

**Appendix E: Selected List of Museums with Membership & Development and Ticketing Packages**

The institutions and products in this list have been extracted from references supplied by vendors in 1989 and 1990; the information has not been independently verified.

American Museum of Natural History, NY	Raiser's Edge
American Philosophical Society, PA	Target/1
American Silver Museum, CT	Target/1
Archives of American Art, NY	Raiser's Edge
Aspen Art Museum, CO	Donor II
Barnum Museum, CT	Fund-Master
Bermuda National Gallery	CONTRIB Plus
Boston Museum of Science, MA	Explorer
	Access
Brooklyn Museum, NY	Raiser's Edge
Buffalo Bill Historical Center, WY	Muse
Carter House Science Museum, CA	DonorPerfect
Children's Museum of Indianapolis, IN	Explorer
Children's Museum of San Diego, CA	DonorPerfect
Cincinnati Museum of Art, OH	Fund-Master
	PGM
Cincinnati Zoo and Botanical Garden, OH	BENEFACTOR
Cleveland Children's Museum, OH	ECHO
Columbia Historical Society, DC	Target/1
Colorado University Heritage Center, CO	Westar
Corpus Christi Museum, TX	Target/1
Crafts & Folk Art Museum, CA	Fund-Master
DeCordova Museum, MA	Raiser's Edge
Delaware Art Museum, DE	Raiser's Edge
Des Moines Art Center, IA	Muse
Detroit Institute of Arts, MI	PASS
Exploratorium, CA	Fund-Master
Fraunces Tavern Museum, NY	DonorCore
Flint Art Museum, MI	Target/1
Fort Worth Museum of Science & History, TX	Fund-Master
Haggerty Museum of Art, WI	Fund-Master
Harlem School of the Arts, NY	DonorCore
Historic Hudson Valley, NY	TRIPS
Henry Ford Museum, MI	Raiser's Edge
Holocaust Memorial, DC	Fund-Master
Houston Museum of Natural Science, TX	Explorer
Japanese American National Museum, CA	Fund-Master
Jewish Museum, NY	Fund-Master

Kern County Museum, CA	IDS
La Jolla Museum of Contemporary Art, CA	DonorPerfect
Littleton Historical Museum, CO	Westar
Los Angeles Museum of Contemporary Art, CA	Fund-Master
Los Angeles Co. Museum of Art, CA	Access
Los Angeles Co. Museum of Sci.& Ind., CA	DonorPerfect
Maritime Center at Norwalk, CT	Explorer
Maryland Academy of Sciences, MD	PASS
Metropolitan Museum of Art, NY	TRIPS
Milwaukee Public Museum, WI	Fund-Master
Museum of Modern Art, CA	Fund-Master
Museum of Modern Art, NY	Raiser's Edge
Museum of Photographic Art, CA	DonorPerfect
Museum of Science & Industry, FL	Fund-Master
Museum of York County, SC	Donor II
National Air & Space Museum, DC	PASS
New Jersey State Museum, NJ	Muse
	Raiser's Edge
New-York Historical Society	Fund Raiser
New York U., Grey Art Gallery, NY	DonorCore
Newport Harbor Art Museum, CA	Fund-Master
Pacific Asia Museum, CA	Fund-Master
Peabody Museum of Salem, MA	Fund-Master
San Antonio Museum Association, TX	Target/1
San Diego Museum of Art, CA	Harvest
Santa Barbara Museum of Natural History, CA	Raiser's Edge
Santa Barbara Botanical Garden, CA	Target/1
Science Museum of Minnesota, MN	Explorer
Shaker Museum, NY	Fund-Master
Smithsonian Institution, DC	Raiser's Edge
South Street Seaport Museum, NY	Explorer
J.B.Speed Museum, KY	Fund-Master
St.Louis Art Museum, MO	Fund-Master
St.Louis Science Center, MO	Harvest
The State Museum of Pennsylvania, PA	TRIPS
Textile Museum, DC	Fund-Master
Tucson Museum of Art, AZ	Fund-Master
U.of Rochester Memorial Art Gallery, NY	Raiser's Edge

## 36 Membership, Development & Participation Systems

updating function to be run in batch mode. Purchasers of systems should determine whether they might also need to define new code categories in addition to defining new code values for categories established by the software designer.

It is a considerable advantage for systems, therefore, to provide online, context sensitive help that can be edited by the repository to explain its procedures. However, users should remember that they will need to create specialized on-line help instructions if considerable custom tailoring of the application is permitted, since membership and development activity is, almost by definition, usually assisted by large cadres of volunteers for whom the system will be new each time they use it.

Several functions of membership and development systems are best supported by batch operations. The ability to batch upload mailing lists, census data, retailing demographic statistics, and other files can be of great use in rapidly building and analyzing prospect files. Mass updating is another important batch function and systems that lack the ability to make global changes will create lots of extra work for staff. Some batch reporting functions, such as scheduled mailings compiled and run overnight, are important to conserve the daytime interactive use of the system for applications that require it.

