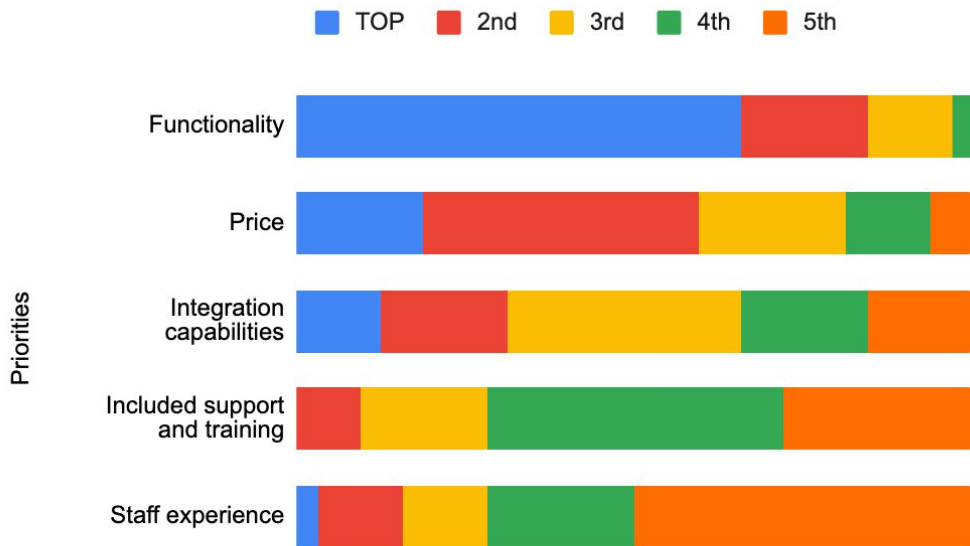


■ Less than 1 year ■ 1-3 years ■ 3-5 years ■ 5+ years

Key Insight:

Non-profits choose software on the basis of **functionality and price**

Priorities when choosing a CRM database



... and **not for training and staff support**

How Did We Get Here?

(Why did you choose this software)

“I didn't. I inherited it.” (Neon)

“We've had it from before I started.” (GiftWorks)

“Our national organization chose it and allows us to use it for free.” (Salesforce)

“Best for the price, required by funders.” (DonorPerfect)

“Easy to customize, affordable, could be expanded to volunteers and clients.” (Neon)

“It was a fundraising software that fit into our budget and "integrated" with VolunteerHub ([though] less than we expected it to).” (eTapestry)

“Lots of research, we felt this served all our needs for registration, summer camp, donor management, events, volunteer registration, surveys and mass emails.” (DonorView)

“After the administrative team researched a few CRM options, Salesforce/PatronManager was a huge financial and educational investment and would be a useful tool that would carry us for the lifetime of the nonprofit. Automations for contacting/communicating with vendors, donors, and patrons were desired. This is a powerful ticket sales product.” (Salesforce)

3.8

Average satisfaction with current CRM solution(s)

Six organizations responded 5 (most satisfied), while only one organization responded 1 (not satisfied at all).

Of those that responded with the highest satisfaction rate (4 or 5):

- ★ 53% use Salesforce
- ★ 18% use a Blackbaud product
- ★ 24% use a different product

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Top Reasons for Dissatisfaction with the CRM

