

THE BUYER'S GUIDE TO DONOR MANAGEMENT SOFTWARE

How to choose a system your team will actually use—and raise more because of it

What’s inside

This guide has several sections: what **CHANGED**, what to **DECIDE**, and how to run a donor management software **EVALUATION**.

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COMPANION WORKBOOK

	Download and fill in	
01	Requirements worksheet	
02	Vendor scorecard	
03	Three-year total cost worksheet	

DOWNLOAD THE WORKBOOK

Start here

You know what your donors need from you. The harder question is what you need from a system.

Shopping for a new nonprofit CRM, often referred to as a donor database, can be challenging. With so many vendors to choose from, it's difficult to know which option is truly best for your organization.

Most vendor websites say close to the same thing. And feature lists look identical. The stakes feel high, because they are: this is a system your team will rely on as a source of truth. It will also house information your donors expect you to keep secure: giving histories, conversation notes, and more.

This guide won't tell you which platform to buy. It will give you the questions to ask, a way to weigh the answers, and worksheets your team can use to make the call—and explain it to your board.

HOW TO USE THIS GUIDE

Read Parts 1 and 2 first. They cover what changed this year, and whether you should be switching at all. The honest answer is sometimes no.

Work Parts 3 through 7 with your team. Everyone on your team has different jobs inside the database. Anyone who touches it should see these questions.

Use Parts 8 through 10 during the evaluation. Demo prep, reference calls, migration, and a 30-day plan that turns an open-ended worry into a finite task.



The appendix is ready to use. Four things you can lift straight out: the questions to send vendors before a demo, the demo scenario script, a reference-call script, and a starter AI policy template.

Download the companion workbook. Three worksheets with the math already built in: a requirements sheet, a weighted vendor scorecard, and a three-year total cost comparison for up to three vendors. [Download it here.](#)

PART 01

WHY THIS YEAR IS DIFFERENT

Why this year is different

If you haven't evaluated donor management software in a while, three things have changed enough to reset your requirements.

1. Donors are sending clearer signals than ever. Most appeals are answering the wrong ones.

[The 2026 Giving Signals Report](#), conducted with The Harris Poll, surveyed more than 1,000 active U.S. donors and 400 nonprofit fundraising leaders.¹ Three findings change what you should require from a system:

- **Your system has to let you tie an ask to a real number, and report back on it.** Specificity beats inspiration. 94% of donors say they're motivated when an organization tells them exactly where their money will go. Asked to compare a generic "every dollar makes a difference" appeal with one that specifies what \$50 or \$200 buys, donors chose the specific version by 88 percentage points.

- **Segmenting by generation and handling a DAF gift cleanly aren't nice-to-haves anymore.** Millennials are giving now, not later. At roughly 72 million strong, they're the largest adult generation in the U.S. 75% plan to give more this year than last, compared with 49% of Gen X and 36% of Baby Boomers and older. And 42% have already used a donor-advised fund or another tax-advantaged vehicle in the past year.
- **Email tools that actually live inside your system matter more than they used to.** There's a channel gap. 69% of donors name email as their preferred fundraising channel, across every generation. Nonprofit leaders report leading with social. Rebalancing toward email is one of the most direct improvements available to you.

94% OF DONORS SAY THEY'RE MOTIVATED WHEN TOLD EXACTLY WHERE THEIR MONEY WILL GO

TURN THIS INTO EVALUATION CRITERIA

Three questions to carry into every demo:

- 01** Can I segment supporters by generation and channel preference?
- 02** Can I show a donor exactly what their gift funded?
- 03** Can I see which channel actually produced the gift, not just that a gift arrived?

71% OF MONTHLY DONORS
WERE STILL GIVING
AFTER 12 MONTHS

24% OF NEW ONE-TIME ONLINE
DONORS WERE STILL
GIVING AFTER 12 MONTHS

2. AI is everywhere. Insight isn't.

AI is everywhere, but few are using it to improve fundraising outcomes. Among 826 nonprofit professionals surveyed, 4.5% use smart donation forms, 2.3% use predictive AI to identify likely mid-level or major donors, and 1.2% use AI agents for fundraising.² **Every vendor you talk to this year will show you AI.** Part 5 gives you a way to tell the difference between a feature that changes what your team can do and one that writes a slightly faster thank-you note.

3. The underlying math hasn't gotten easier

Through the first quarter of 2026, total dollars raised grew an estimated 4.3% year over year while donor counts fell 0.8%—and retention declined across the small, midsize, major, and supersize donor segments. Growth is coming from fewer, deeper relationships rather than more of them.

That puts retention and recurring giving near the center of any software decision. Across the sector, 71% of monthly donors were still giving after 12 months, compared with 24% of new one-time online donors. Monthly giving made up 27% of online revenue overall, and 22% at organizations under \$1M.⁴ Acquisition matters too, and the Giving Signals data says the opening is real: eight in 10 Millennials plan to give to a new nonprofit this year. But new donors are the hardest to keep. The system you want helps you welcome new donors, deepen relationships, and give supporters meaningful reasons to remain involved.



