

# Online access To Your Fundraising Data: Choosing the right approach for your organization



Your organization wants to make it convenient for remote users (board members, development staff, volunteers, etc.) to access your organization's fundraising system from home, on the road or in other places outside of your main offices. Internet technology has certainly made it very possible to cost-effectively access needed data (donor contact information, special event details, recent solicitation analysis, etc.) in real time from anywhere in the world.

In fact, there are multiple ways to achieve this type of remote access. It's often difficult for non-technical professionals to fully understand the different technology offered by vendors to achieve remote access. There are important differences in terms of costs, functionality and performance, depending on the technology used. This article is intended to help nonprofit organizations fully understand the distinctions and assist them in selecting the remote solution that best fits their need.

First, let's get some definitions of important terms.

**Application Service Provider (ASP)** – Typically this refers to a company that provides (“hosts”) a software solution that is accessed and used via the Internet. Typically ASP's charge a monthly subscription fee rather than an upfront license fee, but some companies may require you to purchase the software and then charge a monthly or annual “hosting” fee for the technology (computer hardware, services, etc.) to run and manage the software.

**Browser-based software** – We'll use this term to distinguish software where the only software component that must be installed on your computer is a web-browser, such as Internet Explorer, Mozilla, Netscape, etc. In theory, you could use an old computer with just Windows (or Mac OS) and no other software but the browser.

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For more details see [www.pnnonline.org](http://www.pnnonline.org)

**Browser plug-in** – Some software requires you to install a small software component as an add-on to your browser in order for you to use the product. Although this is a small and subtle difference, it can be important to make this distinction since the need for a browser plug-in may mean that the software will only work with a particular browser. This may, for instance, limit your ability to run the software on hand-held devices (like a PDA or phone), Macintosh computers, etc.

**Thin-client** – This is an alternative method of providing remote access to software that was not originally designed to be accessed remotely. Products such as Citrix®, Microsoft Terminal Server®, PCAnywhere®, GotoMyPC, etc., allow so-called “legacy” products to be accessed via the Internet. Rather than transferring data back and forth, the only information that is being processed by the remote computer is the keystrokes, mouse-clicks, and screen views. The term *thin-client* refers to the fact that less data is actually transferred between the “hosting” computer and the remote “client.”

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## Which Approach Is Right For You?

Most vendors will be happy to tell you which technology is best and right for you, and it's the one they sell. Because we offer both a fully browser-based, ASP solution, DonorPerfect Online, and a traditionally installed and networked product, DonorPerfect Visual Edition, we are in the unique position of being able to objectively help you understand the differences and select the product that best meets your needs.

### Characteristics of Browser-based solutions

- **Easy to set up and deploy** – All you need is web access and a browser. There is no need to install software in the main office or on remote machines. This is the reason any computer (PC, Macs, etc.) or hand-held device can be used.
- **Fast Performance** – Since browser-based solutions are designed with remote access being a key feature, they are typically designed to minimize graphics and other screen aspects that can slow down remote access.

## Characteristics of Thin-client solutions

- **Eliminates vendor's development cost.** The software vendor does not need to make the enormous investment required to redevelop their application as a browser-based application.
- **Distributes existing installed software over the web.** The vendor can allow your organization to take existing software and provide remote access to it. This can be particularly advantageous if your organization already has the technology infrastructure for remote access (via Citrix, etc.) or if the need for remote access is very infrequent.
- **In-house control over system** – Since the software and data resides on your internal computers or networks, all responsibility and control resides with your organization.
- **Additional software & staff cost** – Thin client software must be purchased, in addition to the fundraising software, plus additional license fees. Also, IT staff for hardware, software, security, maintenance, etc. is required.
- **Additional investment in hardware/infrastructure** – Many thin client installations require Virtual Private Networks (VPNs) to ensure data security. This can make deployment more costly since additional software must be maintained and installed on all the workstations.
- **Better support for GUI intensive interfaces** – Though the gap is closing, installed software applications tend to employ better use of graphical interfaces.
- **Printing and integration issues** – Many organizations have encountered printing issues while working remotely with thin clients. It's also not uncommon to experience integration issues between different software applications (e.g. problems with simple functions such as copying & pasting text).

## Characteristics of Using an ASP

- **Monthly subscription** – A fee, usually paid monthly, is typically charged based on the number of records you maintain and the number of users that access the data. Subscriptions generally include the software, support, backups, updates, maintenance, and more.
- **Browser-based Solutions** – To maximize the benefits received from a monthly subscription, most ASPs use browser-based solutions as opposed to thin client applications (especially since thin client solutions are usually set up and maintained by an in-house IT department).

- **Security is easy to establish** – Most ASPs use SSL encryption technology to ensure your data can travel the Web securely. And this security is easy to set up since a VPN is not required. In addition, remote users who require access are given a login and password. The administrator determines the level of access (or restriction) each user has to various parts of the system.
- **Focused Resources** – By focusing your resources on raising more money for the nonprofit's mission, you avoid the costly expense of technology issues such as infrastructure requirements, maintenance, upgrades, etc.



*The more often you'll need remote access, the greater advantage ASP offers.*

The more often you'll need remote access, the greater advantage ASP offers. Here are some questions to consider to help you decide:

- How often will you be using remote access?
- How many remote users will there be?
- Do you need to just lookup information or do you want to be able to edit/maintain data? What about being able to run any process that you might want to do in the office?
- Will you always be accessing the information via the same remote computer (e.g. home) or is it important to be able to do it quickly and conveniently from temporary locations (hotels, etc.)?
- Do you want the ability to access from Macs, PDAs, etc.?
- Does your organization have the technical expertise to setup and maintain remote access applications and servers?

## Other Considerations

Some vendors, like SofterWare, offer both installed and online versions of their fundraising products (e.g. DonorPerfect Visual Edition and DonorPerfect Online). And if the nonprofit is large enough, they may be interested in hosting the online version themselves, which some providers now offer as an enterprise solution. Since every nonprofit has unique requirements, it's worth checking out vendors that offer installed, online, or both fundraising solutions to see which best matches their particular needs.

Nonprofits should also note that not all ASP fundraising software providers offer the same robust speed and features. For example, most 'live' sales demonstration systems only contain a few dozen names and addresses. If your organization tracks a large number of

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*Send email to:*

*[checklist@donorperfect.com](mailto:checklist@donorperfect.com)*

**About The Author**

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**About DonorPerfect**

SofterWare has been a leading provider of software solutions to the non-profit community since 1981. Our DonorPerfect and DonorPerfect Online fundraising software is used by thousands of organizations throughout the world.

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constituents, you should ask to see a much larger system in action. In addition, organizations should do a thorough comparison of each vendor’s product features, check references, and ensure that vendors have an established history in the nonprofit market as well as financial stability (many Internet companies still come and go these days.)

**Conclusion**

Nonprofits essentially have two choices when seeking to employ technology that lets their users outside the main office remotely access their fundraising solutions – ASPs or Thin Clients. Both have their advantages, but the trend is certainly toward browser-based software hosted by ASPs, and is being driven by:

- Simplicity of setup and maintenance
- Robust IT infrastructure and security
- Cost-effectiveness of outsourcing
- Better performance and fewer problems with printing, and software/hardware compatibility

For most organizations, the benefits of convenient remote access to fundraising data, increased staff productivity, the ability for participants in fundraising efforts to work with and maintain a single database of constituents and activity make implementing remote access very worthwhile.