A Consumers Guide to Donor Management Systems

October 2013

in partnership with

Nonprofit Technology Network

idealware

npower

bringing the tech community together for social good
Dear Reader,

On behalf of NPower, I am pleased to present the Idealware Consumers Guide to Donor Management Systems, which provides an extensive look at the donor management systems available to nonprofits.

NPower leverages the tech community to enable individuals, nonprofits, and schools to achieve their goals. Through The Community Corps (TCC), NPower's innovative online marketplace, nonprofits can connect with skilled tech volunteers and together create significant social impact.

TCC is free and offers nonprofits and tech volunteers two unique ways to collaborate:

- predefined capacity building projects that address the critical internal tech needs of nonprofits and schools, and
- customized assistance for nonprofits who need volunteers to help deliver tech-related programming.

TCC’s project offerings range from Website Maintenance to Making the Most of Excel to STEM mentoring. In fact, TCC can help your nonprofit make the most of this Idealware report. Nonprofits considering a new donor management system may be interested in our Technology Selection Advisor, Data Cleansing & Transformation, or Strategic Assessment & Planning projects.

NPower understands and appreciates the value of the right technology and the donor management systems discussed in this Idealware report are no exception.

NPower is pleased to be a sponsor of this report and we hope you will take full-advantage of the wealth of information provided within.

Sincerely,

Stephanie Cuskley
Chief Executive Officer
www.npower.org

To learn more about how TCC can help your nonprofit achieve its mission, please visit www.thecommunitycorps.org or contact tcc@npower.org.
# TABLE OF CONTENTS

Authors and Contributors.................................................................................................................. 4
How Was This Report Funded?............................................................................................................. 4

## Consumers Guide to Donor Management Systems

Introduction........................................................................................................................................ 9
What Has Changed?............................................................................................................................. 10
What Types of Systems Are Available?............................................................................................... 11
What Do These Systems Do?................................................................................................................ 13
Recommendations.............................................................................................................................. 22
Recommendation Chart....................................................................................................................... 25
The Top 11......................................................................................................................................... 27
Chart of Recommendations.................................................................................................................. 28
How to Choose................................................................................................................................... 30

## Index of Low Cost Donor Management Systems

Reviews of the Donor Management Systems................................................................................... 48
CiviCRM, by Social Source Foundation.............................................................................................. 49
DonorPerfect Online, by SofterWare.................................................................................................. 57
DonorPro, by TowerCare Technologies............................................................................................... 65
eTapestry, by Blackbaud.................................................................................................................... 73
GiftWorks, a FrontStream Company.................................................................................................... 81
Little Green Light ............................................................................................................................... 89
NeonCRM, by Z2 Systems.................................................................................................................. 97
The Raiser’s Edge(i), by Blackbaud.................................................................................................. 105
Salesforce Nonprofit Starter Pack, by the Salesforce Foundation.................................................... 113
SuiteDonor, by NetSuite................................................................................................................... 121
Talisma Fundraising Online, a Campus Management Solution....................................................... 129

## Appendices

Appendix A: Methodology.................................................................................................................. 138
Appendix B: How We Evaluated the Systems.................................................................................... 140
Appendix C: Authors and Contributors............................................................................................. 147

## Consultant Directory

......................................................................................................................................................... 148
How Was This Report Funded?

Idealware was responsible for all the research and editorial content of this report, which was created without review of those who funded it, including NTEN.

Funding for this report came from two income streams. First, NTEN solicited funding from the vendors included in the 2009 and 2011 versions of this report. (Note that all information about which vendors agreed to fund this report was kept from Idealware and the report’s authors. None of the authors knows what vendors were involved in funding, and neither NTEN nor funding vendors had any editorial input into reviews, summaries or the top 11 list.) While some of these vendors may have received additional NTEN promotion in return for their funding—for instance, an ad in the NTEN eNews or at NTEN’s Nonprofit Technology Conference—none received any consideration of any kind for this report.

Second, consultants and consulting firms who help nonprofits with donor management systems, fundraising, and technology decisions purchased the visible ads and directory listings in this report. All advertiser commitments were made before the report was distributed for review, and none of the advertisers had any control over the text of this report.
WISH YOU HAD FREE ACCESS TO OVER 3,000 TECH EXPERTS?
NOW YOU DO.

Connect with
the communityCORPS
tech volunteers powering social good

www.thecommunitycorps.org
Technology is not only our work.

It’s our mission and our passion.

When it comes to donor management, one size does not fit all. We help identify your needs and find the right solution for your organization.

- Needs requirements
- Software selection
- Salesforce customization
- Outsourced IT
- Cloud migration
- Technology planning

Questions? Let’s talk.
Abigail Goliber • AGoliber@501cTECH.org

www.501cTECH.org

“At SIECUS, information is everything. From advocacy to education, we rely on Sinu’s enterprise-class communication tools and predictable pricing.”

Jason Osher, COO at SIECUS

Affordable all-inclusive IT solutions for nonprofits designed with your organization and its mission in mind.

Sinu. Your IT Department.
GET CONFIDENT ON ALL PLATFORMS

- Planning
- Websites
- Databases
- Integrations
- Support
- Trainings

FivePaths
Your Trusted Technology Partners for Over 10 Years

www.fivepaths.com | 415-326-3483

Experts Working Together

Shared knowledge brings exceptional results. The Connected Cause members combine our cross-industry experience to help nonprofits in these areas:

- System Assessment & Selection
- Design & Development
- Data Management & Business Processes
- Communication & Campaigns
- Integration & Custom Solutions
- Training & Support

Is it time to evaluate your Donor Management System?
Visit us at www.TheConnectedCause.com for the resources and expertise you need to get the most out of your online systems.
Donors are the lifeblood of nonprofit organizations. You need them to survive. But how do you manage all the details about their giving, along with all the personal details that are key to maintaining successful relationships without breaking your bank? In this report, we look at a lot of low cost donor management systems designed to do exactly that.

There are so many systems that it’s a challenge to understand which one is likely to be the best fit.

A donor management system is sometimes called a fundraising system or a donor database. At its most basic level, it’s a system that manages information about donors and gifts so you can understand how much you’ve raised, keep track of all the useful information you know about your donors, manage mailings, emails and campaigns, and print reports on all this information.

There are a huge number of systems available, ranging from the basic to those that offer all sorts of additional features and functionality. Costs vary as well—you’ll even find systems for very limited budgets. There are so many systems, in fact, that the challenge is not so much to find one that might work but to understand which one is likely to be the best fit for your needs. In this report, we look specifically at 36 lower- and mid-tier systems, which we’ve defined as under $10,500 to support one user and fewer than 1,000 records for the first year. This still encompasses a huge number of systems and price points: some were only a few hundred dollars, while others just met the $10,500 cutoff; some are very full-featured, while others are stripped down and simple.

This report is targeted at small-to-medium-sized nonprofits for which fundraising is a priority. The systems we cover apply to a wide range of organizations, from the smallest just getting started all the way up to those with a staff of three-to-five fundraisers. If your staff is larger—especially if you’re doing complex work in a number of different fundraising areas—you may well want to look to the more powerful systems not covered here that cost more than $10,500.

The first step in choosing a software tool, of course, is understanding your own needs. We provide a look at the types of systems available and what they typically do to help you get a sense of what to look for. We then dive in for a closer look at some of the systems from the group that we recommend. Because nearly all of the systems we reviewed are useful in at least some situations, we defined a set of scenarios that cover a number of typical situations likely to apply to nonprofits and recommended the best systems, in our opinion, for each. You may find one or more scenarios that coincide with your organization’s own. Once you’ve narrowed down the field that way, you can cross reference these recommendations against the Index of Donor Management Systems.

Finally, we take a more detailed look at 11 of the systems that, to our minds, had the best combination of functionality, price, and attractiveness in a number of situations. We do an apples-to-apples comparison of features to help you understand what might work for you and what makes each system stand apart from the others.

There are a lot of good products in this market space, and there’s a lot of information about them in this report. Keep your own needs and processes in mind as you read through it. By the time you’ve finished, you’ll be armed with everything you need to know to start finding the right donor management system for your organization.
The donor management landscape has changed since 2011, and we’ve updated the report to reflect those changes—both in terms of systems we reviewed, and how we reviewed them. We improved our evaluation criteria by adding a number of new considerations, such as mobile access to the systems, access for donors to update recurring payments online, reporting dashboards, tracking social media information, and much more.

We also included a number of new systems, including:

- **Affinaquest**, by Affinaquest
- **Akubo CRM**, by Akubo Software, Inc.
- **Sustain**, by Sustain Software
- **Total Community Manager**, by Unger & Associates, LLC.
- **Talisma**, by Campus Management Corporation
- **Causeview**, by Breakeven, Inc
- **FastFund Raising Online by Araize**
- **NonProfitEasy**, by NonProfitEasy

Also new to this report is an in-depth review of The Raiser’s Edge(i), by Blackbaud, which has previously been excluded based on price.

To cast a wider net in the marketplace while still keeping to a manageable number of systems, we adjusted our price threshold from the $4,000 for one user and 500 donors used in the 2011 report to $10,500. Also, to ensure that we were fair to systems with a focus beyond donor management, we excluded those that cater primarily to membership organizations, churches, or synagogues—specifically, systems for whom those audiences comprise more than half the client base—as we can’t do justice in this report to the features of systems geared toward those needs.

In practice, this means we dropped some systems included in the last version of this report, including:

- **DONATION**, by Software4Nonprofits, as its client base was reported in the initial vendor survey as more than 50 percent membership or faith-based organizations.
- **Salsa**, by Salsa Labs, as we were unable to get a response from the vendor in time for inclusion in the report.
- **Income Manager**, by Income Manager, Inc., as it has fewer than 100 clients in the United States.
- **Common Ground CRM**, by Convio, as the system was discontinued after being acquired by Blackbaud.
As you start to consider your options, think through the high-level options before delving into the detail of features.

Do You Need a Donor Management System?

First off, do you need a donor management system at all? Chances are, you do. If you're receiving more than a handful of individual donations, you'll quickly run into problems with lesser solutions. For example, a tool like Microsoft Excel can’t usefully link pieces of information together, so as soon as someone gives more than once, you have a tracking problem. If you have 10 donors who have each given between one- and-five times, the spreadsheet becomes complicated and ugly, making it difficult to figure out your total giving for the year. Add in the fact that two of those donors are married and should only get one mailing, and it’s suddenly completely unmanageable.

Some of the systems we’ll talk about are built specifically to track donors, and have little functionality to support event attendees, volunteers, members, or other constituents. But more and more systems provide functionality to track all these different kinds of constituents in one place. This type of system is often called a Constituent Relationship Management system, or a CRM. CRM isn’t as much a classification of system as it is a philosophy—if you can track all constituent data in one system, that system functions as a CRM for you. But what works for you might fall short for another organization if it has a number of important interactions that aren’t supported.

You might want your donor management system to also function as a CRM by integrating all your data to provide a central view, which is certainly a goal worth considering. In that case, it’s important to look at all your organization’s constituents and all the ways they interact with you; then, evaluate systems based on that view. It’s unlikely that any system will support all of the interactions and constituents of a sizable organization out of the box, but many systems are configurable enough to let you build in reasonable support.

Tracking Donors vs. All Constituents

A number of donor management systems cost just a few hundred of dollars or less, so you can likely find something within your reach. With all the information a system will put within your reach, you may well be able to bring in a bit more money to cover the cost.
This model is quite secure—many banks and hospitals with far greater security needs rely on similar models. Online systems also frequently have stronger support for other online processes, like emailing donors or integrating with your website. You typically pay a monthly or yearly "rent" for the system, which can range from a few hundred dollars per year on up.

As a more traditional option, some donor management systems are purchased up front and installed onto your network and your staff’s computers. Many of these systems are based on the Microsoft Windows operating system, so if your organization uses Macs or another OS, you may have a difficult time finding a compatible installed system. A few of these systems require a dedicated server—literally, a computer that does nothing but run the software—if you’ll have multiple users. Make sure to determine this up front so you can factor that into the cost of the system. With any installed system, you’ll be responsible for software updates and data backups, though some vendors will help you with this for free as part of their support service.

It’s not likely to make sense to build your own donor management system out of Access or Filemaker.

Installed system vendors typically charge a “license” fee to buy the system, which is often based on the number of staff members (also called “users,” “seats,” or “licenses”) you’ll have using the system. After you pay the license fee, you typically are not committed to paying anything else, but most offer service and the ability to get free updates to the system (such as new software releases with improved functionality) for a continuing annual fee. This annual fee, generally somewhere between 5 percent and 25 percent of the initial cost, is usually called a “maintenance fee.”

A few of the vendors who provide installed systems also offer a version of their software that can be accessed online through the use of such remote access technologies as Windows Terminal Server or Citrix Server. This model essentially transforms a system which is traditionally installed into an online hosted model.

Custom-Built Systems

What about building your own system out of Access or Filemaker, or some other technology? Fair warning—it’s very unlikely such a solution would make sense to support donor management needs. Donor management processes are much studied and well-understood, and lots of systems have been built to support them, many of which are very configurable. Building your system means you’ll be the only organization using it; you won’t have any community to discuss issues with, or anyone to provide training. You’ll not only need to pay to create the system initially, but to maintain it, and you’ll never get any upgrades that you don’t pay to build yourself.

If you have needs or processes unique to your organization, you’re probably better off starting with an existing system and customizing it, even extensively, if necessary. Existing systems will have basic functionality—like integrated mail-merging, emailing and standard reports—that would take you days or weeks to build yourself. Look for an extensively customizable system, like a CRM platform (there’s a scenario specifically devoted to that in our Recommendations section), and start there. Tools like Salesforce allow for a large amount of customization without requiring a large amount of technical skills—and several systems we reviewed are actually built on top of that platform already. Or, consider that your processes may be unnecessarily unique. You may be better off changing your processes to meet standard best practices that existing systems are already designed to support.
As you assess your own needs, it can be very helpful to understand the typical features and functions that are available, and how they compare from more basic to more advanced systems.