¹ Bloomerang and The Harris Poll, 2026 Giving Signals Report. Survey of 1,000+ active U.S. donors and 400 nonprofit fundraising leaders, March 13-24, 2026. <https://bloomerang.com/resources/giving-signals-report-2026>

² Nonprofit Tech for Good, "New Data Reveals Most Nonprofits Aren't Using AI for Fundraising," January 2026. Based on the Nonprofit Tech for Good Survey of 826 nonprofit professionals. <https://www.nptechforgood.com/2026/01/09/new-data-reveals-most-nonprofits-arent-using-ai-for-fundraising/>

³ AFP Foundation for Philanthropy and GivingTuesday, Fundraising Effectiveness Project Quarterly Fundraising Report, Q1 2026. <https://afpglobal.org/news/fundraising-effectiveness-project-reports-easing-donor-losses-q1-2026-new-data-shows-growth>

⁴ M+R Benchmarks 2026. <https://mrbenchmarks.com/fundraising/>

PART 02

SHOULD YOU SWITCH AT ALL?

Should you switch at all?

Switching costs real time and real money. Sometimes that’s the right trade. Sometimes the honest answer is “not right now,” and discovering that now beats finding it out mid-migration.

Here’s how to tell the difference.

SWITCH NOW IF...	WAIT IF...
You can’t answer "who gave last year but not this year?"	You’re inside 90 days of your year-end or a major campaign.
Failed recurring payments go unnoticed until a donor tells you.	The complaint is one feature, not the system—ask your current vendor first.
Gift acknowledgments regularly take more than 48 hours.	You’re only using a small percentage of the available features—but the ones you use, you use well.
It’s challenging to segment supporters, such as donors at risk of lapsing, potential new donors, or major gift donors.	The real problem is integrations nobody has taken advantage of.
You can’t easily create accurate data reports.	There’s no one on staff to own the transition—a system without an owner fails no matter how good it is.
Your staff doesn’t find your current software to be user-friendly, and it’s difficult to train new staff members to use it.	You can’t name what success would look like six months after go-live.
The one person who understands the database is leaving.	You don't have alignment on requirements across your team.

“Perform an internal audit of ‘*what works*’ versus ‘*what doesn’t*’ and an itemization prioritization of what software features are needed, along with the overall **GOALS AND EXPECTATIONS** of a software package. Also, have a full understanding of what **METRICS** your organization wants to **MEASURE** in its fundraising program so that the proper benchmarks are created when looking at potential software providers.”

Bob Swaney

Robert Swaney Consulting

PART 03

WHAT TO DEFINE BEFORE YOU SHOP

What to define before you shop

Understanding how you use your current system is critical to choosing a new system. Work through these questions with your team before you attend a single demo. The answers become your requirements—and the gaps in your answers are usually the most revealing part of the exercise.



Decide what you're actually buying

Before anything else, settle one question: are you buying a donor database, or a complete giving platform? Both are legitimate answers, and the tradeoff is real. Separate best-in-class tools give you more integrations to maintain. One system gives you fewer logins and one version of the truth, and you live with whatever its weakest module is. Answer this before you shop, because it decides which vendors belong on your list—and because changing your answer halfway through an evaluation is how organizations end up with four systems and no plan.

Who to include

Even a small team has several different jobs inside the database. Make sure you've heard from whoever enters gifts, writes to donors, reports to the board, and reconciles with finance—even if that's three people wearing six hats. Add anyone who will have to approve the purchase.

Ask each of these people the same opening question: what are your top three frustrations with how we do this today? Then have the group vote on which ones a new system actually needs to solve. The ones nobody votes for are process problems. Software won't fix them.



Worksheet: the companion workbook includes a requirements sheet with these questions laid out for your team to fill in, plus space to rank must-haves.

[DOWNLOAD THE WORKBOOK](#)

Questions to answer as a team

- How much does your current system cost? How much are you willing to spend on a new system?
- How many people in your organization use your donor management software? Do they have different levels of access?
- How many account records (names/households/organizations) do you have in your current software? Are they active or inactive? Do you have access to this information?
- What transaction options do you use? Examples include pledges, monthly donations, credit card donations, matching gifts, memorial and tribute donations, and donor-advised fund gifts.

- Do you use separate software for online fundraising, accounting, email, events, or volunteers? Do you want those programs to connect to the system you're looking for?
- How many email addresses do you have on your list? How many lists or segments do you have?
- What kinds of emails do you send? Examples include a monthly newsletter, gift acknowledgments, and appeals. Do you have access to custom email templates?
- What kind of reports do you run, or want to run, regularly? Who has to build them today?
- Does your website connect easily with your donor management system? Can you use that connection to track newsletter signups, online donations, event registrations, and other online actions?

- What does your team do by hand every week that you wish your system could be doing?
- What can't you see today that you wish you could?
- If someone asked you tomorrow which donors are at risk of lapsing, how long would it take you to answer?

Using the answers to these questions, create lists of “must-have” and “nice-to-have” features. Once complete, look for a system that includes all of your “must-have” and many of your “nice-to-have” features. Keep the must-have list short. If everything is a must-have, the list can't help you choose—and you'll end up buying on price or on whichever demo you saw last.

PART 04

WHAT ACTUALLY MATTERS TODAY

What actually matters today

Feature lists are easy to compare and nearly useless for deciding. Organize what you're looking for around the three outcomes you actually need instead. Under each outcome, you'll find what to look for and what to ask during a demo.



