"The most functionally complete, fully integrated non-profit management suite available online."

Architecture Overview

Constituent Information

Donor Management

Volunteer Management

Membership Management

Event Management

Campaign Management

Project Management

Grant Management

Payments & Expenses

Asset Management

Board Management

Workshop Scheduling

Document Management

Admin Support Functions

Discussion Forums

Annual Calendars

Meeting Management

Constituent Web Access

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Add-On Functions:

QuickBooks Integration

Performance Evaluations

Facilities Management

Strategic Plan Execution Tracking

Fundamentally Different

What does it do?
In a word - everything. The solution is designed to support your three primary challenges in non-profit management: fundraising (e.g. leveraging donor relationships), program performance and outcomes measurement and improving administrative effectiveness and efficiency.

What does it cost?
Less than alternatives. Our one-time license fee is based on the size of your budget. Our goal is to provide non-profits with the most complete software at the lowest price in the market - even compared to those who say they are "free". You also pay for an affordable subscription to the Quick Base ® platform.

What hardware do I need?
A computer and a standard browser. That's it. The software is an online solution that is hosted by Quick Base.

Can I customize it?
Very easily. Quick Base is a revolutionary platform that enables rapid change without traditional software development.

I don't need all these functions.
That's OK. We can easily add, change or delete modules.

Can I use my existing data?
Yes. We will convert it for you. Typically it's a fairly easy process.

What support do I need?
Not much. We will provide as much as you need, but the solution is designed so that you really can do it yourself. And it's easy.

"Quick Base allows us to use data in a way that tells our story. It is easily customizable, so we can track and emphasize the data that is valuable to us, rather than having to fit into a pre-conceived box.

The data is dynamic; we can see how members are interacting with one another, as opposed to just a chronology of a single member's activities.

Quick Base reports are simple to construct, and the customizable reports and roles allow each user to get the data that is most useful to them. "

Jessica Potish
Member Services/E-Organizer
Network Center for Community Change

QUICK BASE
SOLUTION PROVIDER

Functional Capabilities

Contact Management
- Constituent Details
- Addresses
- Relationships
- Companies
- Additional Bio details
- Ad-hoc messaging

Volunteer Management
- Contact details
- Skills
- Availability
- Assigned activities
- Awards
- Timecards
- Performance
- Volunteer Opportunities
- Volunteer registration

Constituent Web Access
- Board access
- Program Volunteer access
- Employee access
- Event volunteer access
- Consultant access

Class/Workshop Scheduling
- Match participants with classes
- Track availabilities
- Online remote access
- Automated notifications
- Set registration number limits

Performance Management
- Employee Goals setup
- Setup periodic reviews
- Relate goals to strategic plan
- Set performance measures
- Automated review reminders

Ad-hoc databases
- Planned maintenance
- Custom project tracking
- Travel management
- FAQ's
- Disaster Management

*Custom Add-on Functions:
- QuickBooks Integration
- HR Management
- Strategy Execution
- Facilities Management
- Program/Outcomes Management

Donor Management
- Donor qualification
- Cultivation tracking
- Call records
- Campaign tracking
- Contributions
- Bequest tracking

Event Management
- Event details setup
- Committee details
- Assignments
- Task tracking
- Revenue reporting
- Discussion forum

Grant Management
- Grant sources registry
- Proposal process tracking
- Grant due date tickler
- Grant payment tracking
- Link to QuickBooks
- Incoming or outgoing grant tracking

Strategy Execution Tracking*
- Setup Strategic Plan Goals
- Assign ownership
- Log activities/completion
- Reporting on progress
- Issue Tracking/Escalation

Administrative Functions
- Board relations
- Committee assignments
- Board/Officer Assignments
- Meeting management
- Status reporting system
- Annual Calendar
- Document Management
- Employee functions (partial list)
    - Vacation requests
    - Expense forms
    - Emergency contact details
    - Performance reviews
    - Training records
    - Timecards
    - Position history

Program/Outcomes Management*
- Track Participants
- Assign focus Areas and Milestones
- Track progress over time
- Track Families/Households

Membership Management
- Membership categories
- Renewal reminders
- Co-member functions
- Referral details
- Dues Payments

Payments & Expenses
- Setup revenue & expense types
    - Donations
    - Dues
    - Classes/Workshops/Programs
    - Products
    - Memberships
    - Pledges
    - Bequests
- Record payments and links
- Advanced progress reporting
- Link to QuickBooks

Facilities Management*
- Facilities details setup
- Facilities scheduling
- Rental income tracking
- Facilities maintenance

Project Management
- Setup Projects and Tasks
- Assignments
- Reporting on progress
- Issue Tracking/Escalation
- Exception management