**Adding and Tracking Donations**

No donor management system would be effective without the ability to easily enter donations. But the systems vary a lot in terms of capabilities in this area, from very basic to sophisticated, so there's a lot to consider.

Among your first concerns is the ease with which you're able to enter gifts into the database. Can you easily search on important fields to see if the donor is already in the database to prevent adding another record for the same one—called a duplicate? Can you easily enter a lot of gifts in one sitting through a quick entry form, ideally, or an upload file?

As you consider the ease of adding gifts, also consider your own process—especially when it comes to reconciling gifts with your accounting system. Some systems require that all gifts be entered as part of a batch (a grouping of gifts for a particular timeframe that can be transferred as a single entity to your accounting system). In these systems, entering one-off gifts may be a little more complicated or time-consuming. Other systems offer little support for batches, which can be a problem if you're used to reconciling that way. Some systems offer a middle ground—like defining batches for gifts you've already entered. The trick is to make sure the system jibes with your process.

The systems also vary in their support for types of gifts. Most support pledges, and let you log when donors promise gifts, but they don't all make it easy to create a pledge schedule, modify it to suit your needs, or to then log gifts against those pledges when the gift is made. Does the system alert you to outstanding pledges, or do you need to track them down yourself?

Consider how the system deals with other gift types. Can you log gifts from a company as opposed to individuals, and separate them out in reporting? Does the system support gifts “in honor of” someone, tribute gifts, stock gifts, in-kind gifts (perhaps entered as a zero dollar donation)? Most systems claim to support each of these things, but their actual functionality varies widely. Every organization’s needs differ. Define what you really need to track for each of these gift types, and see what each system offers for your specific needs.

**Define what you really need to track for each gift type and see what each system offers for your specific needs.**

All systems let you track things like the amount and date of a gift, but can you easily track the gift by a campaign, fund or source, or split the gift in order to associate each piece with different ones? Can you log a “soft credit” for gifts that someone else in the database—say a board member—helped to bring in? Can you enter freeform notes to refer to later? Can you track that part of their gift isn’t tax deductible, because they received a “premium” (a thank you gift, like a T-shirt, that has value)? Make sure the system lets you log and track the gift information that’s important to you.
Managing Donor Information

You can't have gifts without donors, and you can't have a successful donor management system without the ability to easily see and maintain up-to-date donor information. Just logging donors isn't enough to make the most of these relationships.

Can you store all the phone numbers and addresses you need, including seasonal addresses (so mailings follow them to summer or winter homes)? Can you clearly mark when someone should not be contacted at all? What if your donors are on Facebook, Twitter, or other social media? Can you view their status or tweets or message them from within the system? At the very least, can you keep track of what social networks they use? In recognition of the new functionality many vendors in this space offer, we've included Social Media Integration as one of the criteria by which we compare systems.

When a donor calls, can you quickly see their involvement, or do you need to look in 10 different places just to figure out whether you've talked to them before?

To grasp how a system manages relationships, look at how it handles “householding”—tracking multiple people (like a husband and wife) who live together. Some systems make it easy to track information about two different people, but send them combined mailings. Others group all the people in a household into a single record and manage them all together, or let you link separate records to indicate relationships. And some provide only marginally effective (and often complicated) workarounds for householding, such as requiring you to mark one member of the couple as “Do not mail.”

It can also be useful to track other relationships between different donors—for example, siblings or coworkers. Can you track a company or organization, and see the people that work for it? What about your own relationship with donors? Can your staff log all calls and contacts with donors so staff can easily see a full history? It’s also useful to track which staff members know which donors—at least the primary staff member who owns the relationship, if not all staff members with connections.

When a donor calls, can you quickly see their involvement, their giving history, where you got their name, and your record of communicating with them? Do you need to leave the system to access documents related to a donor, or can you attach them directly to the donor record for easy viewing? Is this information well-organized and easy to access, or do you need to look in 10 different places just to figure out whether you’ve talked to them before? Can you easily access it via a smart phone or mobile application?

Information is dynamic. What happens when a donor moves to a new address, changes her phone, or gets a new job? Some systems integrate with outside sources of address and other demographic information to help you keep you donor data as up to date as possible. Unfortunately, donors also die. Systems account for this in myriad ways, ranging from a simple check box to mark a donor as “deceased,” all the way through wizards that walk you through a checklist of all the areas in the system a donor’s death might affect.

These systems tend to track a lot of information about each donor. How they manage and summarize that information can be an important differentiator that makes or breaks a system’s usefulness to your organization.

Prospecting and Proposals

In addition to tracking donors, many organizations want to use all this tracking data to proactively manage fundraising. In some cases, you might want to do this across different members of the development staff (the people who do the actual fundraising). The
systems we reviewed vary widely in their support for this functionality.

Most systems let you assign a status or priority (or both) to each donor. This helps you understand how they fit in with your fundraising action plan—for instance, whether they’re a “sure thing” you should spend a lot of time soliciting, a “lapsed” donor you need to rethink your approach to, or an “unlikely” donor not worth much effort—and then use that information in queries and reports. Many systems will also let you track which staff member is responsible for relationships. These seemingly straightforward fields can be very useful—for example, each staff member could easily generate a list of major donors they should call.

Some more advanced systems go a step further and let you set up complex prospect workflows that define sequential stages and track your donors through them. These workflows can help organize the most appropriate solicitor action for different prospecting stages. Some systems offer sophisticated support for different stages out-of-the-box, while others let you flexibly set up your own workflows. Some let you track dollar amounts for ongoing solicitations and then see a fundraising pipeline forecast. It can also be handy to be able to schedule “ticklers,” or reminders, for yourself or others to do something or call someone on a certain date, or even have the system notify you based on certain thresholds reached or changes in the data. For example, a system might allow you to set up action reminders to staff when a donor reaches $10,000 in annual gifts.

These workflow features are also useful to track grant proposals. Many systems that support this more advanced functionality flesh it out with specific fields to track upcoming proposal deadlines, grant history and the types of areas certain foundations are interested in.

Permissions

It’s also important to think through the division of labor across fundraising tasks, which can translate to different roles in the system. Systems have different levels of support for this functionality. Some let you turn features or fields off for certain users to hide or protect system data, or to provide a more streamlined experience. Others provide the same level of access to everyone. A few don’t support multiple users at all. The more sophisticated systems provide a menu of system functionality and let you define read, update, and delete rights for each module. A few offer even more detailed control and let you define rights for each individual data field.

Mail-Merging Letters

A good donor management system should make it easy to create printed materials, including thank you letters for each gift, solicitation letters, labels, and more.

Some systems provide seamless letter creation and mail-merging while others require you to export data into Microsoft Excel and mail-merge from there.

Some systems provide seamless letter creation and mail-merging while others require you to export data into Microsoft Excel and mail-merge from there.

More advanced systems provide specialized functionality to manage thank you letters—for instance, they’ll let you choose a letter template when entering a gift and then run off the right letters in one shot, with labels to match—but check their support for generating one-off thank you letters, as well. Some systems make you create every letter as part of a batch process, which is less than ideal if you frequently enter and acknowledge one gift at a time.

Most systems let you create your own letter templates, which can include personalized text, mail-merged
data, and custom formats, fonts, and logos. More advanced systems let you merge in conditional text (for example, to include a special greeting to donors who attended a recent event) or custom gift strings (for instance, to solicit 15 percent more from each donor than they gave last year).

Nearly every system will let you use a querying tool to define the group of donors for whom you’d like to print letters, and then create the letters (see the section of this report on querying for more detailed considerations). It can then be useful to be able to review and tweak each individual letter before it is printed—for example, to add a personal note for a specific donor.

It’s also important to consider how the system logs the letter into a donor’s profile once it’s been mailed. Is it logged automatically, or do you need to go through one or more extra step to log it?

**Emailing**

Email can be a fast, effective, and inexpensive way to reach out to constituents. Most systems at least support individual email by storing addresses and letting you send email by clicking on contacts. More and more, however, let you email an entire group at once—for example, to send information about an upcoming event to all donors who have given a particular amount of money.

Some of the more sophisticated systems provide comprehensive broadcast email support, often through substantial integration with specialist tools like Constant Contact or VerticalResponse. Check to see if they support graphical emails or templates. Can you mail-merge donors’ names into the emails? What about more complex data like gift strings (formulas that ask a donor to give, for instance, 25 percent more than their last gift)? Can you schedule an email to be sent in the future? Can you see reports of how many recipients opened or clicked through on your email?

It’s important to check how emails will be sent. Some systems use your organization's email server. This works fine for individual emails or emails to a few dozen people, but is risky if you email thousands of people. On a big list, some people will flag your email as spam no matter how careful you are. If you’re sending through your own email server, these spam complaints will build up over time and more of your email will be send to spam filters instead of inboxes. You also run the risk of having your whole domain blacklisted—meaning none of your organization's email, including email directly from staff members, will go through. It’s not likely, but it does happen, and it can take weeks to get your organization removed from blacklists when it does.

In general, Idealware recommends sending broadcast emails through vendors’ servers, which would mean either choosing a system that allows that or opting for a third party broadcast email tool instead.

**Querying**

Any system should let you generate useful lists of donors and potential donors based on different fields. There are three major components to querying: the ease with which nontechnical staff members can create queries, the flexibility with which you can create the queries you need, and what you can do with the lists once you’ve generated them.

The first two components are nearly opposites of each other. It’s difficult to build a flexible querying tool that’s also easy to use. Some are easy but limit your options, while others are powerful but require sophisticated knowledge of databases and querying language to use them effectively. Some advanced systems do, in fact, succeed relatively well in both areas, though, with flexible querying that is not prohibitive for non-technical users.

As for the third, check to see if you can save queries, or if you can refine saved queries after you’ve gener-
ated a list—and how easy it is to do so. With any tool, make sure you take a look at the querying functionality to judge how well it will meet your needs. Once you generate a list of donors, most systems will let you export them into a file, or make updates across the whole group. Often, this is also where you start to generate mail-merged letters or emails. Some systems merge querying functionality with reporting and ask you to start your reporting process at the same time.

**Reporting**

Unlike queries, reports are typically formatted. They may also include different categories, subtotals, or other informational summaries about anything from fundraising totals by month to comparative statistics for your various campaigns. Most systems come with a number of prepackaged reports, often called “standard” or “canned” reports. These canned reports vary quite a bit in usefulness among the different systems.

Think about what reports your organization needs, and which you’ll regularly use. Comparing fundraising totals over time is common, but what about comparing campaigns to one other, comparing demographic groups, or reporting on your pledge pipeline?

You should also define what “gifts” means to you—for example, whether they include in-kind donations—and make sure the reports support that definition. Rather than comparing the systems’ reporting capabilities against each other, evaluate them against your own needs. A system that offers hundreds of standard reports is no better than one with just a dozen reports that provides everything you need.

From time to time you may want to create your own custom reports. For simple ad hoc reports, it might suffice to be able to export this data to Excel and format it there. But for more complex reports, some systems provide a set of tools that let you define the data you’d like to see, as well as the columns and formatting included in the report. These tools range from the basic, which allow only limited support for customizing reports, to the expansive, which are limited only by your ability to apply them—reporting tools are often complex, and can be confusing to users without experience managing databases. Make sure you have access to all the data that might be useful, including any custom fields you’ve defined. Some tools will even allow you to add charts or graphs based on your data.

Look carefully at each system’s features to judge whether someone on your staff will be able to effectively create reports. Make sure you can save a report format once you’ve invested time in creating it, and then easily find it again, whether through a “favorites” report list or by pulling the report into a frequently used “dashboard” page.

**Payment and Website Integration**

Donor tracking doesn’t exist in a vacuum. As part of your regular donation management procedures, you might also want to accept credit card payments through your system, or integrate the system with your website. The systems we tested vary greatly in whether—and how well—they support these needs.

At the most basic level, check to see if the system even supports processing payments. Can you hook it up to a merchant account—basically, a bank account to collect credit card payments—to charge people’s cards? Can you set up an automatic process for charging cards on a recurring basis? If you’ll be storing donor credit card numbers in the system, or through the vendor, make sure there are strict precautions to protect those numbers. At the very least, numbers need to be encrypted at all times. Ideally, vendors store them on a computer that is not connected to the Internet most of the time.

Some of the systems also support online payments. If so, what kinds of payment forms can you set up—just online donations, or recurring donations,
event registrations, membership dues, or item sales (which typically require online “shopping carts”)? A few systems support distributed fundraising—also called team or peer-to-peer fundraising—with features that let supporters set up their own fundraising pages. Or can you set up a website sign-up form that doesn’t require payment, like an eNewsletter subscription, for example? Can donors manage their own contact and other information from a donor portal?

For any of these, how much can you customize the payment forms to match the colors, style, and navigation of your website?

Another thing to look into is the transaction fees you’ll be required to pay for any credit card processing—you’ll almost always have to pay something. Fees can range from a minimum of about 2.5 percent all the way up to a whopping seven percent or more.

Finally, what happens if someone asks for a refund? Many systems will require you to use a different interface to make a refund, and then log the refund separately into the system.

### Tracking Other Interactions

Donors are not your organization’s only constituents—you may also have volunteers, members, program participants, event attendees, or a wide variety of other people you work with. Chances are, you interact with many of these people in different ways. For example, one person might not just be a donor, but also a volunteer for your food pantry and a youth mentor. It’s important to think through your approach to seeing a full picture of all your interactions with each person.

Many organizations rely on events for fundraising, constituent engagement, outreach, and more. It’s a lot of work organizing and running such events, and it can be helpful if your system supports them—for example, by recording RSVPs and attendance, recording basic information like meal preferences, printing out attendee lists, taking event payments, or even selling assigned seats for a performance.

For galas or dinners, you might also want to be able to track guests against paying attendees, table assignments, or the amount of money raised per table. For workshops or conferences, it’s more important to be able to track registration for different sessions, or to easily generate name tags. Consider what event planning needs your organization is likely to encounter, and make sure the system will support them.

