

Software Functionality Specific to Major Giving

The following checklist contains *added* functionality to seek in software that will be used to track major giving or in tracking major giving through contact management software. It does not include basic functions that every software system should have, such as name and contact information, gifts and gift history, renewal dates for annual appeals, etc. Space is available to allow you to list your own requirements.

• Name of spouse, children, and business assistant (if not on main database)	<input type="checkbox"/>
• Contact reminders (ticklers)	<input type="checkbox"/>
• Interactions as phone calls, lunches, committee meetings	<input type="checkbox"/>
• Committee assignments	<input type="checkbox"/>
o Station committees on which donor serves	<input type="checkbox"/>
o Assignment of prospect to committee members	<input type="checkbox"/>
• History of committee and volunteer activities	<input type="checkbox"/>
• Donor cultivation (moves management) system	<input type="checkbox"/>
• Research information:	<input type="checkbox"/>
o Other non-profits the donor supports	<input type="checkbox"/>
o Net worth (if not on main database)	<input type="checkbox"/>
o Income (if not on main database)	<input type="checkbox"/>
o Education level	<input type="checkbox"/>
o Employment, current and past	<input type="checkbox"/>
o Marital status including survivor information	<input type="checkbox"/>
• Actionable comment fields (can retrieve information via search)	<input type="checkbox"/>
• Invitee and attendee event tracking, including table assignments	<input type="checkbox"/>
• Affiliations or special interests at the station: programs, radio, television, other clubs	<input type="checkbox"/>
• Summarize donor records for use by Board, development, prospect committees	<input type="checkbox"/>
• Export information to word processing or spreadsheet for mailings and analysis	<input type="checkbox"/>
• Customizable user defined fields for recording additional information	<input type="checkbox"/>
• Synchronize with main database system (if external)	<input type="checkbox"/>
• Allows development of standard reports	<input type="checkbox"/>
• Relevant query functions that can be run by development staff, without outside assistance	<input type="checkbox"/>
• Battery of existing reports or ability to easily develop reports for:	<input type="checkbox"/>