In spite of the fact that data entry and database searching are the primary functions in membership, development and participation systems, the museum will require many printed reports that are unique to it. Buyers should, therefore, look for a built in report writer rather than relying solely upon setting parameters of software vendor designed reports. In evaluating a report writer as part of the membership and development system, the organization will want to consider the number of varieties of output formats supported (columnar/page oriented; portrait/ landscape; statistical/graphic), the number of elements permitted in a report, the number of different physical files that these elements may come from, and the number of sort sequences and complexity of the sort rules. They will want to be certain that the system permits them to save report logic under a user assigned name so that it may be re-executed, and that the system exerts security over the running of reports so that individuals without permission to retrieve data in the reports will not be able to execute them. It needs to save the reports as written, both for audit and archival purposes and in order to manipulate them in a post-processing system, such as a word processing plus typesetting environment.

The nature of membership and development data makes it valuable to the organization and sometimes confidential. Care should be exercised in the system selection process to make sure that the security provided meets the requirements of the organization. Simple password protection over access to the system will usually not be adequate. Most museums will, at the least, want to have passwords govern access by account and program, by function (with view, add, edit, delete) as separate levels of permission, and by some sensitive data elements. It may be necessary to insist, in a large organization with many access points, on record level ownership of data, and it will certainly be necessary to have transaction audit trails for all financial transactions. Because confidential personal information may be recorded in development systems, the ability to write reports should be security controlled

## Inventory Item-price-amount

Job-name  
 Job-description-text  
 Job-begin-date  
 Job-end-date  
 Job-location-text  
 Job-supervisor-name  
 Job-evaluation criteria-text

Match-amount  
 Match-date  
 Match-source-name  
 Match Program-sponsor-name  
 Match Program-limit-amount  
 Match Program-limit-individual-amount  
 Match Program-verification-text  
 Match Program-billing address-group  
 Match Program-billing contact-name  
 Match Program-billing-date

Membership Level-code  
 Membership Level-description-text  
 Membership Level-benefit-text  
 Membership Level-qualification-amount

Non-Financial Gift-description-text  
 Non-Financial Gift-title-text  
 Non-Financial Gift-accession number-code  
 Non-Financial Gift-restriction-text  
 Non-Financial Gift-valuation-amount  
 Non-Financial Gift-valuation-date  
 Non-Financial Gift-appraiser-name  
 Non-Financial Gift-date  
 Non-Financial Gift-source-name

Organization-name  
 Organization-address-group  
 Organization-position-text  
 Organization-position-structure-code  
 Organization-contact-name  
 Organization-sponsor-client-name  
 Organization-sponsor-match-name  
 Organization-sponsor-tour/event-name  
 Organization-source-grant-name

Staff-name  
Staff-skill-text  
Staff-assignment-text  
Staff-schedule-group

Survey-name  
Survey-date  
Survey-id  
Survey-question-id  
Survey-question-type-code  
Survey-question-answer-text

Team-name  
Team-id  
Team-coordinator  
Team-goal  
Team-volunteer-name  
Team-supervisor-name

Ticket-id  
Ticket-date  
Ticket-event-id  
Ticket-event-name  
Ticket-event-date  
Ticket-event-time  
Ticket-seat-id  
Ticket-category-code  
Ticket-discount-code  
Ticket-price-amount

Tour-organizer-name  
Tour-sponsor-name  
Tour-contact-name  
Tour-contact-address-group  
Tour-contact-phone-id  
Tour-billing-name  
Tour-billing-address-group  
Tour-payment-method-code  
Tour-payment-due-amount  
Tour-possible dates-begin-date  
Tour-possible dates-end-date  
Tour-unavailable dates-date  
Tour-meeting place-text  
Tour-lunch-code  
Tour-hours not available-text

**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

**Textual Reports****Accounts:**

Balance sheets, by fund  
 Budgets  
 Cash drawer report  
 Income & Expense statements

**Actions Schedules:**

Action Candidates  
 Action Priorities  
 Advanced ticket sales  
 Contacts to make  
 Gift requests due  
 Gift reports due  
 History:  
   Campaign History  
   Donor History  
   Events History  
   Facilities History  
   Visits

**Cards:**

Membership cards  
 Name tags  
 Place cards  
 Pledge cards  
 Rolodex  
 Self-mailing post cards (reminders, confirmations)

**Contracts:**

Coupons (as part of tickets & published)  
 Gift Agreement terms  
 Pledges

**Forms (page oriented reports):**

Class/Tour Registration  
 Deed of Gift  
 Phone-a-thon record  
 Profile (client, member, donor etc.)  
 Visitor/Event/Exit Survey Form

