

Case Studies: Project Management and Fund Development

Client and Project Management Databases

Many organizations and professional firms need simplified, cost-effective ways to track the status and progress of client relationships, projects and processes. There are many variations on these needs, ranging from a straightforward collection of client or project information to more complex management of factors and decision points.

At the very least, key information is gathered for clients and projects, including demographic and other “static” data. In addition, many organizations must track the status of projects, types of activities, decision processes, due and completion dates, and many other types of information. Sometimes this includes detailed contact management information and status histories.

Finally, the data must be organized in such a way that the user can easily compile subsets of data based on selected dates and criteria, and generate various reports. This data may be used to measure performance against strategic objectives and indicators. Some reports may be for internal progress tracking; others may be for reporting to a board of directors or funding agencies.

Fund Development Databases

Fund development or donor database applications range from very simple to more complex, depending upon the needs of the organization. They provide an efficient and cost-effective way to gather and manage donor and gift information, as well as automated reports that can be generated for specified fund-raising data.

One form displays basic contact info and notes about each donor. Additional forms track detailed information regarding specific gifts or pledges that this particular donor has made. Reports can be run for selected date ranges or types of donations.

Most organizations have unique requirements for such a database, so the basic framework is just the beginning for developing a database to meet very specific needs.

How We Work

We begin with existing frameworks for the core functionality, customizing the database applications to meet your organization’s specific needs for tracking and managing key information. This may be a desktop or local area network application using Microsoft Access and related Office software. Or, it can be developed as a web-based application. Sometimes the best and most practical solution is a combination of platforms, providing some web-based access for viewing and updating data, while also maintaining the more robust analytical and reporting capabilities of a locally deployed database.

In either case, we work closely with our clients to determine the key processes and attributes to be managed, and then build or implement the most cost-effective solutions.