In addition, many of these systems help to manage volunteers—for instance, to track their interests so you can match them with appropriate opportunities, and then track the hours that they put in. Some also provide functionality to track member levels, payments, and expiration dates. Some, in fact, support many different types of interactions, or provide functionality that lets you flexibly build support for your own custom types of interactions.
Some systems allow unlimited new fields, or even let you customize further to support unique constituent interactions.

constituents, and those choices show up in dropdown boxes throughout the system.

But few systems let you move, remove or change the names of the default fields that come with them, and they vary substantially in their ability to let you add new fields. Some permit very little in this area—either you can’t add any new fields, or only a specific limited number. Others allow unlimited new fields, or even let you customize further to allow unique-to-your-organization constituent interactions. Check to see where your new fields will be displayed in the interface—often, they must go into a limited “custom field” area which can become disorganized and awkward if you add a number of fields.

A few systems can be almost completely customized to your needs—either by you or the vendor—with custom fields, labels, interfaces, processes, and functionality. For instance, an open source system lets you access the underlying source code, so an experienced programmer can make changes. This type of wholesale customization can be useful for organizations with unique needs, but it can be expensive to set up and more difficult to support down the road. Make sure the processes you’re trying to support are actually unique, and it’s important that they’re unique. It might be more effective to change your process than to customize a system around it.

Integration

In many cases, you’ll want your donor management system to be able to easily communicate with other systems—for instance, to be able to upload a file of everyone who filled out an online survey, or to dump the list of participants to whom your mailing house should send a catalog.

Whether your system is hosted (Software-As-a-Service) or installed, the donor data contained within it is yours. Being able to extract that data from the system is critical in order to back it up (always a good idea) or migrate it to a new system. Almost all of these systems allow you to freely export data, but it doesn’t hurt to be sure. Most also allow you to easily import, but check if there are additional costs to do so.

If you’re planning to frequently sync up the data between this system and another, manual imports and exports can be time-consuming and error-prone. It could be worth instead investing in hiring a programmer to build an automated connection so data flows from one system to the next without manual intervention.

Whether your system is hosted or installed, the donor data contained within it is yours.

If you want to build an automated connection, check to make sure the system supports it. Is an API provided so your own programmer can access the data? What data can be accessed this way? Is it read-only, or can you write to the database? Check to see if the vendor has to set up integration with external packages for you—often, this process means an extra cost.

Accounting Support

Because donor management systems track incoming money, it’s critical to be able to easily sync them with your accounting system. When considering this, look for two different things—first, what controls and support are provided to make it easy to reconcile donations with your accounting system? Second, what
Ease of Use

Most donor management systems are complex enough that your staff—especially those less comfortable with technology—will benefit more if they’re given training. However, functionality should be relatively easily to learn and remember.

Are fields and functions intuitively named and easy to find? If staff need cheat sheets or guesswork to run basic processes, they’re more likely to opt out of using the system or resort to workarounds.

Good documentation, either printed or online, is also critical.

Systems should also effectively support power users—often, these users are development staff members who spend hours a day in the system. Being able to quickly add gifts, find information, and run the right queries and reports can make a big difference in their efficiency.

Support and Training

Whatever else you need in a donor management system, at some point you’re likely to need customer support. Virtually all reviewed vendors offered solid, basic-level support—phone support, system documentation, and (at the very least) informal training upon request.

In terms of phone support, the difference is likely to be price and quality. How much do you have to pay per incident, or per year? Can existing customers typically reach someone knowledgeable when they call for support?

Good documentation, either printed or online, is also critical. Ideally, information should be available when you need it within the system—for example, to let you see what clicking a button will do before you
When considering a system, consider the vendor, too. Ask some background questions—how long have they been in business? How many clients do they have, and how many staff members? Does the revenue earned from their system cover the personnel and operational expenses required to support it?

You don't want to be forced to select another system next year because the vendor went out of business.

Most of the systems we include in this report have hundreds or thousands of clients. A vendor with a few hundred clients whose revenue covers expenses is likely to be as stable as any other company. Take your own preferences into account when thinking about company size. A small company might provide a more personal feel in their service, while a larger one might have more defined processes around upgrades and issues.
Which of the 36 systems we reviewed are the best? That turns out to be a very complicated question. Most of the systems we looked at had particular strengths, and we could think of a scenario for which almost every system would make sense. That’s great news for organizations looking for a system that meets a specific set of needs, but it makes it very complicated to try to understand the market and sift through the options.

But of course, not every system makes sense for every situation. To help you determine which system best meets your needs, we defined a set of scenarios that cover a number of different typical nonprofit scenarios and recommended the best systems, in our opinion, for each.

Each system may be appropriate for more than one scenario. And more than one scenario might fit your own organization’s situation. Look through them to find the ones that resonate for you.

Note that all these scenarios assume that you need solid donor management functionality—for instance, that you need to track pledges or advanced gift types, and easily generate printed thank you letters. And throughout the report, we’re focusing on systems that cost less than $10,500 in the first year. If your budget or needs differ—for example, if you’re looking for a system that tightly integrates with your website, and you don’t need any substantial fundraising functionality—you’ll find many other systems that might meet your needs as well or better than those recommended here.

Once you’re armed with a list of recommended systems that may best fit your needs, you can learn more about them in our Index of Systems, which is arranged in alphabetical order by system name. You’ll also find a more-detailed look at the 11 systems that, for us, offer the best combination of functionality, price, and attractiveness in a variety of situations. We compare those systems on page 25.

Ready to dive in?

---

**RECOMMENDATIONS**

You just need the basics...

You don’t need to manage a lot of donors or a complex fundraising process—you just need something simple, easy, and functional. You have some donors, and do a little soliciting, but don’t spend much time fundraising and don’t expect it ever to be a huge part of what you do. Events aren’t a big part of your fundraising strategy, and you don’t plan to move people through any specific prospecting process. You have only one or two users, less than a few thousand donors, and you want to pay as little as possible.

- **Akubo CRM**, by Akubo Software, Inc.
- **Basic Funder Premier**, by Jellyware Corporation
- **Donor Tools**, by Higher Pixels, LLC
- **Exceed! Basic**, by Telosa Software, Inc.
- **Little Green Light**, by Bicknell Information Group
- **Sumac**, by Sumac

You’re a tiny but growing organization, and price is critical...

Money is tight, but you want a solid fundraising base that will last as your efforts get more sophisticated. Only one or two people will use the system. You don’t have a lot of donors yet, but you’re actively fundraising and expect more.

- **Akubo CRM**, by Akubo Software, Inc.
- **BasicFunder Premier**, by Jellyware Corporation
- **DonorPerfect Online**, by Softerware
- **DonorSnap.com**, by DonorSnap
- **eTapestry**, by Blackbaud
- **Exceed! Basic**, by Telosa Software
- **FastFund Raising Online**, by Araize
- **NonProfitEasy**, by NonProfitEasy
- **ResultsPlus**, by Metafile Information Systems
- **SuiteDonor (formerly Do Good Better)**, by NetSuite.org
You need something easy to set up and use...

You don’t have any techies on staff, and you want to focus on fundraising, not on technical or configuration matters. You want a solid fundraising system, and price is a factor, but your priority is a low-maintenance system that won’t require a lot of training.

- **BasicFunder Premier**, by Jellyware Corporation
- **DonorCommunity**, by DonorCommunity
- **DonorSnap.com**, by DonorSnap
- **Donor Tools**, by Higher Pixels, LLC
- **FundRaiser Select**, by FundRaiser Software
- **GiftWorks**, by FrontStream Company
- **NonProfitEasy**, by NonProfitEasy
- **Nonprofit Manager**, by Trail Blazer
- **Sumac**, by Sumac
- **Talisma Fundraising Online**, a Campus Management Solution

Fundraising events are a critical part of your process...

You want a donor management system that tracks who comes to your galas, who your table champions are, and how much the event raised. You need a system with solid out-of-the-box support for both fundraising- and events-management; the ability to let people RSVP or buy tickets online would be a big plus.

- **DonorPerfect Online**, Softerware
- **DonorPro**, by TowerCare Technologies
- **Exceed! Premier**, by Telosa Software, Inc.
- **GiftWorks**, a FrontStream Company
- **NeonCRM**, by Z2 Systems, Inc.
- **PatronManager**, by Patron Technology
- **Talisma Fundraising Online**, a Campus Management Solution
- **The Raiser’s Edge(i)**, by Blackbaud
- **Total Info**, by Easy-Ware

You’re pretty tech savvy, and you want a free system...

You have very little money to spend, but you’re willing to spend your own time to get a system up and running and configured to meet your needs. You’ve got someone pretty tech savvy on staff or on call who would find it fun to figure out a database and help you adapt it to your needs.

- **CiviCRM**, by Social Source Foundation
- **Salesforce Nonprofit Starter Pack**, by the Salesforce Foundation
- **SuiteDonor (formerly Do Good Better)**, by NetSuite.org

You want to track all your constituents in one system...

You do substantial fundraising, but you interact with people in other ways as well—not just event registrants, but other types of people like volunteers, program participants, and others—and you want to centralize all that into one system. You want to do it right, and can invest some money or effort if needed.

- **Affinaquest**, by Affinaquest
- **Causeview**, by Breakeven, Inc.
- **CiviCRM**, by Social Source Foundation
- **Click & Pledge**, by Click & Pledge
- **Community Enterprise**, by CitySoft, Inc.
- **DonorPerfect Online**, by Softerware
- **DonorPro**, by TowerCare Technologies
- **The Raiser’s Edge(i)**, by Blackbaud
- **Salesforce Nonprofit Starter Pack**, by the Salesforce Foundation
- **Total Info**, by Easy-Ware Corporation

You need to integrate the system tightly with email and your website...

You do a lot of communications and fundraising online. Any system should be able to talk to your website, automatically pull in online donors, let people sign up for your email list, send out broadcast
emails and, ideally, let people update their own information online... as well as support a reasonably robust fundraising program.

- **CiviCRM**, by Social Source Foundation
- **Community Enterprise**, by CitySoft, Inc.
- **DonorPerfect Online**, by Softerware
- **DonorPro**, by TowerCare Technologies
- **eTapestry**, by Blackbaud
- **NeonCRM**, by Z2 Systems, Inc.
- **The Raiser’s Edge(i)**, by Blackbaud (with Blackbaud NetCommunity or Luminate)

### You need something highly configurable...

Your processes and interactions are truly unique, and the typical functionality offered by most systems won’t meet them. You need something that’s highly configurable—not just a few custom fields here and there, but something that will let you track custom interactions with people and tailor the workflow to your needs.

- **Causeview**, by Breakeven, Inc.
- **CiviCRM**, by Social Source Foundation
- **Click & Pledge**, by Click & Pledge
- **DonorPerfect Online**, by Softerware
- **DonorSnap.com**, by DonorSnap
- **eTapestry**, by Blackbaud
- **Salesforce Nonprofit Starter Pack**, by the Salesforce Foundation
- **SuiteDonor (formerly Do Good Better)**, by NetSuite.org

### You need access on the go...

Your staff members are frequently away from the office and need access online—or even on a smartphone. Ease of access from anywhere in a high quality system is your top priority.

- **DonorPerfect Online**, by Softerware
- **eTapestry**, by Blackbaud
- **NeonCRM**, by Z2 Systems
- **NonProfitEasy**, by NonProfitEasy
- **PatronManager**, by Patron Technology
- **Salesforce Nonprofit Starter Pack**, by the Salesforce Foundation
- **SuiteDonor (formerly Do Good Better)**, by NetSuite.org

### Other good values...

Some of these systems aren’t easily categorized by the scenarios above, but are particularly suited for specific audiences.

- **Abila Fundraising 50**, by Abila (formerly Sage): particularly for those with sophisticated but somewhat-tech-averse fundraising staff
- **The Databank**, by thedatabank: particularly for advocacy groups
- **DenariOnline**, by Synergy Development Systems, Inc.: particularly for missionary and child sponsorship programs
- **Total Community Manager**, by Unger & Associates, LLC: particularly for organizations working with volunteers, or Public Land Trust programs
## RECOMMENDATION CHART

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>You just need the basics</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>You’re a tiny but growing organization, and price is critical</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>You need something easy to set up and use</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Fundraising events are a critical part of your process</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>You’re pretty tech savvy, and you want a free system</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>You want to track all your constituents in one system</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>You need to integrate the system tightly with email and your website</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>You need something highly configurable</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>You need access on the go</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

**Other good values**
### You just need the basics
- You're a tiny but growing organization, and price is critical
- You need something easy to set up and use
- Fundraising events are a critical part of your process
- You’re pretty tech savvy, and you want a free system
- You want to track all your constituents in one system
- You need to integrate the system tightly with email and your website
- You need something highly configurable
- You need access on the go

<table>
<thead>
<tr>
<th></th>
<th>You just need the basics</th>
<th>You're a tiny but growing organization, and price is critical</th>
<th>You need something easy to set up and use</th>
<th>Fundraising events are a critical part of your process</th>
<th>You’re pretty tech savvy, and you want a free system</th>
<th>You want to track all your constituents in one system</th>
<th>You need to integrate the system tightly with email and your website</th>
<th>You need something highly configurable</th>
<th>You need access on the go</th>
<th>Other good values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salesforce Nonprofit Starter Pack, by the Salesforce Foundation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SuiteDonor (formerly Do Good Better), by NetSuite.org</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sumac, by Sumac</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Talisma Fundraising Online, a Campus Management Solution</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Databank, by thedatabank</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Raiser’s Edge(i), by Blackbaud</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Community Manager, by Unger &amp; Associates, LLC</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Info, by Easy-Ware</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nonprofit Manager, by Trail Blazer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
We took a much more detailed look at 11 of these systems that, for us, offer the best combination of functionality, price, and attractiveness in a variety of situations. In selecting them we prioritized functionality to manage complex gift and donor information, issue printed acknowledgement letters, usability, querying and reporting, configurability, managing constituent data beyond donations, prominence in the marketplace, and price.