OUTCOME 1

Retain more of the supporters you already have

A complete view of each supporter. Giving history, email engagement, event attendance, volunteer hours, notes, and communication preferences on a single record. If your team has to check three places to prepare for one donor conversation, that's the problem to solve.

Visible lapse risk. Not a report you have to remember to run. Something that tells you a loyal donor has gone quiet while there's still time to do something about it.

Fast, automatic acknowledgment. Ask how quickly a gift made online turns into a thank-you, and whether anyone has to touch it.

Segmentation that matches how donors actually differ.

By generation, channel preference, giving history, interest, and lapse risk—not just by gift size.

Impact reporting back to the donor. Given that 94% of donors want to know exactly where their money goes, the ability to tie gifts to a designation or program and report on it is now a core requirement, not a reporting nicety.

Ask in the demo: “Show me how I’d find every donor who gave last year but not this year, and how I’d know that before the year was over.”



OUTCOME 2

Raise more, more predictably

Wealth screening and predictive insights. [Intelligent donor management tools](#) and traditional wealth screening tools can show you who is ready to give and the ideal ask amount for each donor. That way you can spend less time researching donor prospects and more time having the fundraising conversations that matter.

Recurring giving that's managed, not just accepted. Anyone can take a monthly gift. Fewer systems show you when one fails.

Failed-payment visibility and recovery. The question most buyers never think to ask. Across the sector, 71% of monthly donors are still giving after a year and 54% after two—and some of that attrition isn't a donor

choosing to leave at all. It's an expired card, a declined charge, or a fraud flag.⁵ Ask each vendor: when a monthly gift fails, what happens? Who finds out, and how fast? What does the system retry on its own, and what does it hand back? Then ask the one that matters most—can I see how many of my recurring gifts are failing right now?

Donation forms that convert. Branded, on your own domain, mobile-first, and with a monthly option presented well rather than buried.

The giving vehicles your donors actually use. These include DAF gifts, matching gifts, pledges, tribute gifts, and stock. Ask to see each one being entered and reconciled.

Campaign attribution. You should be able to answer “which appeal produced this gift” without guessing.

Ask in the demo: “Walk me through what happens, start to finish, when a monthly donor's card expires.”

OUTCOME 3

Reclaim hours for the work only your team can do

Reporting your whole team can do. If building a board report requires the one person who knows the query builder, you have a single point of failure. Ask whoever will actually run reports to build one during the demo.

Data health that maintains itself. Duplicate detection, address updates, deceased flags, and a way to see how healthy your data is without auditing it by hand.

Mobile access that's genuinely usable. For the donor visit, the event, and the board meeting.

Fewer logins. Ask how many separate systems and passwords your team will end up with.

Ask in the demo: “Have someone on my team, who has never seen this software, build the report I need for my next board meeting.”



Your tools share data, so your team stops re-keying it

Your nonprofit likely manages a variety of donor engagement and fundraising activities on a daily basis. You send emails, review donor data, plan events, launch social media campaigns, call donors, and more. You probably don't manage all of it in one place, which is why it matters how well a new system connects to the tools you keep.

Connections between systems can:

- Save your team time and allow you to avoid manual data transfers and uploads
- Help you access better data insights by pulling information from across different platforms

- Promote cohesion and transparency across fundraising and marketing campaigns, keeping your team on the same page
- Keep fundraising and finance teams aligned

Look for a system that connects to the tools your organization already uses. These might include:

- Accounting software
- Marketing platforms, including email and social media
- Event and auction software
- Payment processors
- Volunteer management tools
- Online fundraising tools

⁵ M+R Benchmarks 2026. <https://mrbenchmarks.com/fundraising/>

ONE CAUTION

A long list of available connections is not the same as a working one. For every connection you actually depend on, ask what syncs, in which direction, how often, and what happens when it fails. Some CRMs will include the different tools listed above, or the CRM itself may be part of a larger system of all-in-one tools, like a giving platform.

PART 05

AI, HONESTLY

AI, honestly

AI is everywhere. The insight that changes your fundraising isn’t—not yet.

Among 826 nonprofit professionals surveyed, 4.5% use smart donation forms, 4.1% use predictive send-time optimization for email, 2.3% use predictive AI to spot likely mid-level or major donors, and 1.2% use AI agents. Most AI use happens in a browser tab, disconnected from the database. A general-purpose chatbot can write you a thank-you letter. It can’t tell you which donor is about to lapse.

Useful AI within a CRM works with the donor data you already have, and it does three things with it: surfaces opportunities you would have missed, tells you where to focus first, and turns that into a next step someone on your team can actually take.

Three levels of AI—know which one you’re being shown

LEVEL	WHAT IT DOES	HOW TO JUDGE IT
Assistive	Drafts, summarizes, rewrites. Thank-you letters, appeal copy, meeting notes.	This can save time, but offers limited differentiation because many general-purpose AI tools provide similar capabilities.
Analytical	Finds patterns in your own donor data. Who is likely to lapse, who is ready for a larger ask, which recurring gifts are at risk.	This is the level worth paying for. Press hardest here. Ask to see it run on data that resembles yours, and ask what it does when your data is thin.
Agentic	Takes action on your behalf. Builds the segment, drafts and queues the appeal, updates the record.	Newest and least settled. Ask to see it working live, not on a roadmap slide—and ask what it will and won’t do without a person approving it first.

