

Appendix B: Checklist of Membership, Development & Participation System Evaluation Features

Scope

Does the system have modules for membership/development, participation and events management, and retail sales and fulfillment, which match the need of the organization? Does the system have utilities for data entry, retrieval, reporting and security that match the need of the organization?

How complete is each module in comparison to the actual requirement of the museum? What data, functional capabilities and features of each module are relevant to the museum? How relevant are the utilities each application provides? How important to the organization is each relevant aspect on a scale of 1-10?

Once the importance of systems features is defined for the institution, how does each product under consideration rank on each relevant feature on a scale of 0-3? Multiply this result by the weight factors assigned to features, and add the results to get a gross indicator of the relative appropriateness of each product to the institution.

Membership & Development Application Module

Data Model:

Do the data entities in the system include the following, and are the attributes for each adequate to the needs of the museum:

- Client
- Campaign
- Corporate match program
- Donation
- Event
- Foundation
- Grant
- Match
- Membership
- Non-financial gift
- Organization
- Organizational structure
- Pledge

Functional Capabilities:

Maintains Integrated List of all Clients

- Includes user defined categories
- Includes members and donors
- Includes prospects
- Includes researchers, educators, tour guides etc.

Prints Membership Cards

- Cards may have bar-code
- Cards may have magnetic strip encoded data

Supports Bulk Mailings

- Validates Zip + 4

Supports Prospect Matching

- Imports files
- Checks for duplicates by name/address algorithm
- Documents all contacts

Supports Solicitation

- Automatic dialing/redialing
- Online view of full client giving history

Manages Gifts

- Includes grants with reporting requirements
- Includes real estate, stocks and appreciating property
- Includes collection items

Manages Corporate Matching Programs

- Records variable rates of matching
- Prepares invoices and cumulative reports

Manages Pledges

- Variable time & amount pledges
- Audited pledge write-off

Supports Planned Giving

- Alternative minimum tax calculations
- Variable life annuity calculations

52 Functional Requirements

Supports Campaign Management

- Reports against incremental goals

- Reports against user defined volunteer structures

Software Features:

- Unlimited names, any individual/organization

- Unlimited salutations, any individual

- Unlimited addresses, any individual/organization

- Unlimited biographical facts, any individual

- Unlimited contact history, any individual/organization

- Unlimited participation history, any individual

- Unlimited gift history, any individual/organization

- Unlimited member history by category/year

- Maintains client to family relations

- Maintains client to employer relations

- Tickles

- Enforces restrictions on gifts

- Integrated with accrual accounting system

- Integrated with word processing

- Integrated with spreadsheet

- Integrated with project management

Participation & Events Management Application Module

Data Model:

Do the data entities in the system include the following, and are the attributes for each adequate to the needs of the museum:

- Client

- Door

- Event

- Facility

- Group

- Job

- Program

- Promotion

- Schedule

- Staff

- Ticket

- Tour

Functional Capabilities:

Recording and Analysis of Attendance

Automatically from door sensors

Reporting by internal & external doors & time of day

Manages Reservations

Advanced sales, multiple venues and performances

Provides course registration and tour reservation lists

Selling Tickets

On demand and in batch for mailings

Cash or credit card

Supports Visitor Surveys

Through interactive scripts

Supports analysis of the data for future marketing

Manages Volunteers

Maintains skills and experience profiles

Reports hours donated and issues thanks and certificates

Tracks Promotions

Maintains cost of promotion data

Supports tracking of visitors by promotion source

Software Features:

Skills/Needs matching

Volunteer calendars by program or unit

Calendars by volunteer

Schedules volunteers for jobs

Provides volunteer/program work schedules

Tracks volunteer hours

Thanks volunteers for efforts

Accounts for value of volunteer work

Inventorizing skills available

Adjustable, hours-level based awards/notices

Mail merging/notifications

54 Functional Requirements

Sales & Retail Inventory Management Application Module

Data Model:

Do the data entities in the system include the following, and are the attributes for each adequate to the needs of the museum:

- Agent
- Cash Register
- Client
- Inventory Items
- Sale
- Staff

Functional Capabilities:

Maintains Inventory

- Add purchases/subtract sales
- Maintains suppliers database and can reorder

Manages Cash Registers

- Supports credit transactions & calculates member discounts
- Records items purchased and interests against member database

Supports Mail-order Fulfillment

- Maintains customer database within client database
- Supports back-orders, partial orders, & standing orders
- Invoices

Software Features:

- Accepts bar-codes for inventory/register
- Back ordering notification and fulfillment
- Register pricing from inventory database
- Prints descriptive bill of sale
- Automatic calculation of member discounts
- Link to credit card validation
- Generates time based sales statistics
- Calculates commissions due
- Calculates sales taxes due
- Projects inventory needs by item sales rates
- Interface to accounts payable/receivable
- Profit analysis by inventory item
- Can support multiple stores/outlets

Utilities Relevant to Each Application Module

Data Entry Devices:

- Keyboard
- Mouse
- Barcode scanner or magnetic strip reader
- Light "gate" sensing device/turnstile

Data Entry Features:

User Defined Data Entry Screens

- Error messages
- Codes & lookup tables
- Macros & boiler plate text
- Default values

Copying Function

- From previous record
- From previous field
- From specified record

Automatic Entry

- Incremented values
- Calculated values
- Full values from lookup table
- Linked values (e.g., Zip enters city, state, etc.)

Text Entry Features

- Wrap
- Block copy/move/delete
- Font styles

Navigation Features

- Provides view of authorities from data entry
- Provides exit/save of data from any point
- Provides data entry from search mode

Security

- Record level
- Data element level
- Multi-user lockout at record level
- Background date and entry clerk stamp

56 Functional Requirements

Report Writer Features:

- Pre-Defined reports written with report writer
- Pre-defined reports hard coded but user modifiable
- Number of pre-defined reports

New Reports are User Definable

- Any data elements
- Maximum number of data elements in report
- Maximum length of report
- Maximum number of cases
- Maximum number of files crossed

Types of User Formatable Reports

- Tables/columns only
- Page location oriented
- Merged with word processing

Formatting Method

- Drawing (WYSIWYG)
- Report language

Report Features

- Date stamp
- Headers/footers
- Data dictionary defines size, validation, field names
- Data dictionary can be overridden
- Number of levels of sorts permitted

Database Activity

- Report set selected by prior retrieval
- Reporting is security controlled
- Reports are controlled by security of data included in them
- Reports may be saved
- Saved reports retain original security
- Saved reports may be compared

Output

- Report can be viewed on screen
- Report can be sent to user address/peripheral
- Blank fields with labels can be printed
- Item report can include bar-code
- Item report can include image
- Reports can define print sizes, bold and italics
- Reports can include headers and footers

Headers and footers may use auto pagination & date stamps
Arithmetic functions on any field
I/O in Lotus 1-2-3 format
Business graphics (pie charts, bar graphs)
Statistical tests & multi-variate analysis

Security Control:

Level of Control

Security control over application access
Security control over file access
Security control over record access
Security control over element access
Security control over value access
Security control over add function
Security control over delete function
Security control over modify function
Security control over procedures

Security Functions:

Invokes security by individual
Invokes security by terminal
Invokes security user department
Invokes security by type of connection

Security Features:

Security profiles defined by administrator
Password can be changed by user
Password expires automatically
Encryption of data is option

Physical Security

Automatic data back-up
User initiated data back-up
Soft-power down built in
Redundant processors