Discussion Forums
- Forums include any groups
- Relate to projects or committees
- Online remote access
- Set ad-hoc discussions

Asset Tracking
- Maintain equipment inventory
- Link items to purchase orders
- Track "assigned to" details
- Set maintenance reminders

Document Management
- Organization "Knowledgebase"
- Categorize documents
- Restrict access by permissions
- Track revisions
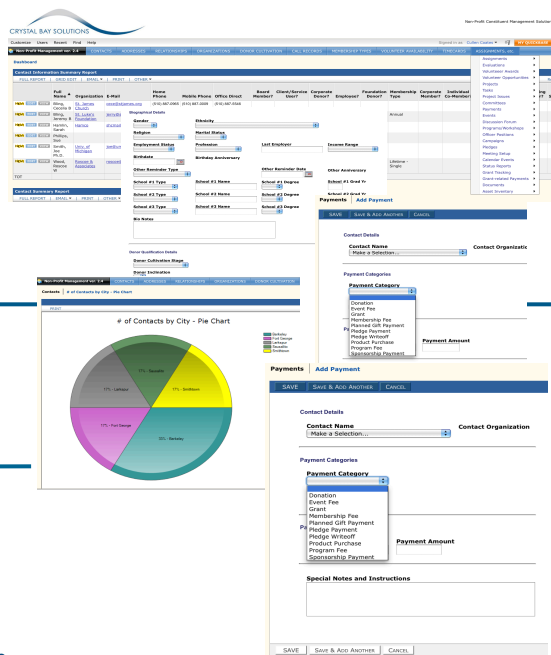
Features, Benefits and Pricing

Features

- Maintain detailed and categorized constituent information.

- Link people through the "Relationships" tool.

- Track progress of all donor solicitation activities against specified targets.

- Qualify donors against custom criteria, and compare giving potential in order to prioritize your solicitation steps.

- Enable Board solicitors to post their own call reports online.

- Create automated reminders, workflows, alerts and reports for your entire team.

- Manage all volunteer activities and include volunteers in the implementation workflows.

- Provide Volunteers, Board and other teams direct access through an internet portal.

- Develop an online, categorized reference library of all your digital documents, contracts correspondence, and collateral.

- Allow trained administrators to modify the system as your business needs change.

- Coordinate Event Management project steps with the team.

- Expand to include management processes such as HR and Program Management in a seamless, expandable solution.

- Create seamless links to your QuickBooks accounting software.

Strategic Benefits

- Comprehensive functionality.

- Simple customization.

- Low initial and ongoing cost.

- Trusted, safe and secure platform.

- Easy training.

- Simple data migration.

- Easy information sharing.

- Online Board support & access.

- Efficient project tracking.

- Focused strategic plan execution.

- Team collaboration system for managing workflow processes.

- Eliminate current "legacy" systems maintenance costs.

- Measurably improve management and team effectiveness and productivity.

Pricing

- A subscription to the Quick Base online platform at low, published "per/user" pricing.

- A one-time application license fee of $5,000 per $ 1 million of your current annual budget with a $750 minimum.

- A separate fixed-price quotation is available for customization, data transfer, training and ongoing support.

- No required annual application maintenance or support fees.

- 4 hours of free consulting included if you activate your Quick Base account through Crystal Bay Solutions.

Quick Base® Software

Crystal Bay software applications are available online through the QuickBase development platform.

QuickBooks® Integration

QuickBase applications can be integrated with QuickBooks so that you can move data seamlessly between the applications.

Some specific examples

Donor and Membership Management

Problem: A large Catholic Parish was using a number of unconnected databases and spreadsheets as well as a large, functionally-specific parish management solution. Parish members were being entered into the multiple solutions, data entry was inefficient and cross-functional reporting was impossible.

Solution: In a relatively short timeframe we created a comprehensive solution to integrate all required activities such as parishioner information, religious education class management, print shop job tracking, online class registration, volunteer tracking and training.

ROI: In addition to dramatic improvements in overall data management efficiency and effectiveness, the parish has estimated that they have saved 2.5 full-time-equivalent positions. In the first year they estimated that productivity savings paid for the entire cost of the system twice over. Management is able to obtain new types of reports very rapidly and employees throughout the parish are using the system in ways not originally anticipated.

Online Member Forms and Strategy Tracking

Problem: A national non-profit trade association needed a member agency database with members able to register and update profiles through their web site. They also wanted an application to track execution of their strategic plan with very few in-person meetings.