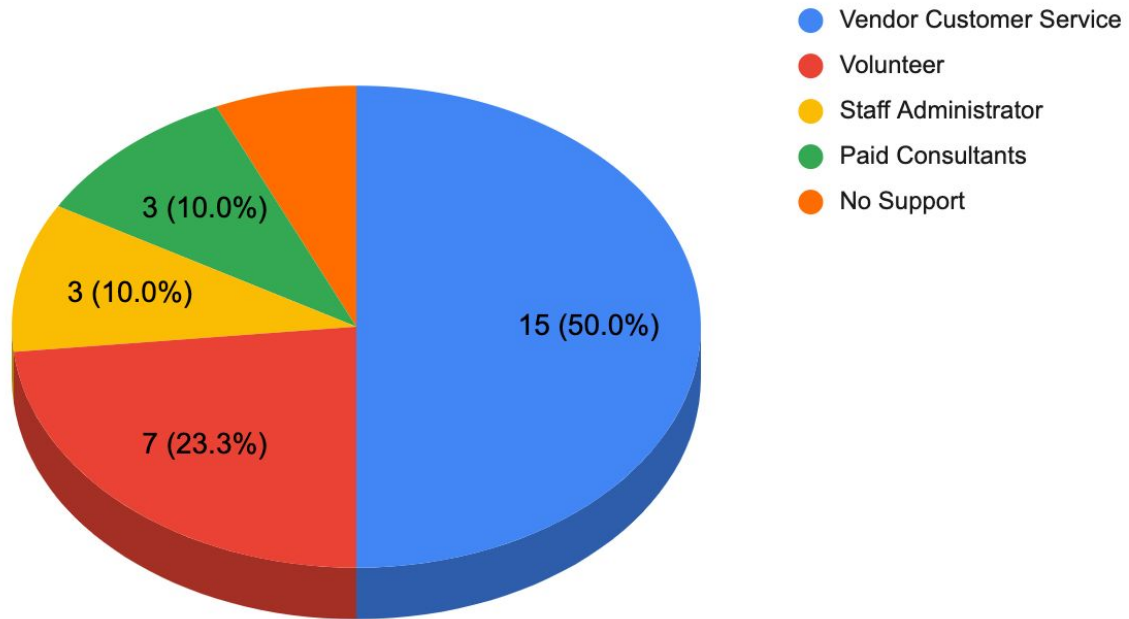
Complexity	32%
Lack of Functionality/Need for Add-Ons	28%
Reporting Complexity	8%
Not Tailored To Our Industry	8%
Not Internet Based	4%
Initial Setup	4%
Ease of Communicating with Volunteers	4%
Donation Pages Not Flexible	4%
Difficult Deliniating Roles	4%
Cost	4%

“It's complicated to use, and requires a full time staff (me) just to manage it.”

“It lacks tools for online giving, email analytics, peer-to-peer fundraising, and online auctions.”

“There are occasionally more complex reports that it isn't able to do for us.”

How do you get Support?