These aren’t likely to be precisely the best 11 systems for your needs, as every organizations’ needs vary. But they’re ones that are strong in fundraising, and likely to be applicable to wide range of organizations.

We evaluated each of these systems based on a list of 147 criteria. The matrix on the next page summarizes our findings based on a rating scheme (the scheme itself is defined in Appendix B). However, we have much more information. For detailed evaluation for all 11 systems, see the *Reviews of Donor Management Systems*, starting on page 48.

Since the last version of this report, this list has seen a few changes. Of the new systems included in this update, two made the cut: The Raiser’s Edge(i) by Blackbaud and Talisma Fundraising Online. In addition, Little Green Light by the Bicknell Information Group, and the Salesforce Nonprofit Starter Pack by the Salesforce Foundation are also new to our top 11, but not to our report. Total Info by Easy-Ware and Nonprofit Manager by Trailblazer were bumped from the list, and Common Ground, by Convio, which made the top 10 in our last report, was discontinued after Blackbaud purchased the company.

**Near-Misses**

While not in our top 11, these systems are strong contenders worthy of serious consideration:

- **Abila Fundraising 50**, by Abila (formerly Sage)
- **Affinaquest**, by Affinaquest
- **Causeview**, by Breakeven, Inc.
- **DonorSnap.com**, by DonorSnap
- **Nonprofit Manager**, by Trail Blazer
- **PatronManager**, by Patron Technology
- **Sumac**, by Sumac
- **Total Info**, by Easy-Ware
# Chart of Recommendations

<table>
<thead>
<tr>
<th></th>
<th>CivICRM</th>
<th>DonorPerfect Online (Basic)</th>
<th>DonorPerfect Online (Full)</th>
<th>DonorPro</th>
<th>eTapestry (Basic)</th>
<th>eTapestry (Full)</th>
<th>GiftWorks (Basic)</th>
<th>GiftWorks (Full)</th>
<th>Little Green Light</th>
<th>NeonCRM</th>
<th>The Raiser's Edge (Basic)</th>
<th>The Raiser's Edge (Full)</th>
<th>Salesforce Nonprofit Starter pack (without apps)</th>
<th>Salesforce Nonprofit Starter pack (with apps)</th>
<th>SuiteDonor</th>
<th>Talisma Fundraising Online (Basic)</th>
<th>Talisma Fundraising Online (Full)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adding and Tracking Donations</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td></td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
</tr>
<tr>
<td>Managing Donor Information</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td></td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
</tr>
<tr>
<td>Social Media Integration</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td></td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
</tr>
<tr>
<td>Prospecting and Proposals</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td></td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
</tr>
<tr>
<td>Permissions</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td></td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
</tr>
<tr>
<td>Mail-Merging Letters</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td></td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
</tr>
<tr>
<td>Emailing</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td></td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
</tr>
<tr>
<td>Querying</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td></td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
</tr>
<tr>
<td>Reporting</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td></td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
</tr>
<tr>
<td>Payment and Website Integration</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td></td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
</tr>
<tr>
<td>Tracking Events</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td></td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
</tr>
<tr>
<td>Tracking Other Built-in Interactions</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td></td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
</tr>
<tr>
<td>Customization</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td></td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
</tr>
<tr>
<td>Integration</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td></td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
</tr>
<tr>
<td>Accounting Support</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td></td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
</tr>
<tr>
<td>Ease of Use</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td></td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
</tr>
<tr>
<td>Support and Training</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td></td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
</tr>
<tr>
<td>Installation and Maintenance*</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td></td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
</tr>
<tr>
<td>Product Background</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td></td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Excellent</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
<td>Fair</td>
</tr>
</tbody>
</table>

Basic refers to the cheapest version of the system you can buy. Full to the version with all upgrades and modules that have an impact on this review.

• None ○ Fair ○ Good ○ Excellent

* Rating depends on whether you purchase the hosted or installed option.
# Pricing Comparison

This matrix summarizes the list cost for each of our top 11 systems. Note that some vendors routinely discount from the list cost, particularly if you’re buying a number of extra modules or consulting services. It’s always worth getting an estimate directly from the vendor.

<table>
<thead>
<tr>
<th>System</th>
<th>One User; 1,000 Donors</th>
<th>Three Users; 20,000 Donors</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>First Year</td>
<td>Yearly Ongoing + Email Support</td>
</tr>
<tr>
<td>CiviCRM¹</td>
<td>$ –</td>
<td>n/a⁴</td>
</tr>
<tr>
<td>DonorPerfect Online (Basic)</td>
<td>$1,031</td>
<td>$936</td>
</tr>
<tr>
<td>DonorPerfect Online (Full)</td>
<td>$4,991</td>
<td>$3,996</td>
</tr>
<tr>
<td>DonorPro</td>
<td>$2,165</td>
<td>$2,165</td>
</tr>
<tr>
<td>eTapestry (Basic)</td>
<td>$1,188</td>
<td>$1,188</td>
</tr>
<tr>
<td>eTapestry (Full)</td>
<td>$2,844</td>
<td>$2,844</td>
</tr>
<tr>
<td>GiftWorks (Basic)</td>
<td>$1,579</td>
<td>$1,080</td>
</tr>
<tr>
<td>GiftWorks (Full)</td>
<td>$1,759</td>
<td>$1,260</td>
</tr>
<tr>
<td>Little Green Light</td>
<td>$468</td>
<td>$468</td>
</tr>
<tr>
<td>NeonCRM</td>
<td>$600</td>
<td>$600</td>
</tr>
<tr>
<td>The Raiser's Edge(i) (Basic)</td>
<td>$10,050</td>
<td>$3,000</td>
</tr>
<tr>
<td>The Raiser's Edge(i) (Full)²</td>
<td>$29,750</td>
<td>$8,000</td>
</tr>
<tr>
<td>Salesforce Nonprofit Starter Pack (without apps)¹</td>
<td>$ –</td>
<td>n/a⁴</td>
</tr>
<tr>
<td>Salesforce Nonprofit Starter Pack (with apps)³</td>
<td>$2,225</td>
<td>$2,225</td>
</tr>
<tr>
<td>SuiteDonor1</td>
<td>$ –</td>
<td>$ –</td>
</tr>
<tr>
<td>Talisma Fundraising Installed (Basic)</td>
<td>$2,495</td>
<td>$624</td>
</tr>
<tr>
<td>Talisma Fundraising Installed (Full)</td>
<td>$10,370</td>
<td>$624</td>
</tr>
<tr>
<td>Talisma Fundraising Online (Basic)</td>
<td>$6,672</td>
<td>$1,872</td>
</tr>
<tr>
<td>Talisma Fundraising Online (Full)³</td>
<td>$14,547</td>
<td>$1,872</td>
</tr>
</tbody>
</table>

¹ There’s no license fee for this product. It is offered for free from the vendor.

² Includes NetCommunity, Membership module, Events module, Volunteers module.

³ Estimated costs a user could see with functionality from the AppExchange. Radian6 and WealthEngine don’t publish their pricing.

⁴ Pricing for support will vary depending on the consulting firm that provides this service.
HOW TO CHOOSE

Even if you don’t have a lot of money to spend, you’ll find a lot of different donor management software packages available to you. It’s good to have that much choice, but making a decision can be difficult. What’s more, switching systems is a time-consuming process, so it’s important to think your needs through carefully up front and make a choice that will last.

How should you narrow down the choices and focus on the packages likely to work best for you? Here are a few tips:

Don’t over-prioritize price.

First off, don’t let minor differences in price be a big factor in your decision-making. Saving money is important to every nonprofit, but a few hundred dollars shouldn’t dictate your fundraising future. Instead, focus on the time you’ll save by using a more efficient system—simply being able to more easily print customized letters and send emails can save a lot of time. And better communications, more information about your donors and campaigns, and more support for effective prospecting—paired, of course, with an effective fundraising strategy—can help bring in thousands of dollars more a year even for small organizations. Which means the system pays for itself over time. While some of the systems in this report have a significant, but one-time, licensing cost, others are Software-as-a-Service (SaaS), meaning that you pay a smaller, monthly or yearly fee to use the system. The subscription model is likely to cost more in the long-term, but doesn’t require a significant up-front investment. With SaaS systems, technical support and maintenance are provided by the vendor, and included in the subscription costs.

Make a plan for all your constituents and interactions.

Donors are just one piece of the puzzle. Think through all the people your organization interacts with on a day-to-day basis—and all the ways you interact with them, both online and off. Then make a plan for how you’ll track data about them. Ideally, you’d be able to see an all-in-one-place overview of everything a person does with your organization. This might mean tracking all the data in one system, or being able to integrate data from multiple systems together. But don’t purchase a donor management system without understanding how it will fit into the larger picture.

Understand your own donor processes.

Some organizations use very specific fundraising processes. Others are more experimental. It’s important to understand how you work in order to assess a system’s fit. Do you want to be able to move prospects carefully through a series of stages and priorities? Is it important to be able to flexibly query to find any set of potential prospects under the sun? Do you need a lot of prepackaged reports, or would you rather be able to create your own? There are lots of good systems, but better understanding your own needs can help you find the system that’s best-suited to you.

Identify your communication priorities.

The systems vary considerably in their support for creating mail-merged letters and sending email. Some are only really good at one of these. Others fare poorly
at both. Think through your needs in this area and determine what's important to you. Support for broadcast email is becoming increasingly common, especially among hosted systems—some of which have integrations with mass mailing specialists like VerticalResponse and Constant Contact.

Estimate your numbers now—and in the future.

How many donors do you plan to store in the system? How many staff members will be using it, now and three years from now? The cost structures vary a lot between different systems, so one that is cheap now might not be if you double your number of donors. One that's a bit of stretch now could turn into a wise investment if it easily scales to support many more donors and users with little extra cost.

You'll certainly want to take a careful look at the systems yourself before making a final decision.

Weigh flexibility vs. complexity.

It can be tempting to prioritize a system that allows you to continue to work in exactly the way you always have—and the flexibility to add custom fields and custom interactions can be useful. But often, a new system provides a great opportunity to rationalize and streamline your process, and potentially bring it closer to existing best practices. If you can map your process to standard practices, you'll likely be able to use a cheaper and less complex system.

Consider the priority of accounting controls.

Some of the systems offer very little in the way of features to reconcile your gifts with your accounting systems. Others require you to consider accounting batches, or even accounting funds, every time anyone enters a gift. Some offer a mix, or can be set up how you want. What will work best for you?

Hopefully, the information in this report will help you understand what's available and narrow your search to a handful of options. You'll certainly want to take a careful look at those systems yourself before making a final decision, though. Think through your needs carefully—which of the features described here are critical for you? Which are only nice to have, or not useful for your organization? What other features, which aren't discussed here, might be useful?

With that list of important features in hand, contact the vendors and ask for demos. Ask them to show you exactly the features you consider important. Consider giving them a script which walks through the tasks you'd like to see demonstrated—for example, "I add a gift to the system, and then create a thank you letter." This can be very useful to help compare different systems to each other.

Study the system carefully—does it seem like something your staff can, and will, use? Does it mesh well with the type of fundraising you do? If it feels like the system or the vendor just doesn't "get it," that's an important sign that the system isn't the right fit for you.

Each available option has its own strengths and weaknesses. It doesn't matter how good a particular system is if it doesn't fit your organization's needs. Regardless of what we say in this report, it's critical to take a look for yourself, and make your own decision.
INDEX OF LOW COST DONOR MANAGEMENT SYSTEMS
INDEX OF DONOR MANAGEMENT SYSTEMS

Now that you’ve read through our thoughts and recommendations about the systems, it’s time to dive down into more detail. This section provides short Idealware reviews of each of the systems included in this report. They’re arranged in alphabetical order by system name. For 11 of these systems, there’s even more detail—see Reviews of the Donor Management Systems beginning on page 48 for a detailed review of each.

Abila Fundraising 50, by Abila, Inc. (Formerly Sage)

Installed on PC desktops or Online hosted system

Abila Fundraising 50 has a unique interface designed to look like an index card. It’s quite clean and usable, with friendly support even for complex functionality like querying, and is likely to appeal to less technologically savvy users. It’s rather strong in gift, pledge, and donor tracking functionality, and also provides support for events, volunteers, and membership data, all for the base price. Mail-merged letters, email, reporting, and online payment functionality are all solid. The system supports custom fields, but these fields can only reside on specific custom field screens. Abila Fundraising 50 handles broadcast email through the client’s email server and provides no delivery reports. Abila Fundraising 50 integrates with Abila Fundraising Online for Internet fundraising, as well as Sage eMarketing. The system is available on either a perpetual, owned license or a subscription basis. Perpetual, owned pricing starts at $3,400 for a single user and unlimited donor records. Yearly maintenance and support is 25 percent of the license cost. Subscription pricing starts at $1,200 per user, per year.

Affinaquest, by Affinaquest

Online hosted system

Affinaquest is a donor management system based on the Salesforce CRM platform, and is notably higher-end than some of the other implementations on that platform reviewed elsewhere this report. Developed by a member of the team who designed the system that later became Sage Fundraising 50, the system focuses on making the Salesforce infrastructure serve complex fundraising needs, without some of the add-ons that other systems are packaged with out of the box. The philosophy of Affinaquest is that an organization can supplement the software’s strong donor management capabilities by paying for other specialized tools on the Salesforce App Exchange, like Conga Merge for mail merges and 2Dialog or Soapbox Engage for online donations and event management, although the vendors are beginning to add more features and direct integrations to Affinaquest itself. The user interface is standard Salesforce, but Affinaquest’s gift and pledge functionality are custom objects, rather than built upon the Opportunities module as most other donor management systems. Opportunities is kept for major gift solicitation. The system has very sophisticated gift, pledge, campaign management, batch entry, and querying abilities. It’s highly customizable, and based around donor management best practices. Broadcast email and accounting integration are absent from the base product, however, so a nonprofit would need to use external services for those functions. In all, Affinaquest is an excellent option for organizations looking to leverage the power of Salesforce for advanced fundraising needs, and who don’t mind supplementing their donor management system with external apps. For nonprofits with fewer than 20,000 donor records, Affinaquest costs $3,600 per year for unlimited users, and support is included.
Akubo CRM, by Akubo Software, Inc.

