

# Decision Guide: Choosing the Right Technology Solution for Your Community Foundation

Community foundations play an integral role in serving our communities' greatest needs by supporting local nonprofits and helping individuals become impactful donors. Community foundations are no less in need of systems to efficiently manage operations than any other organization—in fact, more so due to their unique activities, organizational structures, and requirements.

However, no matter how clear the need is, investing in technology is a big step and a time-consuming process. In addition to the time it takes for vendor research and selection, it's important to consider the resources available to implement new software, set up integrations if using multiple disconnected systems, and provide ongoing support. Whether large or small, many community foundations don't have dedicated IT staff to take on these responsibilities.

Selecting a single solution that manages all your community foundation's core activities—such as fund accounting, fundraising, online donations, events, grants, and scholarships—empowers your existing staff without requiring in-house IT support. It's valuable to consider a solution designed specifically for community foundations that makes it easy for your leadership, finance, programs, and development team members to collaborate and work more efficiently and effectively.

Community foundations of all types and sizes will discover that a single solution offers many benefits. Your foundation will save time and money with the ability to streamline processes, avoid duplicative data entry, break down silos with one reliable system of record, and collaborate with one software partner. Plus, being able to work more efficiently will help your team feel more effective in their roles and reduce burnout—improving staff retention.

While deciding to move to a single solution helps focus your search for new technology, the process can still feel overwhelming. In conversations with vendors, it can be challenging to determine how effective a software solution will be for your donors, nonprofits, board, and staff and whether it will provide a good return on investment.

We've provided a list of 16 suggested questions to help you find the right solution for your community foundation. Alongside each group of questions, we've explained why they're important to ask and what to consider when reviewing vendor responses. Use this worksheet to take notes during your conversations.

Questions	Why It's Important	Your Notes From Vendor Conversation
<p>Ensuring Data Integrity, Security, and Decisions</p> <p><i>1. How will your software help us ensure the accuracy, completeness, and consistency of our data so we can make more educated, data-based decisions?</i></p> <p><i>2. How does this solution protect our data and establish more robust security measures?</i></p>	<p>Community foundations have a constant flow of important and sensitive donor, fundraising, nonprofit, accounting, and organizational data. Managing this data with numerous spreadsheets or multiple disconnected systems with varying entry points and user standards increases the margin for human and system error and data compromise.</p> <p>Single solutions built specifically to meet the unique needs of community foundations can break down data silos and eliminate the inefficiencies and risks created by duplicative data entry. Building reliable and secure data fosters trust and enables informed decision-making across your organization and key stakeholders, including donors, fundholders, and your board. Increased confidence in your organization's approach to data management strengthens relationships and drives commitment to future initiatives.</p>	

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<p>Streamlining Workflows and Increasing Efficiency</p> <p><i>3. How does this solution help our organization streamline processes?</i></p> <p><i>4. How does your software help my organization break down silos and work better together?</i></p> <p><i>5. What on-site support or staff roles are needed to maximize our use of the software?</i></p>	<p>A single system that syncs across core functions, including fund accounting, constituent relationship management (CRM), fundraising, and events, will enable your community foundation to manage operations more efficiently, freeing up time to focus on your mission. Solutions that also enable grant and scholarship management further simplify your operations.</p> <p>Connecting your data and the departments across your organization will allow you to streamline processes, building efficiency and inter-organizational trust. Analysts, accountants, fund managers, and other specialized individuals should be free to pull their own reports. Increased connection enables cross-functional collaboration, interdepartmental support, and institutional knowledge sharing.</p> <p>Solutions that include a donor portal can also enhance the donor experience and streamline processes for fund advisors by allowing them to access their accounts to see balances, review fund statements, recommend grants, and see a real-time view of their account activity.</p> <p>Selecting a single, easy-to-use solution prevents the need for in-house IT expertise. Your staff will be empowered with tools designed to make their work easier, and you won't be required to allocate resources for additional IT support to set up and maintain multiple disconnected systems.</p>	