And it should leave those decisions to you. AI can prepare, prioritize, and draft. Whether to make the ask—and how to say it to someone you know—stays with your team.

So the question isn’t “do you have AI?” It’s “what does your AI know about my donors that I don’t?”

Seven questions to ask every vendor about AI

Ask these in writing, before the contract. Judge the clarity of the answer, not the perfection of the product: a vendor who tells you plainly what their AI can’t do yet is more trustworthy than one who implies it does everything. A vendor who can answer these clearly is telling you something. So is one who can’t.

ASK	WHAT A GOOD ANSWER SOUNDS LIKE	CONCERNING
Is our donor data used to train your models, or anyone else’s?	A direct yes or no, in writing, in the contract. If aggregated or anonymized data is used, they say so plainly, explain what it means, and tell you whether you can opt out.	Reassurance without specifics. "We take privacy seriously." An answer that only appears in a sales call.
Which AI providers do you use, and where is our data processed and stored?	Named providers, named regions, and the security standards those providers are held to.	They can’t or won’t say. You are entitled to know whose systems your donor records pass through.
Does the AI respect our existing user permissions?	Yes, and they can demonstrate it. If someone can’t see major gift notes today, the AI doesn’t surface them tomorrow.	Permissions and AI are described as separate systems, or the answer is "we’re working on that."
Will AI ever change or overwrite a record without a person confirming?	No—and they show you the confirmation step in the product.	Automatic updates presented as a convenience feature. Anything that writes to donor records unattended.
What signals feed this score, and can I see which ones moved it for a specific donor?	They name the inputs, show the top contributing factors on an individual record, and tell you plainly what the model can’t explain. They tell you what happens when a record is thin.	“The model determines that.” A number with no inputs disclosed. Explanation available only to support staff.
Can we turn AI features off, by feature, at the admin level?	Yes, and they show you the controls in the product.	All or nothing. Or a toggle that support has to flip for you.
If we leave, does AI-generated content come with us—notes, summaries, scores—and in what format?	A clear yes, with the export format named, in the contract.	AI-generated notes and scores that stay behind when you go.



Red flags

- “AI-powered” with no explanation of what data it uses
- AI demonstrated only on the vendor’s sample data, never on anything resembling yours
- The vendor can’t confirm in writing whether your data trains their models
- A system that acts on donor records without a person in the loop
- AI priced as an add-on with a number that isn’t in the proposal—ask for it now, not at renewal

YOU NEED A POLICY BEFORE YOU NEED THE FEATURE

In a survey of over 1,000 nonprofit professionals, 76% had no AI strategy and 80% had no acceptable-use policy for AI. The same survey found organizations over \$1M adopting generative AI at close to twice the rate of those under \$1M—a resource gap, not a reflection of your team’s ability. Boards and funders are starting to ask about this.

You don’t need a 15-page policy. You need five lines your team can follow: what data may go into which tools, who approves a new tool, what always gets

human review before it reaches a donor, what never leaves your system, and who to ask when it’s unclear. A starter template is in Appendix O4.

76% OF NONPROFIT PROFESSIONALS HAD NO AI STRATEGY



⁶ Nonprofit Tech for Good, “New Data Reveals Most Nonprofits Aren’t Using AI for Fundraising,” January 2026. Based on the Nonprofit Tech for Good Survey of 826 nonprofit professionals. <https://www.nptechforgood.com/2026/01/09/new-data-reveals-most-nonprofits-arent-using-ai-for-fundraising/>

⁷ TechSoup and Tapp Network, The State of AI in Nonprofits: 2025. Survey of 1,321 nonprofit professionals fielded in 2024; 550 respondents from organizations under \$1M and 771 from organizations over \$1M. <https://pages.techsoup.org/hubfs/Downloads/The%20State%20of%20AI%20in%20Nonprofits%202025.pdf>

PART 06

SECURITY, DATA, AND OWNERSHIP

Security, data, and ownership

Your new system will handle a large volume of donor data. Keeping this data secure is essential for ensuring donors' trust in your organization. Assess the level of data security offered by each of your top options.

The four fundamentals

Tokenization. Tokenization is the process of exchanging sensitive data for non-sensitive information. The tokens have no inherent meaning or value, meaning that there is no way to return to the original value by just viewing the tokenized data. This helps keep donors' sensitive personal information secure.

Updated changelog. A changelog is a record of all of the updates and security patches made to a software system over time. This log helps you understand how the product has evolved and the steps the vendor has taken to make the software more secure and useful.

PCI compliance. When you use fundraising software to collect and process donors' payment information, you need a way to ensure that information will stay safe. PCI compliance is a set of security measures intended to prevent data theft. Ask which version of the standard they meet and when they were last assessed, not just whether they're compliant.⁸

SOC 2 compliance. SOC 2 compliance is a voluntary security compliance standard for vendors that handle customer data. A software provider that is SOC 2 compliant has been vetted by outside auditors and has been confirmed to comply with five trust principles: security, availability, processing integrity, confidentiality, and privacy. Ask for the report, and ask whether it's Type I or Type II.



Four things to add to the list this year

Payments fraud protection. Your donation form is a target—not for your money, but for card validation. Attackers push hundreds of small gifts through public donation pages to find out which stolen cards still work, because a donation form asks for less than a checkout page does and usually skips the shipping address.