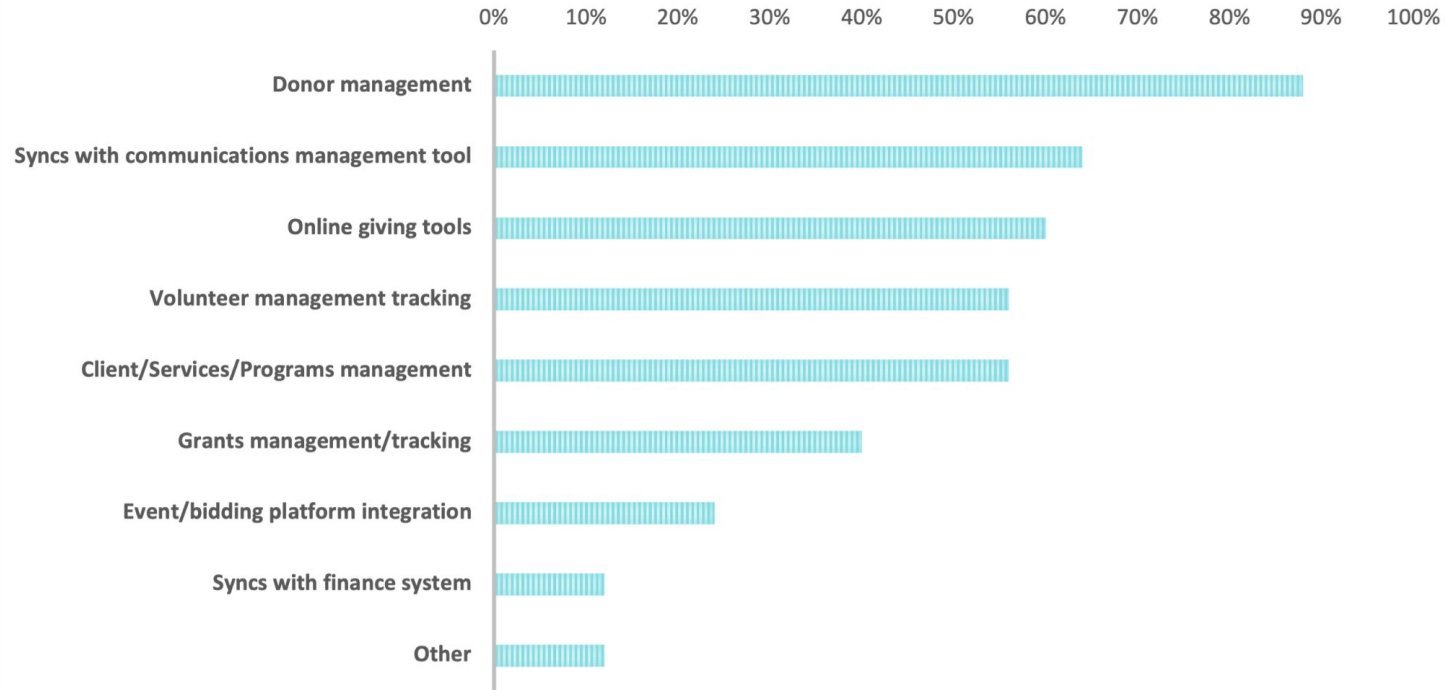


CRM and Staff Resources

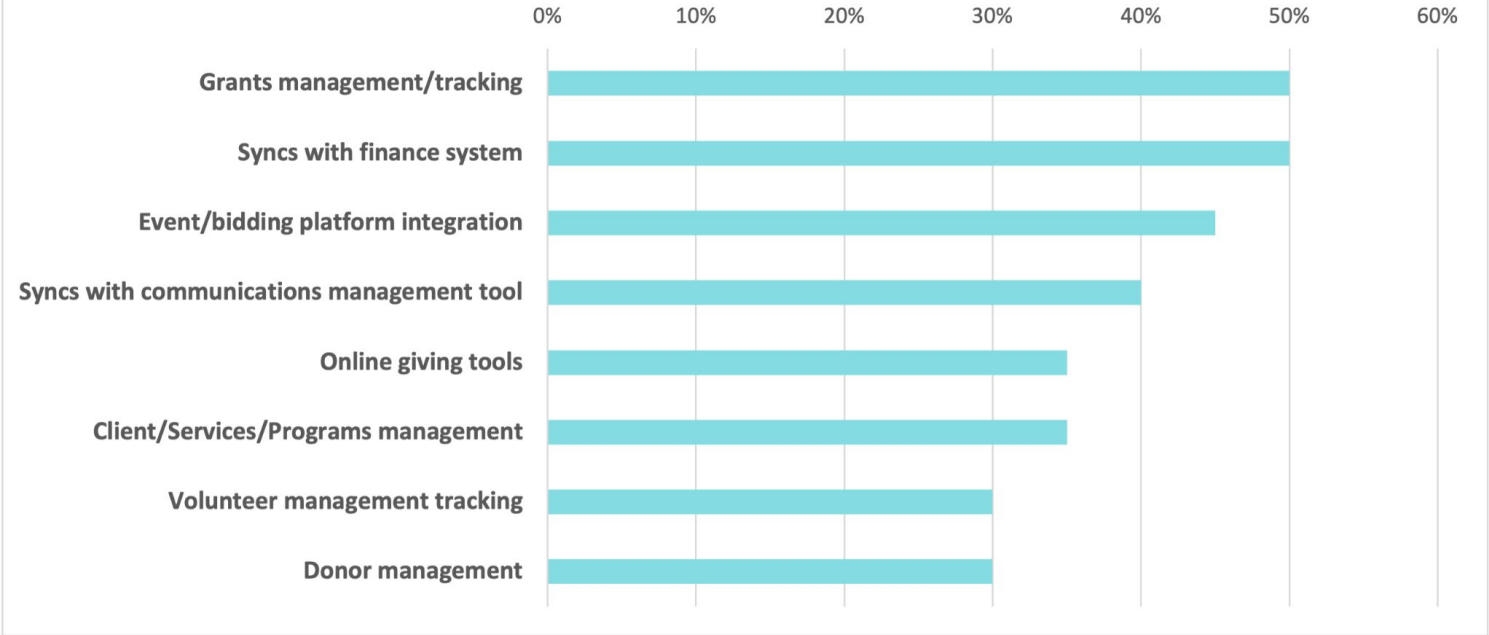
- In nearly half (48%) of the organizations, **5 or fewer** staff members use the CRM.
- In 81% of the organizations, **5 or fewer** staff members are strong or knowledgeable users of the CRM.
- Yet 63% of organizations say their CRM is **critical to their fundraising.**

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WHAT CRM FEATURES DO YOU USE?