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<p>Fulfilling Charitable Promise and Brand</p> <p><i>6. How does your software help us support our donors, build relationships, and provide the information fundholders expect?</i></p> <p><i>7. How does your software help our organization manage our unique fee structure?</i></p> <p><i>8. How does your system support our foundation's community presence and brand?</i></p>	<p>A solution that streamlines fundraising and donor stewardship activities helps increase staff availability to pursue revenue-generating activities and program development.</p> <p>Systems that can collect online donations also streamline how your community foundation interacts with the public by allowing them to easily donate to a fund, find a grant in the grant catalog, and purchase event tickets. This functionality can also be used to instantly create funds and online donation pages to respond to disasters and other urgent community needs.</p> <p>Solutions with online donations functionality embedded on your website enable you to maintain your brand's look and feel, which is important when building awareness and relationships with stakeholders.</p> <p>It's also important to learn whether a solution will provide fundholders visibility and access to the funds they support. When fundholders are given the power to manage their own funds and know how the money is being used, they are more likely to continue or even increase their support of your organization.</p>	

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<p>Benefiting from Demonstrated Experience and Proven Expertise</p> <p><i>9. Describe your organization's experience working with community foundations similar to ours, both in terms of size and type. Can you provide references?</i></p> <p><i>10. What are your organization's strengths? Where are your weaknesses?</i></p> <p><i>11. How will you ensure the software continues to meet the needs of our evolving organization and sector?</i></p>	<p>Community foundations have unique requirements, and different sizes and types of organizations bring even more specific needs. Whether your community foundation is small or large, placed-based, faith-based, or other, it can be beneficial to work with a vendor who has proven experience working with similar organizations and understands the nuances and your specific needs.</p> <p>Transparency from a vendor on where they have been most successful with their software and where they have room to grow is critical. No vendor does everything perfectly. They should be honest and follow up with their plans to enhance areas where opportunities lie. A vendor that regularly updates its software and services and is committed to continual improvement will enable your organization to evolve and grow.</p> <p>A vendor should also demonstrate their commitment to listening to and learning from their clients so they can meet and anticipate your needs.</p>	

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<p>Receiving Exceptional Service and Ongoing Support</p> <p><i>12. Describe your onboarding process.</i></p> <p><i>13. What is the timeline for the onboarding process? When can we expect to "go live"?</i></p> <p><i>14. What will ensure our organization's ongoing success with a new software solution?</i></p> <p><i>15. How can we learn from and connect with other software users?</i></p>	<p>Identifying the best solution for your community foundation goes beyond checking off a list of wanted software features and functionality. How will the vendor implement the software, onboard your team, and set up your organization for long-term success? What type of ongoing support and learning opportunities does the vendor provide throughout your journey as a client? A vendor with a demonstrated commitment to client service and support can be more than just a software provider—they can become a philanthropic partner.</p> <p>A vendor that is a true partner will offer ongoing education and opportunities to connect with staff, fellow clients, or others in the sector through webinars, user groups, and conferences.</p> <p>It's also important to understand how user-friendly a software solution will be and whether it will require in-house IT support. A system that's easy for your team to use means not having to reallocate resources to extra staffing.</p>	

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<p>Empowering Staff and Reducing Burnout</p> <p><i>16. How will your software help us support and empower our staff to prevent burnout and reduce turnover?</i></p>	<p>Pursuing your community foundation's mission is passion work, but it can also be difficult, frustrating, and tiring if you have outgrown systems and processes. Staff need to feel empowered to make a difference and continue growing in their career, not bogged down by manual data entry or barriers caused by human error. Spending days or weeks on fund reconciliations, struggling to track fund transfers, tediously allocating gains or losses, or making year-end journal entries can leave your staff in a cycle of fighting inefficiencies rather than finding growth and fulfillment in their role.</p> <p>A solution that enables staff to work more efficiently will help team members feel more effective in their roles and reduce burnout—improving staff retention. Connected data and a flow of information across your foundation enable you to make collaboration part of your organizational standards.</p> <p>Increased collaboration results in cross-functional trust and aligns your team with a shared mission which, in turn, also supports staff retention and helps prevent rapid turnover.</p>	

Taking the time to ask these questions will help your organization choose a single technology solution that best meets your specific needs. The time and effort spent will be more than worthwhile. Investing in the right software for your community foundation means a return on investment beyond dollar signs!

To learn more about Foundant's solutions for community foundations and how we'd answer these questions, [watch our upcoming demonstration webinar](#).