One nonprofit saw 1,727 attempted \$1 transactions before its processor stepped in. Roughly 200 went through, and every one had to be refunded before the account could be reactivated.⁹ The cost lands on you: chargeback fees, refund work, a polluted database, or a processor that shuts you off mid-campaign. Ask which fraud controls are on by default rather than sold as an add-on, what the system does automatically when a burst of small gifts arrives, whether you can identify and reverse them in bulk, and who pays the chargeback fees.



Accessibility. If your organization receives federal funding from the Department of Health and Human Services, this is no longer optional. The Section 504 rule that took effect in July 2024 requires web content and mobile apps to conform to WCAG 2.1 Level AA, and it reaches human services programs and community health centers, not just hospitals. In May 2026, HHS extended the compliance dates by a year: recipients with 15 or more employees now have until May 11, 2027, and those with fewer until May 10, 2028.¹⁰ Even if no rule reaches you, the buyer’s logic holds. Ask whether donation and registration forms meet WCAG 2.1 AA, ask to see the vendor’s accessibility statement, and ask whether it came from an audit or from an overlay widget. A donor who can’t complete your form is a donor you lost without ever knowing.

Where your data goes when AI touches it. Covered in Part 5. Treat it as a security question, not a feature question. And if you don’t yet have rules about what donor data can go where, you are in the majority of organizations—80% of nonprofits have no acceptable-use policy for AI. This is the moment to write one.

Exit terms. The question almost nobody asks until it’s too late: if we leave, what exactly do we get back, in what format, how quickly, and at what cost? Ask whether that includes notes, attachments, custom fields, and AI-generated content—not just names and gifts. Get the answer in the contract.

Major data breaches damage supporters’ trust in nonprofit organizations and lead to uncertainty about providing sensitive personal and payment information in the future. With these measures in place, you can be confident your vendor takes donor data protection as seriously as you do.

80% OF NONPROFITS HAVE
NO ACCEPTABLE-USE
POLICY FOR AI

⁸ NTechSoup and Tapp Network, The State of AI in Nonprofits: 2025. Survey of 1,321 nonprofit professionals fielded in 2024; 550 respondents from organizations under \$1M and 771 from organizations over \$1M. <https://pages.techsoup.org/hubfs/Downloads/The%20State%20of%20AI%20in%20Nonprofits%202025.pdf>

⁹ Digital Defense Fund, “Protect Your Online Donation Page from an Attack.” <https://digitaldefensefund.org/ddf-guides/protect-payment-page>

¹⁰ U.S. Department of Health and Human Services, Nondiscrimination on the Basis of Disability in Programs or Activities Receiving Federal Financial Assistance, 89 FR 40066, published May 9, 2024, effective July 8, 2024. Compliance dates extended one year by Interim Final Rule, May 7, 2026. <https://www.hhs.gov/press-room/hhs-extends-mobile-and-web-accessibility-deadline.html>

PART 07

WHAT IT REALLY COSTS

What it really costs

The subscription is rarely the whole number. Build the full picture before you take anything to your board.



The cost categories to ask about

CATEGORY	WHAT TO ASK
Data conversion	What does it cost to move our data across, and what affects that price? The source, format, age, and condition of your current data all matter.
Implementation	What’s included in the setup, and what costs extra? Does implementation include data conversion, or is that separate?
Software licensing	Is this billed monthly or annually? What causes the price to change—records, users, features, gift volume?
Training	What’s included, in what format, and what does additional training cost when we hire someone in year two?
Support	What channels, what hours, and what is the committed response time? Is there a service level agreement in writing?
Payment processing	What are the transaction fees, and how do they compare to what we pay today? Are there fee-offset options for donors who want to cover them?
Integrations	Which connections are included, which are paid add-ons, and which require a third party?
Ongoing consulting	Will we need outside help to keep this running well? How much do comparable organizations spend?



Worksheet: the companion workbook includes a three-year total cost worksheet with these categories built in and a side-by-side comparison for up to three vendors. The math is done for you—fill in the numbers each vendor gives you.

DOWNLOAD THE WORKBOOK

Free isn't free. Neither is staying put.

The real comparison isn't free versus paid. It's the full cost of every option—including the one where you change nothing.

Start with what “free” actually means for the platform you're evaluating. Many no-fee, no-subscription tools recover their cost by prompting the donor to add a “tip” at checkout, often pre-selected by default and set well above what a card processing fee would run. The nonprofit doesn't pay less. The donor might, usually without realizing it, and often without a clear sense of where that money goes. That's not free. It's a cost shifted onto the person the nonprofit is accountable to. This payment model has resulted in [lawsuits](#) and [calls for more transparent and ethical platform costs](#).

Add up what you spend today: subscription, transaction fees, the add-on tools you bought to fill gaps, and the hours your team spends moving data between systems that don't talk to each other. That last number is usually the largest, and the one nobody counts. Run the same math on every option in front of you, free ones included. Then decide.

Two numbers, two board meetings

Return on investment and total cost of ownership answer different questions, and they belong in different conversations.

- **Return on investment is the justification.** It belongs in the first board conversation. If your donor data currently lives in three places and someone spends four hours a week reconciling them, that time has a salary cost, and eliminating it is a real return. So is a percentage point of retention.