Online hosted system

Akubo provides a basic, straightforward donor management solution suitable for smaller nonprofits. The interface isn’t as polished as others in this report, but most functions and actions are easily accessible. Adding a donation or pledge is a relatively straightforward process of finding a donor and adding the payment or pledge to the record; there is also a quick entry interface for adding donations directly from the main screen. Akubo has fairly strong abilities for generating emails and letters—the user can create one-off thank you letters and emails in the same straightforward process from the donation screen, and both individual and bulk emails are sent through the vendor’s servers, potentially protecting your organization from blacklisting issues. The system has useful querying and search capabilities, but otherwise lacks a real ad hoc reporting feature, and can’t easily track volunteers, event attendees, or other non-donor constituents outside of creating a new activity type in the “Activity Log,” which can be included in queries or reports. Pricing starts at $99 per year for one user and 1,000 donor records, and up to $499 per year for 10 users and 10,000 donor records.

BasicFunder Premier, by Jellyware Corporation

Installed on PC desktops

At $349 for as many users as you like, BasicFunder Premier offers a nice set of basic features. It tracks pledges and volunteer hours as well as simple donations, and will automatically log and charge recurring donations. It provides a simple but useful internal word processor for creating mail-merged letters, and allows for HTML-formatted mass email. The system supports the use of email templates, and sends email through the client’s email servers; the latter limits broadcast emailing to the restrictions of the user’s ISP and potentially exposes them to the risk of blacklisting. Reporting features are solid, with a number of canned reports with simple date range options, an ad hoc pivot-type-table report builder, and a list-builder to create queries and define what fields you want to see for them. Addresses and relationships have improved since we last reviewed this system. In addition to a donor’s primary household address, you can now track seasonal addresses, and the system will automatically select which address to mail. Users can now define relationships by linking a donor to another profile in the system, but you must manually record relationships with people who are outside of the database. Users are able to define multiple relationship types—like spouse, employer/employee, son, daughter, etc.—but can only view all of a donor’s relationships through the Donor Link screen. It’s also not easy to view an interactive summary of donor information within the system, as you must move to different tabs to see contact information, giving history, or other interactions, but you can easily generate a summary to print from the donor’s record. All in all, it provides a limited but useful set of features at a reasonable price. Several updates have been made to this system since our 2011 report.

Causeview, by Breakeven, Inc.

Online hosted system

Causeview is a donor management system built upon the Salesforce CRM platform from Breakeven Inc., a Canadian software company that provides cloud solutions for nonprofit organizations. Salesforce’s quick-search function remains an integral part of the software. Rather than use Salesforce’s built-in Opportunities module to track and manage donations, Causeview reserves the use of Opportunities to manage major gift and grant prospects through the opportunity pipeline. To handle financial transactions, Causeview has built a custom Transactions object, which handles one-off gifts, pledges, recurring donations, event registrations, and purchases. Causeview also has a helpful batch entry mode and includes some nice functionality around major giving, as well as moves management to help usher donors to higher levels of giving. Householding is robust, and searches against existing individuals before adding new household members to minimize duplicates in the system. Causeview is built to integrate directly with payments, and is fully PCI compliant when it comes to online donations. You can configure the system to automatically send a thank-you letter from one of the unlimited, flexible templates after a one-off donation. Like many
other systems based on Salesforce, you need to use external apps for mail merging and broadcast email. Querying out of the box is standard Salesforce interface, and for now there's no built-in integration with an accounting system. Causeview comes loaded with standard reports and dashboards to make a fundraiser’s life easier, and also has a robust new volunteer management module. Causeview requires a minimum of three user licenses, which cost $1,440 per year ($480 per user), with additional fees for each of the available web portals (for donors, events, and volunteers), and if an organization uses the system as its payment processing. Additional users are $480 each per year and enhanced support can cost up to an additional $4,500.

CiviCRM, by Social Source Foundation

Installed on your own web server

This free and open source online system offers basic functionality for donations, as well as a number of other constituent interactions. It’s straightforward to add a donation, and to receipt it via email. The system has support for a number of different interactions, including a strong event module, and you can see a useful summary of each constituent’s relationships and activities. CiviCRM comes with a selection of standard donor reports and allows you to easily include charts and graphs in your reports. Users looking for automation for workflows and reminders will need to set up CiviCase, a case management system integrated with CiviCRM. There is tight integration with common website content management systems like Drupal, Joomla!, and WordPress, and with online payment and form-building functionality. Since the last report, CiviCRM has added the ability to batch donations for integration with QuickBooks or other accounting systems. You'll need someone familiar with installing and configuring open source systems on a web server in order to get you up and running. Several third-party providers offer turnkey hosted installations of the product. Since CiviCRM is open source, the community provides add-ons to enhance its functionality, or with the help of a skilled programmer, you can build just about anything you want. There have been significant updates to this system since our 2011 report. See Reviews of the Donor Management Systems for an in depth review of this system.

Click & Pledge, by Click & Pledge

Online hosted system

Building on the Salesforce platform, Click & Pledge will appeal to organizations that need a donor management solution coupled with the ability to sell products or solicit and process donations online. The vendor has now introduced a physical payment processing tool, Swiper1, which can take mobile payments at events or on-site. The interface for processing online payments and donations is polished and can be branded to the look and feel of your organization’s website. Click & Pledge can process payments and donations via credit card and eCheck. It also adds an enhanced transaction history to donor profiles, and has a new event management module. The vendors have also done substantial work with the Salesforce reporting functionality, including supplying some standard reports and providing a different underlying reporting infrastructure. Much of the implementation, however, is standard Salesforce Non Profit Starter Pack, with all of that platform’s strengths and weaknesses—including a lack of accounting functionality, although that is planned for a future release. While the software itself is free, Click & Pledge charges a monthly fee for merchant bank services. Click & Pledge offers two fee plans, ranging from $240 per year plus three percent and $0.30 per credit card transaction to $600 per year plus 2.75 percent and $0.25 per transaction (with slightly lower percent and charges for eChecks). The plans include email support, while phone support starts at $150 per hour. There have been major updates to this system since our 2011 report. These changes were outside the scope of our review criteria.
Community Enterprise, by CitySoft, Inc.

Online hosted system
Community Enterprise is a highly integrated package with support for a broad range of areas—including donor management, events, membership management, and website content management. The donor management component is fairly basic—the process to enter a gift is straightforward, but there’s not much support for alerting users to a pledge. To mark a batch of thank you letters as sent, you need to run a report. There are several pre-built donor reports and a fairly advanced query tool allows you to find a list of donors, email them, or export data to Excel. Email is straightforward, and users have the ability to create and customize flexible templates for both individual and broadcast emails, but there is no built-in mail-merge for print letters. The system has the ability to import gifts in bulk from a spreadsheet or add them one at a time through the quick donation entry interface. CitySoft has strong event- and member-management functionality, and could be a good fit for those with lighter donation needs looking to support online communities, track membership data, and manage events. Nonprofits with annual budgets of $500,000 or less can receive a free version of the CitySoft code through TechSoup, and host it with CitySoft for $75 a month. For larger nonprofits, the hosted version of the software starts at $250 a month, or $3,000 per year, plus implementation and setup costs. A free open source release is planned for 2014. The system is updated continually. However, many of these changes were outside the scope of our review criteria.

The Databank, by thedatabank

Online hosted system
The Databank provides a standard feature-set with modules to manage donations, volunteers, advocacy, voters, and more—which it will then customize with the appropriate fields and reports to meet each client’s needs. Querying is rather strong, and users can save their frequently used searches, but may be slowed down navigating through a number of options. There’s a great centralized history of each constituent’s history with the organization, and a useful quick search on every page. An advanced querying tool allows you to generate a list of people to contact, and then email them or create a mail-merged letter. The vendor offers both prepackaged reports and customizable “roster” reports—all reports are displayed in a matrix format that provides a basic look but good information. The strong internal broadcast email client will be attractive to many organizations, and fundraisers will likely appreciate the dynamic graphs and reports available on the user dashboard, new to the system since the 2011 report. The system, with the Fundraising module included, starts at $2,475 per year for one user and under 5,000 donor records. A $275 initial setup fee includes customization of fields; custom reports are extra. Support and training are included. Small updates have been made to this system since our 2011 report.

DenariOnline, by Synergy Development Systems, Inc.

Online hosted system
DenariOnline is a strong system that’s fully featured around gift entry, with the ability to easily apply gifts to pledges and to split gifts across multiple designations. The workflow is geared to those who want tight accounting controls—all gifts must be entered into a batch, and thank you letters cannot be created until the batch is posted. It’s fairly easy to view donor information, giving history, or contact history, but navigation for novice users can be hampered by the naming conventions (e.g. donor information is under “Name List Management”). There’s a fully built-in email and text editor, with templates and mail-merging, or integration with ConstantContact, currently in Beta. The querying tool has powerful parameter features, and a more intuitive interface than the one we last saw. Standard reports are strong once you’ve figured out the right queries, with a number of both summary reports and more detailed views. Ad hoc reporting has also been added to the system, offering technically minded users lots of parametric control. Beyond just donor management, it offers unusual modules to support ministries, such as features to support missionary work, child sponsorship, and radio “-athon” events, as well as an online donation module that’s fully PCI-compliant. DenariOnline has traditionally been marketed to Christian ministries and organizations, but the
vendor reports that they are interested in expanding their client base to non-religiously affiliated organizations, and recently took on a public radio station. Pricing starts at $588 per year ($49 per month) for the base system, with one user and up to 500 donor records, and at $1500 per year ($125 per month) for the complete system, with unlimited users and donor records and all modules. All plans include unlimited support.

**DonorCommunity, by DonorCommunity**

**Online hosted system**

DonorCommunity is a web-based system popular in the child welfare services community, among others. It combines content management of an organization’s website and e-marketing communications with a basic database of donors and other constituents. The back end of the system is managed by a sign-in function on a nonprofit’s public-facing website. The user interface is clean and accessible, and it’s easy to search for a donor. However, the system lacks a built-in means of accommodating householding, and it’s missing some functionality important to fundraisers, such as the ability to tailor a pledge schedule. Users can set reminders for outstanding pledges through the “Tasks” section. Online giving is seamlessly integrated into the database, and gifts given online automatically show up in a donor’s giving profile. The system has strong capability with its built-in broadcast email functionality; queries of donors are built and saved as “mailing lists” in order to send out communications. There are some useful standard reports that come with the system, but, at the time of this review, no clear way of assembling ad hoc reports. The vendor has since added this functionality. There’s currently no direct integration with an external accounting system, and rather than providing users with the ability to create custom fields in the system, DonorCommunity provides unlimited user-defined tags. DonorCommunity’s pricing reflects its functionality as a comprehensive content management and marketing system, and includes unlimited users, donor records, and support. A nonprofit that doesn’t need the events module could pay $3,600 per year, but a nonprofit that wants the full functionality of the product could expect to pay $7,200 per year, with additional upfront fees for website customization and implementation ranging from $500 to $4,000.

**DonorPerfect Online, by Softerware**

**Online hosted system**

SofterWare still offers an installed version of DonorPerfect, but is encouraging new clients to move to its hosted system, DonorPerfect Online. We looked only at the online hosted version for this report. DonorPerfect has as strong functionality as any system we reviewed in gift- and donor-tracking, prospecting, and support for accounting needs, and has a user-friendly interface that belies its significant power. The system is very configurable to meet specific processes, including custom fields, custom interactions, and the ability to delete or rename fields that aren’t helpful to you. DonorPerfect Online provides useful mail merge functionality, querying, and reporting. Broadcast email is handled through a strong integration with Constant Contact—organizations need to pay the subscription fee for the email service as well. The WebLink module is now included in the system, and provides strong online payment functionality, while the optional WebLink Pro allows users to add custom fields to online forms at additional cost. DonorPerfect supports volunteers and members and includes some events functionality—there’s also a new, free mobile app for users of the system. Pricing for DonorPerfect Online ranges from about $800 in the first year for one user license for the Express tier (which doesn’t include live telephone, email, or chat support) of the system with 1,000 records or less, up to about $5,379 in the first year for unlimited users, premium technical support, and up to 25,000 records. See Reviews of the Donor Management Systems for an in depth review of this system.

**DonorPro, by TowerCare Technologies**

**Online hosted system**

DonorPro has strong functionality in every category we reviewed. It’s particularly strong in support for pledges, accounting controls, mail-merging, and reporting (it includes a very nice ad hoc report writer as well as standard
The vendors of DonorPro have recently rolled out a new user interface that’s optimized for mobile and quite usable, with a particularly friendly tool for generating queries and sophisticated capabilities around batch gift entry, including a nice check scanning module. Email marketing capability is provided through an integration with Constant Contact, which allows users to track and get detailed reports on broadcast email. The system has powerful quick search capability, including phonetic searching to compensate for spelling errors, and this capability now includes searching for data in custom fields. Included modules provide support for events and membership management. In addition, the system provides functionality for human resources functions, inventory management, and patient services, which will be of particular interest to those in the health and human services sector. There have been significant updates to this system since our 2011 report. See Reviews of the Donor Management Systems for an in depth review of this system.