What Features Do You Wish Your CRM Had?



Other Wish List Responses

- Better data extraction
- Wills, bequests, stock donations
- Child care licensing information
- Thank you gift inventory
- A robust user community
- **“We wish the features that it does have were better.”**

Other Findings

- More than 50% of organizations do not have a platform for volunteer management or grant management, or they report using spreadsheets.
- No one platform for events/auction management is most popular.
- More than 80% report using online giving tools, but no one platform stands out.
- Most organizations use Google Forms or Survey Monkey for online surveys and forms.
- Most organizations use either MailChimp or Constant Contact for sending mass emails.
- Only 22% report using a texting platform.

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Lessons Learned - Selected Comments

We typically use mainstream products that have a free or very low-cost version. Some products are offered at a significant discount to nonprofits through TechSoup, so I recommend checking there before making a decision. Sometimes cheap/off-brand tools are not worth the trouble.

I know Salesforce is extremely functional, but the learning curve is very steep. Unless a nonprofit has at least 10,000 contacts, I would not recommend Salesforce. [But] if an organization anticipates significant growth, I would highly recommend Salesforce since it can grow, adapt and change, also.

We learned that we should have looped more of the team into the decision get the CRM. This would have made the integrations happen more seamlessly and provided everyone with the correct training needed for their work.

Lessons Learned - Selected Comments

A good lesson learned is not to integrate too many platforms at once. Over the past 2 years, we've slowly integrated with other tools and each one takes more time than expected to integrate and learn how to use the tool. Another lesson learned is to emphasize user adoption and keep on people through trainings and tools to ensure they're using the tool correctly.

Getting things set up properly from the start is essential! I inherited databases that weren't setup properly and it was MUCH harder to fix the issues when the database was already in use.

No CRM can do everything well. I think organizations are best served by choosing a CRM that solidly covers the basics, fully integrates one or two key additional functions (online giving would be my top priority), and has a straightforward import/export process for data from other platforms.



Key Take-Aways

Investing in your technology will help your organization better achieve your goals and mission.

A starting point is a technology audit. The results of a tech audit can provide input to Strategic Planning and help you prioritize next steps. The SVP Tech Resource team can assist with a tech audit.



Resources

Building connections - The SVP Tech Team can connect you with other orgs using same tool(s) for support

Consultants in Tech - A national group of consultants focused on supporting nonprofit organizations.

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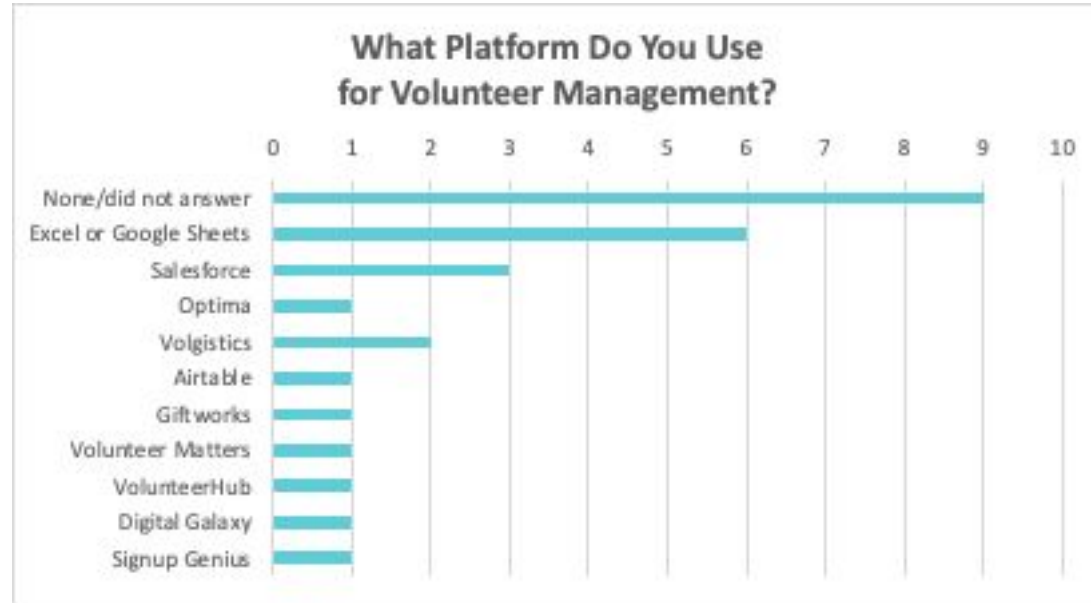