- **Total cost of ownership is the bottom line.** It belongs in the second board conversation. This is where you show the upfront investment, the ongoing operating cost, and the comparison across vendors over three years.

If one vendor's offer is missing something you need, price the way you'd fill that gap—usually another tool—and add it to their column. Otherwise you're not comparing the same thing.

PART 08

RUNNING THE EVALUATION

Running the evaluation

Once you have narrowed the field to a handful of systems that fit your needs, it's time to schedule demos. Live demos are a great way to see each product in action and get some of your questions answered directly. To make the most of them, follow these steps before, during, and after.



Before the demo

Do your homework. What is the history of this company? How long have they been in business? What types of organizations use their services and products?

Have the vendor take you through a full proposal review. What will this cost? Is it in your budget? Can you afford all the features you want?

Ask about data conversion and cleanup. How easy is it to transfer data to a new system? What support does the vendor offer to manage this process?

Verify credit card transaction fees and surcharges. Understand how these charges will affect your donors' experience and your budget.

Send your written questions in advance. Ask each vendor the same set, and ask for written answers. This shifts the conversation from their script to your requirements—and gives you something you can put in a board packet. A ready-made list is in Appendix O1.

Decide what you want to see, and tell them. Give every vendor the same three or four scenarios drawn from your real work. That way, your comparisons actually compare.



During the demo

Involve all of the members of your team who will be using the system.

- Ask the questions you came up with before the demo.
- Ask to see your specific requirements in action: reports, transactions, and the workflows your team runs weekly.
- Verify website and online donation form integration.
- Verify how long the conversion process will take.
- Ask about security and data ownership.
- Identify the right point of contact for questions about the software.
- Take the keyboard. Have someone from your team do something in the system while you watch. A demo shows you what the software can do. Five minutes of hands-on shows you what it feels like to use.

After the demo

Call your trusted consultants for their insights on the software.

Decide whether you need another demo. Someone else on your team who didn't attend the first one might need to see the tool in action and visualize how it will fit into their day-to-day workflow. Determine what additional information you need and request that the demo focuses on those details.

Score each vendor while it's fresh, using the same criteria. Memory blurs fast after the third demo. The scorecard in the companion workbook only takes ten minutes per vendor.

SCENARIOS WORTH REQUESTING

Give every vendor the same list. Appendix 02 has the full script.

- 01 Find every donor** who gave last year but not this year.
- 02 Enter a monthly gift**, then show me what happens when the card expires.
- 03 Build the report** I take to my board, using someone on my team who has never seen this system.
- 04 Show me one donor record** with giving history, email engagement, and event attendance in a single view.
- 05 Show me an AI recommendation**, and show me the reasoning behind it.

Talk to real customers—including ones the vendor didn't pick

Ask each vendor for three references at your size and in your subsector. Then find one or two more on your own, through a peer network or a professional association. The reference a vendor didn't hand-select will tell you the most.

Four questions worth asking every reference:

- What surprised you after go-live?
- What took longer than you expected?
- What do you still work around?
- Would you choose them again?

A call script is in Appendix 03.



PART 09

SWITCHING WITHOUT BREAKING ANYTHING

Switching without breaking anything

People don't usually worry about the purchase. They worry about the six months after it. Here's the good news: almost everything that goes wrong in a migration is predictable, which means almost all of it is preventable.

Clean first, migrate second

Migrating messy data means paying to move a mess. Before conversion begins, agree on dates and owners for standardizing formats, merging duplicates, and clearing out what's outdated. Decide what you're deliberately leaving behind, and write it down so nobody goes looking for it after the migration concludes.

Protect your recurring donors

This is the step most likely to cost you real money if it's rushed. Ask your new vendor exactly how existing monthly gifts transfer, whether donors will need to re-enter payment details, and whether an overlap period between systems is possible. With 71% of monthly donors still giving after a year and 54% still giving after two,¹¹ a handful of sustainers lost in a rushed migration is a multi-year revenue loss, not a one-time inconvenience.

If donors do need to act, tell them early, tell them plainly, and thank them for it. Then watch the failure rate closely for 60 days.



6 WEEKS

AFTER LAUNCH AND AGAIN AT SIX MONTHS: SCHEDULE A REFRESHER

Name an owner

One person needs clear responsibility for the transition and enough authority to make decisions. Establish who configures permissions, who sets up workflows, who connects the other systems, and by when. Unclear ownership is a common cause of delayed launches.

Plan for adoption, not just go-live

Set a target you can measure. Something like “every gift entered in the new system by March 15,” or “acknowledgments out within 24 hours by the end of the first quarter.”

Find your early adopters. Whoever takes to it first becomes the person others ask, which is faster and less awkward than escalating to you.

Train more than once. Schedule a refresher six weeks after launch and again at six months. New habits don’t form in a single session, and by week six people know what they actually need to ask.

Share the wins out loud. When the acknowledgment backlog disappears or the board report takes twenty minutes instead of a morning, say so. Adoption is a confidence problem as much as a training problem.



¹¹ M+R Benchmarks 2026. <https://mrbenchmarks.com/fundraising/>

“The #1 mistake I see nonprofits make in shopping for donor database software is thinking that the process ends when a choice is made. Choosing a product is just the start. Be sure to **BUDGET TIME AND MONEY** have your staff take the time required to **TRANSFER YOUR EXISTING DATA** into the new software. And budget the time and money to **TRAIN YOUR STAFF** on how to use it effectively. Initial training is great but make sure to have check-ins each quarter too.”