**DonorSnap, by DonorSnap**

Online hosted system
DonorSnap will be of interest to organizations in the market for a low-cost hosted system that provides basic donor management functionality in a user-friendly manner. You can search any number of user-defined fields from the search screen, accessible from the search button. Donor information is displayed in a comprehensive and cleanly displayed profile. DonorSnap lets you easily create custom fields which can be placed virtually anywhere in the system. There’s also basic support for householding and relationship tracking. Querying is strong, if sometimes complicated, and the system includes an array of useful donor reports that can be filtered easily. You can now save reports you’ve modified in DonorSnap, and the system also now has a module to support manual quick entry of gifts in bulk. The system has also added online donation and registration support, but as of this review still lacked accounting integration—the vendor has since released an integration with QuickBooks as of October 2013. DonorSnap charges only based on number of contacts in the system, and offers unlimited users. The system is $450 per year, payable monthly, for up to 1,000 records, with a discount for upfront payments. For a nonprofit with 20,000 records, the cost would be $2,270 per year, payable monthly, with a discount for upfront payments. Support is included, as is data migration for the majority of clients. There have been substantial changes to this system since our 2011 report.

**Donor Tools, Higher Pixels, LLC**

Online hosted system
Donor Tools, a hosted solution by Higher Pixels, LLC is geared toward smaller organizations looking for a straight-forward and easy to use donor management option. Gift functionality goes beyond the basics—for instance, users can not only define a payment schedule for a new pledge, but also attribute it to a fund or a source—all on a single page. Generating one-off thank you letters for pledges and gifts is also a straightforward affair, but you can't easily generate mail merged letters for a specific list of donors without exporting the list and merging in Microsoft Word. You can find donors using any contact field via a search box and once found, donor information is displayed cleanly and logically. Donor Tools offers easy access to templates in a well-laid-out interface. Donor Tools can now integrate with MailChimp, allowing users to easily create one-off and bulk emails in addition to letters. The system now allows for straightforward querying through the Smart Tags feature, and frequently used searches are easily accessible in most views, but Donor Tools does not allow custom fields. Donor Tools is offered at three pricing levels: $228, $486, and $948 per year, with support for pledges starting at the $486 per year level. All levels offer unlimited users.

**eTapestry, by Blackbaud**

Online hosted system
eTapestry is designed to be the lower-cost alternative donor management system to The Raiser’s Edge from Blackbaud. The system provides useful and affordable functionality for small organizations, and is scalable as an
organization’s needs evolve (although at considerable additional cost). The base product provides strong gift- and donor-tracking functionality, as well as reasonable email, mail-merged letter, and reporting functionality. Querying is complex and somewhat confusing (you must remember to set a “category base” when designing one, for instance). The system is very configurable—in addition to adding custom fields or deleting existing fields, you can add configurable “Journal” entries which allow you to track multiple linked fields and would be quite useful to track contacts with constituents (for instance, a date, a category, and a rating for the same interaction). Many system functionalities require an additional charge, however—for instance, the Personal Fundraising and eStore add-ons require additional fees. There are a lot of features and options in the system, and some terminology may not be intuitive to all users (“Persona” to define a household contact record, for instance) making it more complex to use than many we reviewed. The vendors draw some of the ideas for updates to the system from a crowdsourced roadmap from their users. The price varies greatly depending on the features you add and the number of donors you store. For the most basic edition of the software, a nonprofit with fewer than 1,000 records that sent fewer than 25,000 broadcast emails per year would pay $1,188 annually. For a more sophisticated edition of the software, but without add-ons, a nonprofit with 20,000 records that sent fewer than 100,000 emails per year would pay $5,964 annually. There have been major updates to this system since our 2011 report. See Reviews of the Donor Management Systems for an in depth review of this system.

Exceed! Basic, by Telosa Software

Installed on PC desktops or Online hosted system (via Citrix)

This is an inexpensive but limited system with reasonable support for donations, receipting, and reporting. A record covers an entire household, which is an interesting approach—you can store two people in that household, but you can’t track affiliations or gifts for each individual, only for the household as a whole. The view of actions is reasonably centralized, but gifts are separate from other actions, and actions only appear in a list as five-digit codes.

Since our last review, Telosa has added Constant Contact integration to the existing Vertical Response integration for Exceed! Basic, a welcome enhancement for organizations that communicate heavily via broadcast email. Receipt-generation is strong—for instance, you can choose to print a receipt immediately, or choose a letter template and easily do a batch run of everything (regardless of which template) later. Querying is done via a series of “extraction screens,” which may prove friendly to novices but tedious for power-users. Some screens are crowded and busy, but the general layout makes sense. Exceed! Basic has some limitations in contact management and flexibility that could be remedied by upgrading to Exceed! Premier (with free data conversion). It’s $499 for the first license and $100 for an additional user, with a number of support packages starting at $200 (or keep an eye out for discount offers from TechSoup). This system has had minor updates changed since our 2011 report. Many of these changes were outside the scope of our review criteria. Telosa is also preparing to roll out a cloud-based version, Exceed Beyond, in late 2013.

Exceed! Premier, by Telosa Software

Installed on PC desktops or Online hosted system (via Citrix)

This is an interesting system that considers each record an entire household or organization with which individual people can be associated. Unlike Exceed! Basic, Premier allows unlimited individual associations per household. Gifts can be tracked by individual, or can be aggregated per household. Donor profiles are generally well-laid-out, and receipt-generation is strong—for instance, you can choose to print a receipt immediately, or choose a letter template and easily do a batch run of everything (regardless of which template) later. Querying is performed via a series of wizard-driven “extraction screens,” which may be helpful for less savvy users. Advanced users more comfortable with querying can opt out of the wizard for more control and efficiency. You can then use those queries to send emails (with merged salutations) or create mail merged letters. Exceed! Premier now has a direct integration with Constant Contact in addition to the existing Vertical Response integration for broadcast email, as well as a direct integration with several accounting systems for an extra fee. Some screens are crowded and busy, but the general layout makes
sense. The events module tracks RSVP status, table assignments, and name tags, and is included in the core price. A number of fairly deep add-on modules—including Grants, Volunteers, and Wealth Screening—improve the system’s overall capabilities, for about $800 for each additional module. The system is $3,095 for a single user (or $2,095, if you only need to track up to 2,500 records), and $500 for each additional user, with an annual support cost of 20 percent of the license cost. A nonprofit with three users and 20,000 records that chose to implement two add-on modules and the support package would expect to pay $6,834 in the first year. This system has had minor updates changed since our 2011 report. Many of these changes were outside the scope of our review criteria. Telosa is also preparing to roll out a cloud-based version, Exceed Beyond, in late 2013.

FastFund Raising Online by Araize, www.araize.com

Online hosted system
FastFund Raising was reviewed in the 2009 edition of our report, but not in 2011. Since then, there have been many changes to the product, including the introduction of the online version that we demo’d this time around. FastFund Raising Online still offers nice, affordable features for tracking gifts, issuing thank you letters, and storing general information about donors, but remains limited in email and mail acknowledgements—for instance, you can’t edit a single letter within a batch acknowledgement process. The system provides an easy-to-understand donation history and summary of each donor, and lets you mark whether a donor is another kind of constituent as well, like a volunteer. The gift entry and thank you letter process is friendly when entering a single gift and users can now enter multiple donations and pledges through a new batch entry interface. Accounting integration is strong in FastFund Raising Online if you choose to use the Accounting tool which is also sold by Araize; if you use an external tool, you can still export transaction registers. Right now, there is no integration for online donations, although a partnership with a third party payment system is planned. You can build queries and create ad hoc reports using a somewhat complicated tool, and standard reports like LYBUNT, SYBUNT, and pledges outstanding come with the system. In FastFund Raising Online, you can customize a number of code types to help segment your lists, but not custom fields. The system is $900 per year, payable on a monthly basis, for a single user up to 10,000 names, and $1,200 per year payable monthly for up to five concurrent users. For lists of 10,000 to 20,000 names, the price for a single user is $1,500 per year, payable monthly. Payment processing, website integration, and broadcast email integration are additional charges. Discounts are available for small lists and if you choose to bundle with other products from Araize. Support and product updates are included, and Araize offers free weekly training webinars to its users.

FundRaiser Select, by FundRaiser Software

Installed on PC desktops
FundRaiser Select has solid donation management features, and can handle single pledges, though support for incremental or scheduled payments requires the purchase of a $300 “pledges” module. While the classic top-menu interface will feel familiar, many functions are triggered by buttons marked with icons whose meaning is often unclear and may steepen the learning curve for new users. There’s straightforward support for entering donations, and additional modules (at $300 each) offer support for memberships, premiums, tributes, product sales, volunteer tracking, and more. Address functionality is strong—every address can be tied to a season, and there’s support for international formats. A useful querying tool allows you to find a group of people, email them, or print mail merged letters using a built in word processor. By default, FundRaiser Select is not connected to an accounting system; the user must purchase QuickBooks integration separately for an additional $500. While it’s rather straightforward to track a household, the system does not handle other types of relationships, like employer of, employee of, etc. FundRaiser Select Installed is $1,400 to license a single user—additional users can be added for $250 each. Support is extra, but the first 90 days are included in the license. The vendor also offers a hosted, online version of the software for $179 a month, which includes two users and unlimited support.
GiftWorks, a FrontStream Company

Installed on PC desktops or an Online hosted system

GiftWorks is a very friendly and polished system that offers impressive functionality for smaller organizations. It provides useful gift tracking and donor management functionality, with a nice “dashboard” of all your interactions with donors. Emailing, mail-merging, querying, reporting, and accounting controls are also solid. Online donations are available through a new integration with FirstGiving, at no additional cost, and broadcast email functionality is included, with additional functionality possible through integration with Constant Contact or MailChimp. While the base product is limited in its support for interactions for online donations, broadcast email functionality is included and an add-on module provides basic online donation functionality. The Premium version adds support for seasonal addresses, different user roles, and additional custom fields. The system is full of wizards and features to make it easy for you to find what you need, but these same features may slow down an advanced user somewhat, and no advanced ad hoc reporting tools are included. The system also allows users to search for donors phonetically, and enter large numbers of gifts through a quick-entry interface. GiftWorks Standard starts at $1,080 per year for unlimited users and up to 1,000 donor records; the Premium edition starts at $1,680 per year for up to 2,000 records. The Pro edition can support up to 25,000 donor records for $4,188 per year. The Volunteer and Event modules are now included with all pricing tiers. GiftWorks Anywhere, the company’s online, hosted solution, starts at $1,320 per user per year, and includes the SmartPlan support package. Email support is free; unlimited phone support is available as part of the required SmartPlan for $468 per year. See Reviews of the Donor Management Systems for an in depth review of this system.

Little Green Light

Online hosted system

Little Green Light’s pedigree in the school fundraising field shows through in the power and ease of use of core donor management system functions, and the system’s functionality has been greatly expanded in recent years. Simple workflows for the entry and retrieval of donor information, strong search capabilities, and a clean screen layout contribute to this product’s approachability, a critical factor for systems used frequently by occasional users and volunteers who lack the time to devote to mastering a complex system. Little Green Light now also has integration with Mail Chimp and Constant Contact as well as built-in broadcast email capability, can process payments through an integration with PayPal, and integrates with Form Stack and Wufoo for online forms. The system can also manage basic volunteer data, and handles gifts and their acknowledgements quite ably. Batch gift entry still relies on importing of external spreadsheets, but there’s also a nice quick-entry interface. The vendors have also added some standard reports that can be exported to .pdf, and ad hoc reporting is straightforward. Customization is somewhat limited—you need to ask the vendor to add or hide fields. Little Green Light also has a new pricing structure: Organizations with fewer than 2,500 constituents pay $468 annually on a monthly basis, with a discount for a lump annual payment. A larger nonprofit with 20,000 records would pay $828 annually on a monthly basis, with a discount for a lump annual payment. There are modest implementation fees, and support is included. The system has undergone major upgrades since our 2011 report. See Reviews of the Donor Management Systems for an in depth review of this system.

MatchMaker FundRaising Software Enterprise Edition, By Heritage Designs, LLC

Installed on PC desktops or an Online hosted system

The company is run by former nonprofit development staff, and that experience shows in the application. While screens are simple and clean, the interface often relies on icons or images whose meaning isn’t always immediately clear—for example, an hourglass on the donor record to show an outstanding pledge, and a smiley face to indicate
a volunteer. Some users may struggle with these interface issues, but generally this system is fairly understandable for the average user. It also supports lots of useful reports, and is laid out nicely with lots of query options—overall, a robust system. It also has strong, automated ties to QuickBooks. There’s no ability to add multiple gifts via a bulk entry screen, but the system handles receipting well. Automatic payment processing for donations or events can be accomplished through an integration with the partner vendor Qgiv. The Enterprise Edition is $2,790 for a single user, $3,795 for two users, or $5,495 for multiple users. Annual support for is $700, $1,200, or $1,500 for one, two, or three-plus users, respectively. A less-expensive Standard version is also available, and has changed little since it was reviewed in our 2011 report.

NeonCRM, by Z2 Systems

Online hosted system

NeonCRM from Z2 Systems is a strong integrated online system with solid support for donor management. It has support for pledges, soft credits, and batches for accounting purposes, and prospect management workflows that let you track the steps taken to convert prospects into active donors. The system automatically logs internally generated communications, and can also log email you send from any other system by including a special email address in the bcc line. Gift data can be easily imported into the system. There is some functionality to track and report on grants separately from other gifts, you must use custom fields to track foundation interest. The system also allows browser-based access via smartphones. The support for mail-merged letters is useful, and broadcast email is bolstered by a MailChimp integration. NeonCRM has very strong functionality for Web integration and online payment processing, reporting, querying, and the ability to customize. It supports a wide variety of constituent interactions—it not only has events, volunteers, and membership functionality, but also full online-store functionality, including inventory tracking. There have been significant updates to this system since our 2011 report. See Reviews of the Donor Management Systems for an in depth review of this system.