Appendix

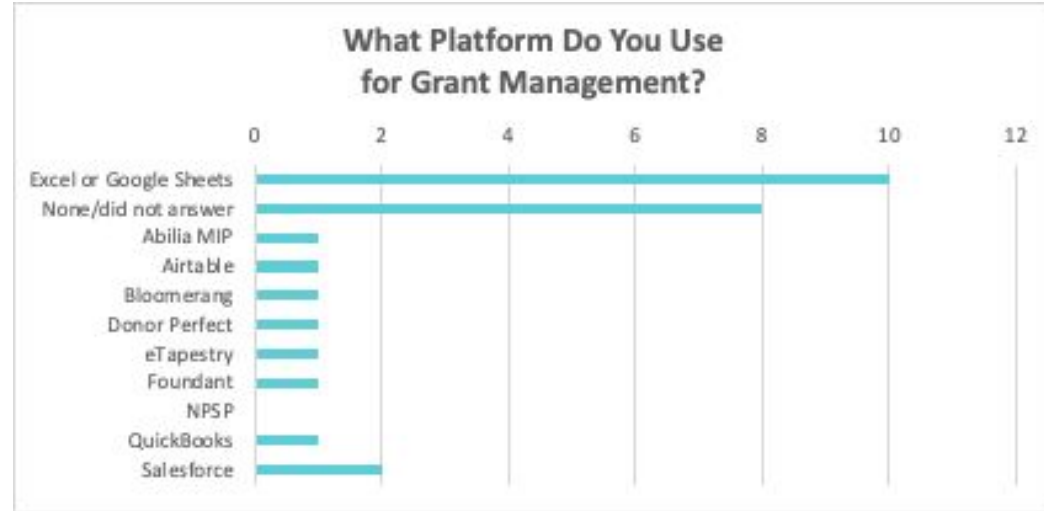
The following slides show the specific tools organizations use for grant management, etc

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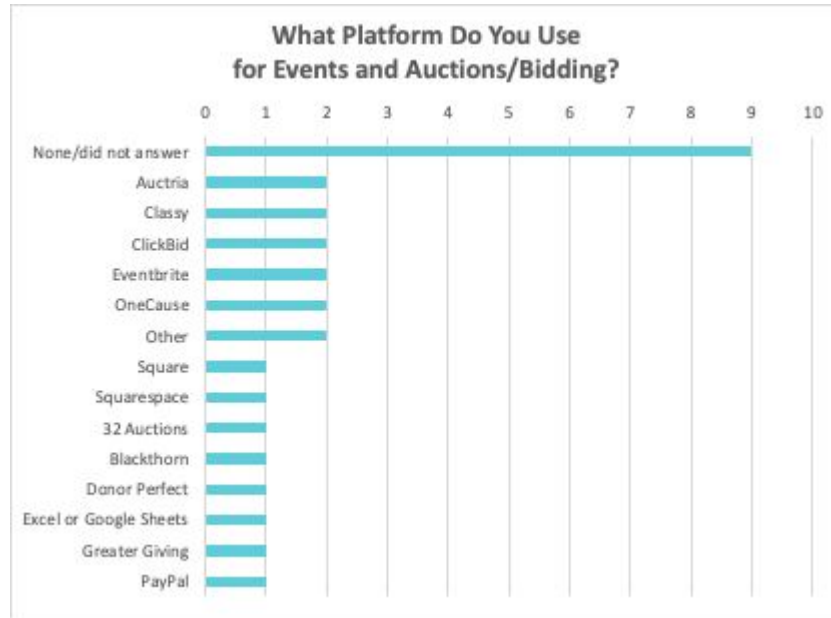
Volunteer Management