Solution: In less than two weeks we created two custom applications, populated the system with existing member data and setup online forms for member registration and profile updates with automated notifications when new records are posted.
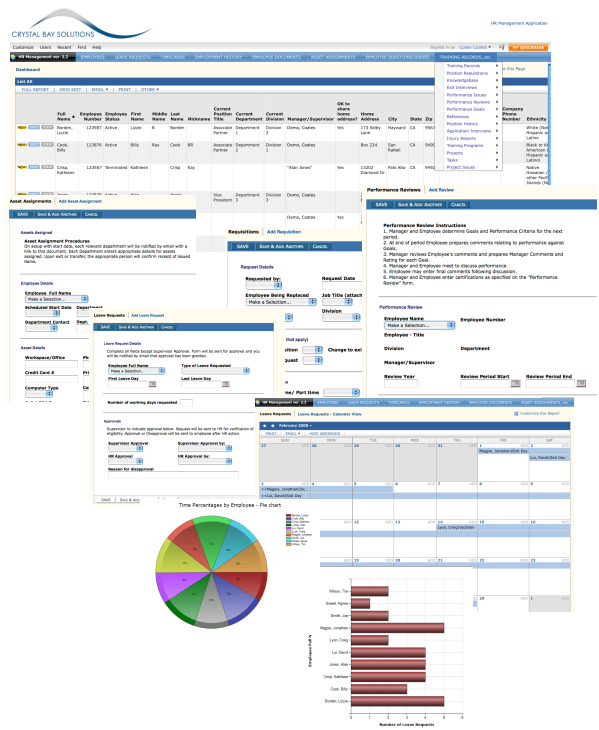
ROI: The organization increased member attendance at annual conventions and was able to reach members rapidly with updates. They were also able to show the industry levels of activity nationally by member agencies, improving "brand" recognition.

Non-profit Program Management

Problem: A national non-profit used a badly-designed Access database to capture and report on program service data. They experienced much wasted time in data entry and difficulty in generating ad-hoc reports.

Solution: In one week we built a replacement system and migrated their historic data from Access. They are able to track and report on program activities and performance outcomes and metrics.

ROI: They estimated savings of 20-30 hours per week for data entry and reporting. This equates to net savings in staff time of .75 full-time-equivalent in headcount. They have avoided staff increases for a cost savings estimated at between $45,000-$60,000 per year.

" Our data management needs had been like herding ducks! But Crystal Bay Solutions and Quick Base were the answer.

We have many stakeholders who all needed to input, update, change and review the data, Quick Base/Crystal Bay Solutions gives us all the tools we need for users of all levels of skills.

It has allowed us to put all of our ducks in a row and to really use our data, instead of not knowing what we had or what to do with that knowledge."

Shannon Nabors
Episcopal Community Services of America

Unique features:
- Actively track all aspects of ongoing processes.
- Full customization, including automated alerts and workflows without programmers.
- Integrates with QuickBooks or other legacy systems.

Technical Overview

Workflow Support

Create seamless internal/external communication processes.

Move information and documents by notifications rather than email.

Focus meetings on "exceptions" and key targeted issues for the group.

Monitor bottlenecks within processes using color-coded reporting and automated, conditional reminders.

Subscribe to reports showing key management issues, required actions, process exceptions and milestones.

Alert Manager

Generate alerts based on:
- field values,
- defined actions, and
- actions not being performed e.g. timesheet submission.

Provide personalized alert messages.

Set reminders on fields based on conditions met or not met.

Send conditional notifications via email, text message or voice.

Security

User and group management.

Granular control with folder, file, field and document level permissions.

User profiles allow for the creation of access control lists.

The Quick Base Platform

That's the best part!

Quick Base supports both Windows and Mac operating systems. All you need is an industry-standard web browser such as IE, Firefox or Safari. You can even access Quick Base applications with your iPhone browser or iPhone app.

Quick Base SaaS Hosted Platform

Scanned business documents

Employee or Constituent online input

Direct link to/from other applications

Index and attach documents:
- Signed copies
- Hiring documents
- Reviews

Management functions
- Constituent information
- Donor qualification
- Donor cultivation tracking
- Volunteer management
- Membership management
- Event management
- Payments processing
- Facilities scheduling
- Program management
- Workshop scheduling
- Agency annual calendar
- Board & committee functions
- Performance reviews
- Etc. Etc.

QuickBooks
QuickBooks Payroll
Other Quick Base Apps:
- HR Management
- Strategy Management
- Project Management

Forms and data input

Automated Workflow Support

Conditional reminders

User-specific report subscriptions

Automated data output to QuickBooks or other accounting software

iPhone Access

Color-coded, conditional reporting

Automated reports

Automated, conditional notifications