NonProfitEasy, by NonProfitEasy

Online hosted system

NonProfitEasy is a newer, web-based system that grew out of a partnership between several different nonprofits, a grant from a community foundation, and a consultant with a background in data analytics. It’s an interesting new option that is strong in support for online giving and bills itself as a full constituent relationship management tool, but might not be the most intuitive for veteran fundraisers. The interface is clean and attractive, and roles of constituents within the system (donor, student, volunteer) are automatically set by the constituent’s activities with the organization as logged in NonProfitEasy. Roles are represented by easy-to-understand icons that appear next to the donor record on the search interface. NonProfitEasy is structured around individual or organizational contact pages which are bound together with other entities through bi-directional relationships. All relationships are displayed on a contact record together, but you can distinguish who shares a household through a small “house” icon that appears next to the names of the relevant constituents. Dashboards display useful information about both donations and other financial interactions, like membership dues or purchases from an online store, as well as contacts you’ve had with them. However, fundraising capabilities aren’t the strongest—pledges and grants are managed through the same interface, you can’t easily see when a pledge is overdue, and the default gift entry screen asks users to “check out” in a shopping cart. It’s possible to skip this process through the “Checkout and Process” button, but the user can only do so from the shopping cart interface. When the vendor demonstrated the product for us, it was not possible for users to customize the pledge payment schedule (to accommodate for irregular payment amounts, for instance). The vendor reports that this functionality will be available in a new Pledge module starting in July 2013. There’s a batch entry mode to quickly enter multiple gifts, which allows you to set defaults. Email and other acknowledgements are strong, and querying and reporting are complex. At the time of our demo, there was no publicly available direct
integration with Quickbooks or other accounting systems. The vendor has since released an integration as of June 2013. The system is highly customizable, with the ability to configure an individual user interface, add custom fields and modules, and enter custom data sets. The system also has robust volunteer and event management functionality. NonProfitEasy also has some add-on modules that enhance its functionality for additional cost, like facility rental. There are several tiers of the program, based on concurrent users and how many email blasts an organization sends per year. A nonprofit with two concurrent users and 30,000 annual broadcast emails would pay $600 per year on a monthly basis, with an annual discount, while a larger nonprofit that needed unlimited concurrent users and sent over 100,000 emails a year would pay $3,600 per year, again on a monthly basis with an up-front annual discount. Email support is included, but the vendor charges for phone support.

Nonprofit Manager, by Trail Blazer

Installed onto PC, Mac desktops and Tablets
Trail Blazer’s Nonprofit Manager is an installed package that will be of particular interest to organizations that need powerful options for querying, analyzing, and reporting on their data. An array of standard reports are available for your use but unique among the systems we reviewed, Nonprofit Manager includes spreadsheet-like pivot table capabilities that let you quickly summarize the data in these reports by practically any columns you want. Email and mail merge capabilities are also strong, with unlimited templates and powerful querying capabilities. Also useful are the system’s ability to let you track event registrants and ticketing, as well as details about volunteer capabilities and hours. However, Nonprofit Manager isn’t as customizable to your nonprofit’s needs as other systems in this report. Relationships can’t be added by users; however, Trail Blazer Support will add it for you with a phone call or email. You can customize an unlimited number of attributes which help with segmenting your lists. Trail Blazer Nonprofit Manager has a pricing structure calculated based on the amount of concurrent users as well as how many records in the system. A small organization, with fewer than 1,000 records and up to five concurrent users will pay $1,200 per year, on a monthly basis. A nonprofit with up to five users and 20,000 records would pay $3,576 per year, on a monthly basis. There have been minor updates to this system since 2011.

PatronManager, By Patron Technology

Online hosted system
Arts-focused organizations that manage events and ticket sales in addition to constituent management might be well-served by a serious look at Patron Technology’s PatronManager. Built on the Force.com platform, PatronManager transforms Salesforce Nonprofit Starter Pack into a basic donor management system with powerful assigned seating ticketing and event management. A real-time website module combined with staff sales tools allow both online and box office sales. Patron Technology also adds a proprietary PatronMail broadcast emailing tool to the base Salesforce system. This system is not as strong as others when it comes to pledges. While adding a pledge is similar to adding a donation, you’ll need to set up alerts through the workflow in order to notify users when a donor has an outstanding pledge, and applying a donation to a pledge is a slightly unintuitive process of changing the stage of an expected payment from “Pledged” to “Posted.” While it is not feasible to enter multiple gifts at once yourself, Patron Technology will import multiple gifts for you if you have more than you can reasonably enter one at a time. For organizations that do not sell tickets, PatronManager has an annual fee starting at $2,500. For organizations that do sell tickets, Patron Technology instead draws revenue from per-ticket fees on credit card orders, which range between $1 and $4 per ticket, paid by patrons. Patron Technology asks that ticketing clients meet an annual minimum of $2,500 per-ticket fees collected, and that clients who do not meet this minimum pay the difference.
The Raiser’s Edge(i), by Blackbaud

Installed on PC desktops or Online hosted system

The Raiser’s Edge(i) by Blackbaud is a well-established and sophisticated donor management tool. In this version of the software, the Raiser’s Edge fundraising software is packaged with online donation and email marketing capabilities through NetCommunity Spark, also in the Blackbaud suite of products. In The Raiser’s Edge(i), individuals and organizations are “constituents” and, as with all connections between constituents, households are represented by linking constituents together through user-defined-attribute relationships. This can be a bit confusing at the relationship-dashboard level, since you can see relationships ranging from a donor’s daughter to his golf partner, but you can apply filters to be able to easily see relationships of interest to you. Constituents are assigned user-defined codes to help with list segmentation, and searching abilities are flexible and powerful. Gift- and pledge-tracking is very robust, and acknowledgements are handled through a mail-merge integration with Microsoft Word. The Raiser’s Edge(i) has a complex and powerful querying tool that accommodates dynamic queries, but to send broadcast emails to a particular constituent group, you need to switch to NetCommunity Spark interface before doing so. The system comes with many best practice reports and dashboards that are relatively straightforward to tailor to an organization’s specific needs. To truly create an ad hoc report from scratch, an organization would need to use the external custom reporting tool, Crystal Reports. There’s a direct integration with the Financial Edge, Blackbaud’s accounting system. Pricing for the Raiser’s Edge(i) is $10,050 for a single user license, which includes an implementation fee but not support, which ranges from $1,000 to $2,250. For a nonprofit requiring three user licenses, the price is $20,025 in the first year. There are also ongoing annual maintenance fees, ranging from about $2,000 to $3,000, which include support. Training requires an additional fee of between $1,000 and $3,750. See Reviews of the Donor Management Systems for an in-depth review of this system.

ResultsPlus, by Metafile Information Systems

Installed on PC desktops or Online hosted system

ResultsPlus has a friendly, polished-looking interface with a lot of nice features, but querying can be difficult for non-technical staff. The system offers nice support for custom data entry screens, gifts, grants, relationships, and more. Householding functionality in ResultsPlus allows you to tally gifts either by individual or household. To facilitate accounting reconciliation, all donations and receipts must be entered and run in batch. Donor records are very customizable, with the ability to set up custom data types with multiple fields (for instance, you could set up the ability to track a date, description, and hours for each volunteer interaction for a donor). An interesting interface lets you define a list of people (through a query, or one by one) and work your way down it. Querying has improved since the 2011 report; queries are built through a five-step wizard and users select table and field names through dropdown menus. Most table and field names used for queries are intuitively named, and any field name can now be found through tooltips by hovering your mouse over a field or table in a donor record. Once created, queries can be used to generate both merge letters and emails. The system comes with a wide variety of standard reports, but you can also create new ones through Crystal Reports and display them in the same interface. A feature rich events module is available at additional cost. Pricing starts at $1,000 for a single user and up to 1,500 records. To go beyond a one user system, it’s $4,000 for three users, plus $500 per additional user. Support is available at an additional charge. A hosted cloud version is also available at $250 per month for two users and unlimited donor records. Support is included with the online version.

Salesforce Nonprofit Starter Pack, by the Salesforce Foundation

Online hosted system

Salesforce is a powerful Constituent Relationship Management system used widely in the for-profit world. The Enterprise edition of the software is free for free to 501(c)(3) organizations for up to 10 licenses, and Nonprofit Starter Pack is available with some basic support for donations out of the box—you can download it from the
Salesforce Foundation’s website. This customization provides a basic template to handle nonprofit and donation data that can be used as-is or extended by tech-savvy staff or a developer at additional cost. There are many options for querying, receipting, segmenting, reporting, exporting, and integrating with other systems. Householding and relationships have been refined substantially since we last looked at the system. The system is very flexible in tracking and displaying all the myriad ways a constituent might interact with an organization—but this flexibility brings complexity. It’s harder to learn to use than some of the other systems, and many will want to work with a consultant to get the system set up. We’ve looked at several systems that use Salesforce as a building block in this report, including Affinaquest, Causeview, Click & Pledge, and PatronManager. See Reviews of the Donor Management Systems, for an in depth review of this system.

**SuiteDonor, by NetSuite**

**Online hosted system**

NetSuite’s SuiteDonor (formerly Do Good Better), offered as a free grant to qualifying nonprofits, offers sophisticated fundraising functionality with an integrated accounting system geared at those with more advanced system needs. It’s organized around a well-organized and customizable dashboard that features key performance indicators and other useful information. You’ll generally find NetSuite SuiteDonor has all the basic functionality you need for donor management, though some areas could benefit from more automation. For example, a user would have to manually indicate a donation as having been acknowledged. While there is no easy way to merge gift strings, email and mail-merge functionality are otherwise powerful and comprehensive. Querying functionality is strong, though possibly complex for novices, and the system offers integration with online donation forms. An array of standard reports is available, and reporting functionality incorporates charts and graphs as well as data-based tables. Users on the go will appreciate the ability to view these reports on their smartphones via a NetSuite app. Intrepid users with a little tech savvy can often build custom functionality, automation, and other desired functionality without hiring a programmer. See Reviews of the Donor Management Systems for an in depth review of this system.

**Sumac, by Sumac**

**Installed on PC desktops or Online hosted system**

While many systems have moved to navigation schemes built around complex menu systems, Sumac pointedly bucks this trend and embraces simplicity. Upon startup, Sumac greets the user with a basic menu of well-labeled buttons that leave no doubt as to how to get started. This straightforward approach carries through most areas of the system’s basic functions, like working with donors and gifts, setting pledges, online donations, and setting up one-off “thank-you” letters, all of which Sumac handles competently. The basic donor overview, however, could feel cluttered rather than well-organized depending on how many modules are installed—this could be an issue in particular for organizations that want to track a lot of different types of things about each constituent. Reporting support is strong, and powerful querying functionality is assisted by a unique visual guide that shows users the number of constituents that will be found by each piece of their complex query before the query is run. Sumac can automatically record accounting information for transactions using the built-in Ledger Entries feature, which can be used to either create reports within the system or exported to a separate accounting tool. The system supports broadcast emailing and includes basic delivery reports; messages are sent through the client’s servers, potentially exposing them to blacklisting, or they can be exported to a third-party broadcast email client. Sumac charges $240 per year for one user, 1,000 records, and choice of any two specialized modules; $1,350 per year gets you unlimited users, unlimited records, and a choice of any number of specialized modules. Support is included in the price. For an additional $25 per month, Sumac Online allows you to access the database in the cloud.
Sustain, by Sustain, LLC

Installed on PC desktops or Online hosted system

A fairly well-rounded system intended to house a fundraiser’s entire workflow, Sustain allows a user to perform most tasks without leaving the system—emails, letters, and printed materials can be created from a built-in text editor, and the system also includes a built-in notepad for making freeform notes about donors and a built-in screenshot tool. Sustain is unusual in how it handles households; each donor record can hold information for two people. For example, under John Smith’s profile, John Smith would be tracked as “Person 1” and Jane Smith would be “Person 2.” From the record a user can set the appropriate default greetings for letters, emails, or envelopes for the household. Reporting in Sustain is solid and mostly straightforward for less-technical users, but querying is only possible through the Reports section, and there is no integration with an accounting tool—users must export batches of donations and manually import. Pricing starts at $3,000 for one user license, with $700 per year for support; for three users, $5,500 and $1,100 per year for support.

Talisma Fundraising Online, a Campus Management Solution

Installed on PC desktops or Online hosted system

On the higher pricing end of the systems in this report, Talisma Fundraising offers powerful fundraising capabilities. Users are presented with a number of useful and commonly used functions on the home screen, including favorite reports, saved queries, and frequently-accessed or favorite donor records. The system comes with a large amount of useful standard reports, powered by Crystal Reports, and the process for creating a custom or ad hoc report is simplified with a minimum of steps through a straightforward report-building wizard. While gifts and pledges are straightforward to enter, especially through the batch gift interface, the system doesn’t automatically notify users of outstanding or overdue pledges. Users may prefer to integrate with a third-party broadcast email client, as the email functionality within Talisma does not allow you to use a custom HTML template. Additional modules exist that provide robust member, volunteer, and event management among others. The system is available either installed or online. Licensing for the installed version starts at $2,495 for a single user and unlimited records, and annual support and maintenance fees of $624; for three users, an organization would expect to pay $4,495 up front, with annual fees of $1,124. The online version starts at $1,872 per year for one user in a three-year contract, although first-year setup fees would bring the total cost in the first year to $6,672. See Reviews of the Donor Management Systems for an in depth review of this system.