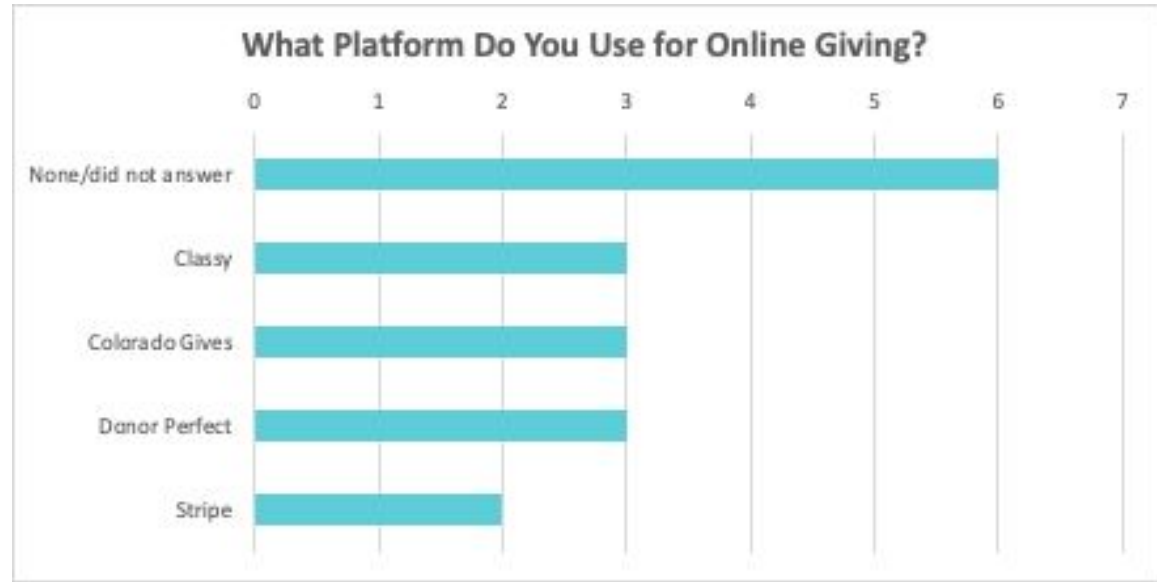
Grant Management



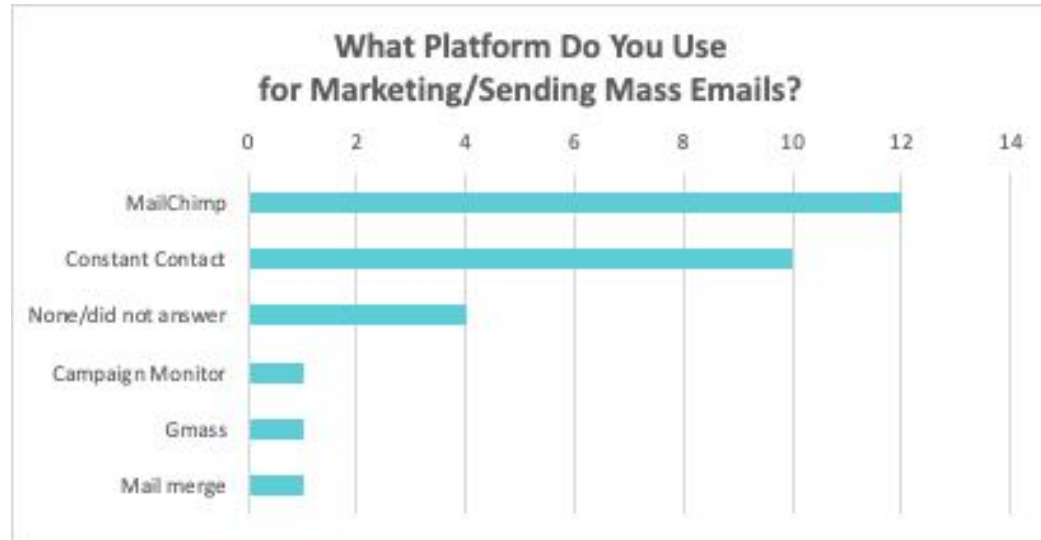
Events and Auctions



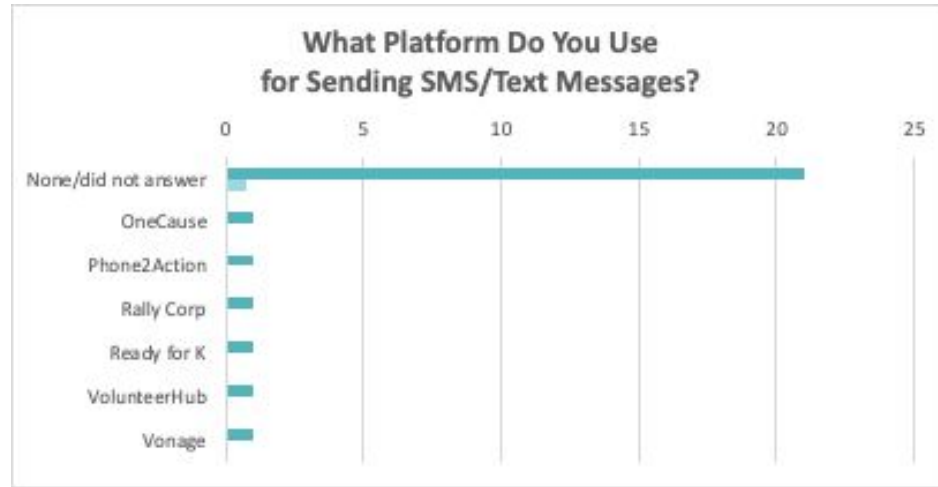