## 60 Functional Requirements

### **Identification cards:**

Decreasing balance (intelligent magnetic) gift cards  
Membership cards  
Parking permits

### **Journals:**

Cash receipts  
Credit card sales  
Daily gifts

### **Labels:**

Mail labels  
Mailers (envelopes)

### **Letters:**

Invitations  
Reminders (renewal, event, etc.)  
Solicitations  
Thank you letters

### **Lists:**

Client list by type (Donor, Member, Prospect, Volunteer)  
Recognition list  
Registrants list (Class/Tour Roster)

### **Management Summary Reports:**

Audience analysis report  
Campaign progress against incremental goals  
Contributions analysis by appeal, year, fund etc.  
Pledge analysis and maturity reports  
Program evaluation/ survey reports  
Promotions/media effectiveness  
Solicitor effectiveness

### **Notices & Transmittal Forms:**

Bills  
Expect notice  
Gift acknowledgement  
Group tour confirmation  
Invoices  
Renewal notices

## 62 Functional Requirements

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### Graphic Reports

#### **Business Graphics:**

Statistical reports as bar charts, graphs, pie charts

#### **Maps and Plans:**

Events within facility

Membership & participation on regional maps

#### **Timelines and Calendars:**

Calendars as graphic displays of schedules and ticklers

## 64 Functional Requirements

Computer Generated Solutions, Inc. (CGS)  
1250 Broadway  
New York, Ny 10001  
212-564-8085, Phil Friedman  
Tour Reservation Information Processing System (TRIPS)

CSCI  
4351 Garden City Drive, Suite 200  
Landover, MD 20776  
800-426-2724  
CSCI Membership Processing

Dataplus, Inc.  
4545 42nd St. NW, Suite 209  
Washington, DC 20016  
202-244-0842, Marion Ballard  
Advancement Plus

DataTel  
4375 Fair Lakes Court  
Fairfax, Virginia 22033  
703-968-9000, Paul Kaldize  
BENEFACTOR

Delaware Computing  
5700 Kirkwood Highway, Suite 205  
Wilmington, DE 19808  
302-996-0490, Alex Delechambre  
RESERVATIONS; DOMAIN

ECHO Consulting Services, Inc.  
P.O. Box 540  
Center Conway, NH 03813  
800-635-8209  
ECHO Development System

Explorer Technology, Inc.  
6475 Christie Ave., Suite 510  
Emeryville, CA 94607  
415-658-5700, L. Thomas Hehir  
The Explorer System

FRA, Inc.  
120 Montgomery St., #1390  
San Francisco, CA 94104  
415-397-5391, Barbara Marion  
CORE/file; CORE/pack

Impact Systems, Inc.  
83 Cambridge St.  
Burlington, MA 01803  
800-828-3863, Mark Connors  
Fund Raiser

Institution Data Systems, Inc.  
2 Hamilton Ave.  
New Rochelle, NY 10801  
914-632-2332, Sal Forina  
Fund raising module of IDS System 1

John Snow, Inc. (JSI)  
210 Linden St.  
Boston, MA 02111  
800-521-0132, Barbara Cohen  
DONOR\$

Ketchum, Inc.  
Fund Raising Tool Box Division  
5605 MacArthur Blvd., Suite 340  
Irving, TX 75038, Tom Frazier  
Ultimate Development Software-2000 (UDS 2000)

Lasergate Systems, Inc.  
13787 Belcher Road, Suite B4  
Largo, FL 34641  
813-535-8040  
Gatepas

MacTrac  
124 University Ave., Suite 310  
Palo Alto, CA 94301  
415-853-1100, Nancy Szczepanaski  
MacTrac

## 68 Functional Requirements

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Software Research Northwest Inc.  
17710 - 100th Avenue SW  
Vashon Island, WA 98070  
206-463-3030  
Harvest

Software Services  
(Not for Profit Software & Systems Division)  
122 Senatorial Drive  
Wilmington, DE 19807  
302-652-3370, J. Harry Feldman  
CONTRIB Plus; Membership & Statistics

Starkland Systems  
3327 Freeman St., Suite D  
San Diego, CA 92106  
619-277-6468, Robin Stark  
Starkland System

Systems Support Services  
8731 Red Oak Blvd., Suite 140  
Charlotte, NC 28217  
800-548-6708, Georgeanne Bingham  
Donor II

Target/1 Management System  
400 Center Street  
Auburn, ME 04210  
207-786-0195, John C. Gundersdorf  
Target/1 Fundraiser

Travis Software  
229 Ridgewood Dr.  
Ferris, TX 75125  
214-544-3937, Bob Heinonen  
Almost Custom Software

Westar Systems  
907 West Pikes Peak Avenue  
Colorado Springs, CO 80905  
719-473-4387, Richard D. Brenner  
Fund Tracker