Mark A. Pitman
The Fundraising Coach

PART 10

YOUR 30-DAY DECISION PLAN

Your 30-day decision plan

An open-ended search expands to fill whatever time you give it. Give it four weeks.



WEEK	WHAT YOU DO	WHAT YOU HAVE AT THE END
Week 1—Define	Work through Part 2 with your team and decide whether you’re switching at all. If yes, work through Part 3. Rank your must-haves. Brief your board.	A written requirements list and a short must-have list everyone agrees on.
Week 2—Shortlist	Research candidates. Send your written questions to three or four vendors. Book demos with the same scenarios for each.	Written answers from every vendor, and demos on the calendar.
Week 3—See it work	Run the demos with your team. Take the keyboard. Score each vendor the same day. Start the total cost worksheet.	A completed scorecard and cost comparison for each finalist.
Week 4—Verify and decide	Call references, including at least one you found yourself. Confirm exit terms and AI answers in writing. Compare three-year costs. Make the decision.	A decision you can explain in one page to your board.

Before you sign

Find a partner that will grow with you. Hopefully, your nonprofit will grow beyond the size it currently is. Make sure your software grows with you. Will the core functionality be there? Will it help you retain donors? Look at the broad picture and not just one or two select features.

Understand how the vendor will keep you updated on changes. With cloud-based software, updates happen behind the scenes, so vendor communication is key. How often is the software updated? Do they keep an up-to-date product blog or changelog?

Verify the next steps. After you buy a solution, you'll need to get your team set up to use it. Make sure you understand exactly what will happen and when before you sign on the dotted line.

Confirm the answers you were given verbally. Anything that mattered in a demo—AI data handling, exit terms, response times, what implementation includes—should appear in the contract. If it isn't written down, it isn't a commitment.



MAKING YOUR CHOICE

Making your choice

There’s no perfect system. There’s a right-sized one—the one that fits how your team actually works, and helps you do more with everything you already have.

Share this with your team as you search and vet. Work the questions, score the vendors, check the references, and run the numbers. Then trust the work.

You’ve done the diligence. Whatever you choose next, you’ll be choosing it with eyes open—and a team that trusts its system is a team that can aim higher.



PUT YOUR EVALUATION PLAN INTO ACTION



Download the free companion workbook and define your requirements, compare vendors, and calculate the cost of each option.

[DOWNLOAD THE WORKBOOK](#)

Download the companion workbook

Three worksheets with the math already built in:

- Requirements worksheet
- Vendor scorecard
- Three-year total cost worksheet

Editable, ready to fill in with your team. The scripts and templates in the appendix are yours to copy straight out.

Sources for every figure cited in this guide appear as footnotes on the last page in the section where they appear. All figures verified September 2026. Sector benchmarks in this category are updated quarterly—check the linked sources for the most current data.

APPENDICES

01 QUESTIONS TO SEND VENDORS IN ADVANCE

02 DEMO SCENARIO SCRIPT

03 REFERENCE-CALL SCRIPT

04 STARTER AI POLICY TEMPLATE

Questions to send vendors in advance

Send the same list to every vendor before the demo. Ask for written answers.

Sending questions in advance does three things: it shifts the conversation from the vendor's script to your requirements, it gives you comparable answers instead of comparable impressions, and it produces a document you can put in a board packet.

Copy this list, add anything specific to your organization, and send it with your demo invitation.

About the company

- 01** How long has your company been in business, and how long has this product been on the market?
- 02** How many organizations of our size and type use this product today?
- 03** How often do you release updates? Do you publish a changelog or a product roadmap?
- 04** Have you been through an acquisition or merger in the last three years? Are any products being sunset?

What we get, and what it costs

- 05** List every feature included in the base plan, and every feature that costs extra.
- 06** Provide a total three-year cost for an organization with our record count and gift volume, itemized: data conversion, implementation, licensing, training, support, integrations, AI fees, and transaction fees.
- 07** What causes the price to change records, users, features, gift volume? What happens at renewal?
- 08** What are your payment processing fees, and do you offer donors the option to cover them?

Getting started

- 09** Describe your migration process and the typical timeline for an organization our size.
- 10** What data do you move, and what do you not move? Are notes, attachments, and custom fields included?
- 11** How do existing recurring gifts transfer? Will our recurring donors need to re-enter payment details?
- 12** What is included in implementation, and what does our team need to do ourselves?
- 13** What training is included, and what does training a new hire cost in year two?

Running it day to day

- 14** How are recurring gifts, failed payments, and refunds handled?
- 15** What reporting is available out of the box, without custom work or a specialist?
- 16** Which integrations are native, which are through a third party, and which cost extra?
- 17** What support do we get—which channels, which hours, and what is the committed response time? Is there a written service level agreement?
- 18** How many separate logins will our team have across your products?

Security, data, and AI

- 19** Which version of PCI DSS do you meet? Are you SOC 2 compliant, and is your report Type I or Type II?
- 20** Is our data used to train your AI models, or any third partys? If aggregated or anonymized data is used, explain what that means in practice and whether we can opt out.
- 21** If we leave, what data do we get back, in what format, how quickly, and at what cost? Does it include notes, attachments, custom fields, and AI-generated content?
- 22** What fraud controls are included by default, and which cost extra? What happens automatically during a card-testing attack, and what do we have to do ourselves?