Online Giving



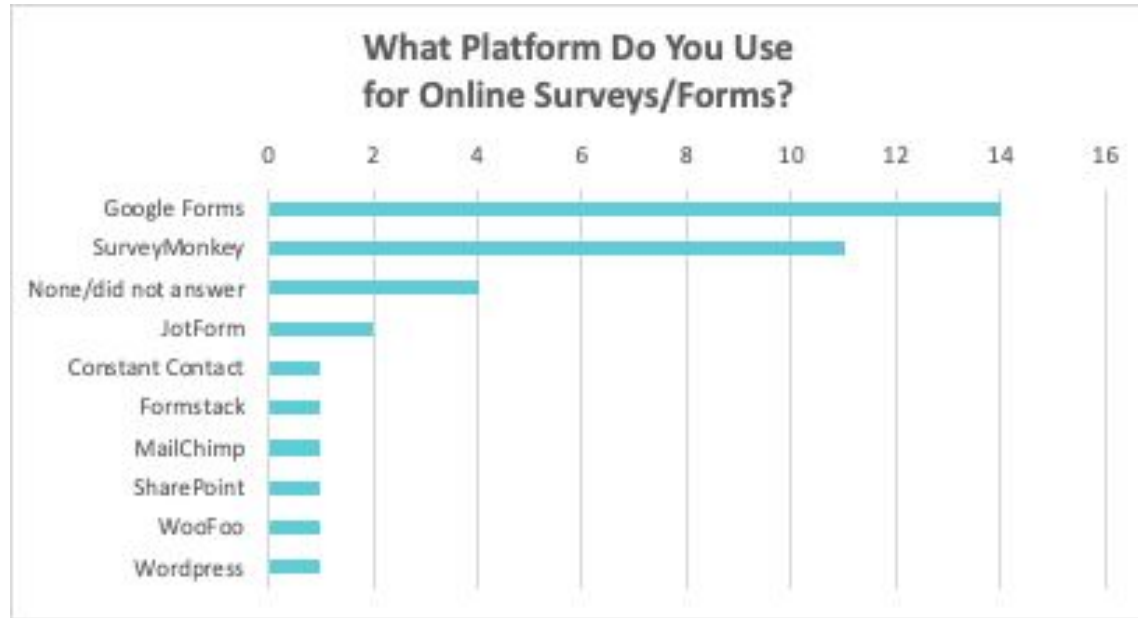
Email Marketings



SMS Text Messaging



Surveys and Forms





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