

Memo to: Board of Trustees

From: Dorothy Adams, Ken Vogel, Anne Khanna

Date: 6 March, 2015

Re: Upgrade of information systems

This Memo is for informational purposes

Plan: to upgrade to paid subscription software from ACS which will allow for online member access for credit card payments and profile updating. The new system will replace Civi and Pledgetracker.

Process and vendor selection: Four vendors have been evaluated in detail. We have used external software evaluation advisors as well as references from other UU's and other churches. The system we have chosen is Realm, specifically designed for churches and is from ACS, a long-standing vendor (25 years) who serves over 45,000 churches.

Benefits of moving to this system:

- **Online credit card payment capability:** we do not have that with our current systems. We should not be handling credit card details because of the potential for error and the security risks. It is also very inefficient to manually enter card information. With the new system, pledgers and donors will be able to enter card information directly online and manage their contributions themselves. Thus we will avoid these risks, allow for more efficient workflow in the office, and lower the confusion and frustration for pledgers as to where they stand and how to keep credit card payments current.
- With vendor supplied software, **daily support** is available to staff for whenever they have questions and a variety of **training** options are also available.
- By buying from a vendor, we will **reduce dependency on a single volunteer** (Ken) for system functioning which has organizational risks.
- **More accurate and timely information:** members will be able to access their profile or contact information and correct it as needed. They will also have access to their giving history allowing quicker turn-around for tax statements. Because there will be one core database of constituent information, we will reduce the number of separate systems currently storing this and have less syncing across systems.

Challenges:

- It is a tight timetable. We had hoped to have online credit card payment ready in February and that is why there is no other procedure planned for credit card information capture for this year's canvass. This first phase needs to be kept simple and meet our immediate needs so that it can be accomplished on time.

Timeline:

- The migration to the new system will be timed so as to allow online access for members in May, and thus for members to load their credit card information for the 2015-16 pledge year. We are planning adequate time for uploading of data, mostly in electronic files but some will be manually. An initial series of trainings are currently planned for late April-May and special sessions will take place for helping members to initiate and access their profiles. Additional features can be worked on for a phase two next fall/winter.

Cost Impact:

- On an annualized basis, we save on credit card fees so the net annual impact of the subscription is under \$500. In the coming months we expect to make use of the vendor's professional trainer for \$900 which would come out of this year's training budget. We may opt to use the vendor for additional uploading of historical information which would cost \$500.