References

- 23** Provide three reference customers at our size and in our subsector, with contact details.

Demo scenario script

Give every vendor the same scenarios, so you are comparing like with like.

A demo shows you what the software can do. A scenario shows you what it feels like to use. Send these in advance and ask each vendor to walk through all five.

DURING EVERY DEMO

Bring everyone who will use the system. Ask your questions rather than following theirs. Take the keyboard for at least five minutes. Note anything the vendor promises verbally—it needs to appear in the contract later. And score the vendor the same day, while it is still fresh.

SCENARIO	WHAT TO WATCH FOR
01 A \$5,000 grant arrives from a donor-advised fund sponsor. The check is from the sponsor, the advisor’s name is on the paperwork, and the donor is in a memo line.	How does it land, how does it get soft-credited to the right household, and how do we acknowledge an actual human? Ask what a fundraiser has to do by hand. Then ask what happens when that same donor gives again next year.
02 Build a segment of donors who gave \$100–\$499 last year. Draft an appeal that names what \$250 buys. Send it. Then show us the impact report that goes back to the people who gave.	Most systems handle the ask and break at the report-back—which is the half that drives retention. Watch for the moment the vendor leaves the product, and count how many separate tools that sequence touched.
03 Have someone on our team who has never seen this system build the report we take to our board.	Insist on this one. Hand over the keyboard. If it needs the vendor to drive, you have found a single point of failure.
04 Show us one donor the system says is ready for a larger ask. Show the signals behind it, and what it says when the record is thin. Then let us mark it wrong.	Can it name its inputs in plain language, on that donor’s record? Could you repeat the reasoning to a board member? And what does the system do with your correction—anything at all?
05 Log in as a part-time gift processor and ask the AI a question that can only be answered from major gift notes.	The answer should be nothing. If the AI can see what the user can’t, permissions and AI are two systems rather than one. Most vendors have never been asked to demo this, which is exactly why it is worth a slot.
06 Add your own.	Pick the thing your team complains about most often. That is the scenario that will tell you the most.

Reference-call script

Ask the same five questions of every reference.

Ask each vendor for three references at your size and in your subsector. Then find one or two more yourself, through a peer network or professional association. The reference the vendor didn't hand-select will usually tell you the most.

Opening

"Thanks for taking the time. We're evaluating [vendor] and we're trying to understand what it's actually like once you're past the sales process. I have about five questions that should take twenty minutes."

The five questions

- 01 What surprised you after go-live?** The open-ended one. Ask it first, before you've narrowed their thinking. Then stay quiet.
- 02 What took longer than you expected?** Migration timelines are the most commonly optimistic number in this category. Ask how long theirs actually took, start to finish.
- 03 What do you still work around?** Every organization has something. If they say "nothing," ask what the last thing was that made someone on their team sigh.

- 04 How did your team take to it—and was anyone resistant?** Adoption is where most of the value is won or lost. Ask what they'd do differently about training.
- 05 Would you choose them again?** Then wait. The pause before the answer is often more informative than the answer.

If they use AI features, add

- 06** "Has the AI told you anything you didn't already know?"
- 07** "Do you trust it? Would you act on a recommendation without checking it yourself?"

If migration is your biggest worry, add

- 08** "What happened to your recurring donors during the switch? Did you lose any?"
- 09** "What did you wish you'd cleaned up in your data before you started?"

Starter AI policy template

Five decisions your team needs written down. One page is enough.

In a survey of 1,321 nonprofit professionals, 76% had no AI strategy and 80% had no acceptable-use policy for AI. **You don’t need a fifteen-page document. You need five decisions your team can actually follow.**

Fill in the brackets, share it with everyone who touches donor data, and revisit it once a year.

BRINGING IT TO YOUR BOARD

Boards are increasingly asking how AI is being used and how donor data is protected. A one-page policy answers that question before it becomes uncomfortable. Share it as an information item, note who owns it, and put the annual review on the calendar.

[Organization name]—AI Use Policy

Adopted [date] - Reviewed annually - Owner: [name, role]

01 What we use AI for

We use AI to [drafting donor communications, summarizing notes, analyzing giving patterns, building reports]. We do not use AI to [make final decisions about individual donors, generate impact claims or program outcomes, or replace human review of anything a supporter will read].

02 What data may go where

Donor names, contact details, payment information, gift history, personal notes, and anything shared in confidence may only be used in [approved system(s)]. This information must never be entered into a public or consumer AI tool. Anonymized or general questions—writing help, research, brainstorming—may use [approved general tools].

03 Who approves a new tool

No new AI tool is used with organizational data until [name, role] approves it. Approval requires clear answers to: does this vendor train on our data, where is our data processed, and can we get it back or delete it? Approved tools are listed at [location].

04 What always gets human review

A person reviews and approves anything AI-generated before it reaches a supporter, a funder, or the board. AI does not change donor records without a person confirming. When AI has meaningfully shaped something we publish, we are willing to say so.

05 Who to ask

When it isn’t clear whether something is allowed, ask [name] before doing it. Nobody will be criticized for asking. We would rather answer the question than discover the answer later.

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