Total Community Manager, by Unger & Associates, LLC

Installed on PC desktops or Online hosted system

Total Community Manager is a low-cost, but lightweight option for nonprofits looking to track more than just donors—like members, volunteers, and event attendees. Donor records are comprehensive, recording not only donation history but also event attendance, contact history, and volunteering, and are easy to navigate through a user-friendly interface. However, it’s not possible to add custom fields, and there are no “household” records. Instead, members of a household are all linked together through relationships; a user must go to the “Relationships” tab or an individual donor’s record or run a report in order to view all the records in a household. The system does not currently integrate with an accounting system, like QuickBooks; the user must export donation history to a general ledger themselves. Total Community Manager has both installed and hosted online versions, but online donations can only be recorded manually, by importing the data from a spreadsheet. A basic license with two simultaneous users starts at $650 for the installed version; the online version starts at $1,749 per year for two simultaneous users—according to the vendor, pricing was scheduled to change in late 2013.
Total Info by Easy-Ware

Installed on a local server and available on PC or Mac desktops

Total Info is a solid system, particularly for arts organizations looking for an integrated box office solution, but is a bit hampered by some usability issues. It has useful support for gift and donor tracking, emailing, querying and reporting, and for volunteers and events, and is quite strong in print and electronic mail merge capabilities. Relationship-management and prospecting features are also particularly strong. Total Info stands apart from competitors in its detailed theater-style ticketing and box office functionality as well as its education/class-registration functionality—two very unusual features. Between a fairly technical looking interface, an unusual layout, and complex screens, less-technical users may initially find the system a bit overwhelming. You'll likely need a dedicated server for the system if you want more than two users; users access the system from their desktops via Remote Desktop Services. The vendor reports that it offers free set-up for the system and server. The infrastructure supports any kind of desktop computer, including Macs, and you'll need a staffer who's willing and able to install updates to the system over time. Total Info costs $795 for a single user, up to $2,495 for three or more users; support and maintenance costs an annual fee of $420. There have been several updates to the system since our 2011 report. Most of these changes were outside the scope of the review criteria.
REVIEWS OF THE DONOR MANAGEMENT SYSTEMS
This free and open source online system offers basic functionality for donations as well as a number of other constituent interactions. It’s straightforward to add a donation and receipt it via email. The system has support for a number of different interactions, including a strong event module, and you can see a useful summary of each constituent’s relationships and activities. CiviCRM comes with a selection of standard donor reports, and allows you to easily include charts and graphs in your reports. Users looking for automation for workflows and reminders will need to set up CiviCase, a case management system integrated with CiviCRM. There is tight integration with common website Content Management Systems like Drupal, Joomla!, and WordPress, and with online payment and form-building functionality. Since the last report, CiviCRM has added the ability to batch donations for integration with QuickBooks or other accounting systems. You’ll need someone familiar with installing and configuring open source systems on a web server in order to get you up and running. Several third-party providers offer turnkey hosted installations of the product. Since CiviCRM is open-source, the community provides add-ons to enhance its functionality, or with the help of a skilled programmer you can build just about anything you want. There have been significant updates to this system since our 2011 report.

**Adding and Tracking Donations**

- **Quick Search:** Lets you quickly search the database for an existing person or organization from anywhere in the interface using a form that searches first name, last name, address, constituent ID, and social security number.
- **Quick Search on Custom Fields:** Lets you find a person by searching data entered into custom fields.
- **De-duping:** The system helps prevent duplicate entries when new people are entered by prompting you with a list of existing people with the same name, maiden name, or contact information. Names are matched on “name classes” (which would identify Judith Smith and Judy Smith as potential duplicates) as well as identical names. The system prevents duplicate entries based on fields other than name (e.g. email address, organization).
- **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.
- **Batching Gifts:** The system does not group donations into batches for reconciliation with accounting systems.
• **Gift Quick Entry Interface:** Does not provide a streamlined quick data entry interface within the system, although gift data can be imported.

• **Updating Donor Info via Quick Entry:** The quick entry interface lets you automatically update, but not create, donor contact information.

• **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats.

• **Adding Pledges:** Lets you enter pledges for future gifts, including the amount and scheduled date. The system can create a full set of pledges based a payment schedule, which you can then customize as needed, but won’t automatically adjust the payment schedule as needed if a pledge is overpaid or underpaid or automatically remove unfulfilled pledges over “X” days old from automated reports.

• **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, the system asks if you want to apply them against existing pledges.

• **Reminders for Pledges:** Staff members are notified with optional pop up reminders when pledges are due.

• **Matching Gifts:** Cannot easily track matching gifts that need to be claimed from employers. Matching gifts can be tracked as a soft credit, but you cannot track the match amount or distinguish matching gifts as a category.

• **Stock Gifts:** The system cannot track stock donations out of the box. Users could track the unsold and sold values of stock gifts by creating a new gift type.

• **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, and in-kind gifts. The system is quite configurable to support additional gift types.

• **Campaigns or Funds:** Lets you assign gifts to a source, purpose, campaign, sub-campaign and fund, but you cannot split the gift across multiple of any of these.

• **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like.

• **Gift Notes:** The system lets you add freeform notes to a gift. These notes can be queried and reported on.

• **Attaching Documents to Gift or Activity Record:** The system lets a user upload and attach documents to gifts, activities, and/or proposals and stores them as part of the database. This would have to be set up as a custom field on the donation entry form.

• **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.

• **Zero Dollar Donations:** Lets you enter a gift with a zero dollar value for reporting purposes, as an in-kind gift. Lets you also record the amount of the gift that’s tax deductible.

• **Gifts “In Honor of” and Tributes:** Lets you record gifts as “given in honor of” or “in tribute to” as specific gift types, but does not let you schedule notifications—for instance, summary thank you letters—to the honorees.

• **Premiums:** Lets you assign and track premiums and record tax deductible amount.

## Managing Donor Information

• **Multiple Contact Methods:** Lets you track as many phone numbers and addresses as you like, label them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method.

• **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings.

• **Seasonal Addresses:** Lets you track people’s seasonal addresses only as “other address”; without effective dates and without automatically switching primary addresses for the appropriate timeframe.

• **Do Not Contact:** Lets you mark that a particular person should not be contacted, which is prominently displayed on the constituent record. Constituent who have opted out of bulk emails, postal mailings, etc. are automatically excluded from mass mailings. Lets you easily generate a list of members for whom there’s no email address (i.e. to target them by mail instead). Constituents can specify alternate or preferred methods of contact, if applicable.

• **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, “family member,” “co-worker”) with custom relationship types.

• **Bi-Directional Relationships:** Lets you define relationships between donors as two-way (“spouse”) or directional (“boss; works for...”), and automatically assigns the appropriate relationships for both donors.
• **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships.

• **Householding:** A database record describes a single individual and all their contact information and actions; you can connect them to others in their household through special relationships.

• **Staff Relationships:** Lets you track connections between donors and as many of your own staff members as you like, along with what staff member is responsible for the relationship.

• **Donor Notes:** Lets you query and report on freeform notes about donors.

• **Manual Communication Log:** Lets you keep a manual log of communications such as phone calls or personal meetings through activities. Manual communication logs are included in system queries and reports.

• **Automatic Communications Log:** Automatically stores a record of all system-generated letters and emails for each donor.

• **Donor Dashboard:** Lets you easily see all recent communications and donor actions on one screen. You can customize this screen to include the fields that are most important to you.

• **Giving Totals:** Lets you easily see in one click or less from the main donor page all recent gifts, the number and amount of gifts this year, and total giving.

• **Donor Source:** Lets you track the source of a particular donor.

• **Organizational Profile:** Lets you create a profile for an organization and track the people who work for it.

• **Deceased Donors:** Lets you record donors as deceased by checking a field. Deceased donors are excluded from mailings.

• **Online Integrated Data Cleaning and Appending:** Lets you click a link on a donor profile to view USPS information for that donor.

• **Mobile Support:** Lets you access constituent records from mobiles via a mobile web browser. The system is not customized for mobile web browsers. Lets you access constituent records and run reports, but not enter data, via an application designed specifically for mobile access.

• **Attaching Documents to Donor Record:** Lets you attach documents to the donor record and store them as part of the database.

• **Ability to Track/Integrate Social Media Information with Donor Record:** Lets you record a donor’s social media links to fields in the donor record.

• **Ability to Track Donor Social Media Activities in the System:** Does not meet this criteria.

**Prospecting and Proposals**

• **Prospecting Workflow:** Lets you assign both a priority and a stage to a donor to manage a prospecting workflow. You can also create your own custom stages and track a donor’s progression through them, with associated dates, through CiviCase.

• **Ticklers:** Lets you create a reminder for yourself for a particular task and date if you install the integrated and free CiviCase add-on module; shows the reminder prominently on the bottom of every screen at the appropriate time.

• **Creating Ticklers for Others:** Lets you create a reminder for someone else to do a task on a particular date if you install the integrated and free CiviCase add-on module.

• **Donor Research:** Does not provide any functionality to automatically match donor information to outside resources in order to provide more information on giving capability and priority.

• **Reporting on Asks:** Lets you create reports that show all the asks that have been made, as well as the gifts.

• **Finding Your Prospects:** Lets you easily see the list of donors assigned to you as a solicitor through segmentation.

• **Proposal Tracking:** Lets you track what proposals are due if you install the integrated and free CiviCase add-on module.

• **Foundation Interest Tracking:** Lets you track a particular foundation’s interest areas via custom fields only.

• **Grant Tracking and Reporting:** Does not let you track and report on incoming grants as a grantseeker except via custom fields. The system does have some support, however, for tracking outgoing grants for grantmakers.

• **Thresholds and Action Triggers:** No special functionality to support thresholds and action triggers.
Permissions

- Permissions: You can grant groups access at a functional level for a wide variety of system functions.
- Field Level Permissions: Cannot define user or group permissions on a field-by-field basis.

Mail Merging Letters

- General Mail Merge Approach: Lets you create and save letter templates within the system, and then mail merge to them without the need for any other system.
- Mail Merging on a Mac: Lets you mail merge letters on a Mac. As all letters are mail merged through the server, it doesn’t matter what operating system is running on the desktop computer.
- Flexibility of Letter and Thank You Templates: Lets you flexibly create letter templates with complete control over layout, formats, logos, and images using their built-in word processor.
- Personalizing Letters: Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.
- Tracking That Letters Were Sent: Automatically logs for each donor that a letter was sent.
- One-off Thank Yous: Lets you easily mail merge and print a single thank you letter from the gift entry interface by choosing from a number of letter templates.
- Batch Processing of Thank Yous: Lets you build a queue of people to be thanked by marking them at gift entry. You can then create letters for everyone in the queue at once.
- Mail Merging Gift Strings: Cannot create letters that include custom gift strings based on a donor’s previous giving history.
- Creating One-Off Letters: Lets you mail merge a single letter using your choice of letter templates from a donor record.
- Defining Group to Mail: Lets you print letters through the system for a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event).
- Printing Labels: Lets you easily print labels for a set of people from the same query result page used to print letters.

Emailing

- One-Off Email: Lets you easily send email to particular individuals from their donor records.
- Defining Group to Email: Lets you send email through the system to a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event).
- Merging Data into Emails: Lets you create individual and group email that includes both standard text and “mail merge” type inserted data.
- Merging Gift Strings into Email: Cannot send emails that include custom gift strings based on a donor’s previous giving history.
- Graphical Emails: Lets you create and save graphical email templates to use in emailing groups.
- Scheduling Emails: Lets you schedule email to send in the future.
- Email Server: As a client-hosted web-based system, emails are by default sent via your own email server. This approach incurs a greater risk that your own email domain will be blacklisted. The system can be configured to send email through a third party email provider distinct from your organization’s systems.
- Unsubscribes: Donors can easily unsubscribe from emails without involving the organization.
- Email Reports: Lets you see the open rate, click-through rate and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports to allow you to follow up on email addressed that didn’t go through.
- Automatic Emails: Lets you set up automatic emails based on certain events.
Querying

- **General Querying Approach:** Lets you create powerful queries with comparative ease by defining a series of criteria and filters. You can also write your own SQL queries if you like.
- **Querying Based on Giving:** Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts, and number of gifts this year compared to prior years.
- **Querying on Any Field:** Lets you query using criteria from any database field, including custom fields.
- **Complex Queries:** Lets you create complicated queries using an unlimited number of criteria connected with logical “ands” and “ors.”
- **Expanding Queries:** Lets you easily limit or expand a query after you’ve generated the list by saving the query and editing it again.
- **Saving Queries:** Lets you save queries to be run again later.
- **Taking Actions on a List:** Once you have created a list, you can mail merge letters to that list, email to that list, update most fields in the database for the list, or export the list.
- **Packaged Queries:** Includes the package queries underlying the standard reports.

Reporting

- **Standard Reports:** Lets you easily generate prepackaged reports including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This One (LYBUNT) or donors from Some Year but Unfortunately Not This One (SYBUNT). However, they offer few standard reports compared to other reviewed systems—the system is designed to allow most reports to be built by the user.
- **Giving Reports:** Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.
- **Comparing Campaign Success:** Lets you compare success metrics for a number of different campaigns, but via queries rather than via one report designed for this purpose.
- **Reporting on Pledges:** Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts.
- **Ad Hoc Reports:** Supports Ad Hoc reports within the system which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos and headers.
- **Custom Fields in Ad Hoc Reports:** Custom fields can be displayed within Ad Hoc reports.
- **Saving Reports:** Lets you save reports that you create or modify.
- **List of Favorite Reports:** Lets you quickly view favorite reports without navigating a much larger set.
- **Exporting Reports:** Lets you export reports to Excel or CSV formats, among others.
- **Distinguishing Reports:** The vendor highlights the personal campaign page summary report as a distinguishing report. The vendor also highlights that, as an open source project, the queries and filters that make up reports are freely available for developing additional functionality for the system.
- **Custom Reports:** Lets you create custom reports by copying and modifying an existing report or report template.
- **Graphical Capabilities:** The system lets you add a wide variety of charts and graphs to reports.
- **Dashboard Placement:** Lets you place reports on a dashboard for quick viewing.

Payment and Website Integration

- **Processing Credit Cards:** Lets you charge donors’ credit cards within the system.
- **Recurring Gifts:** Lets you set up recurring gifts which are both logged and charged to donors’ credit cards at designated intervals, as long as your credit card processor allows this.
- **Web Signup Form:** People can easily sign up for your email list via an integrated signup form on your website. Web forms can can customized and branded by client via WYSIWYG editor, but HTML skills required for detailed branding and navigation customization. Alternatively, forms can be embedded into a page on your website.
• **Online Payments:** Lets you set up an online payment form on your website and pull online payments automatically into your database.

• **De-duping Online Actions:** Online signups or payments are logged to donors’ existing payment records, by matching the name and email address.

• **Event Registration:** Lets you hold online registration for events, including multiple ticket prices (such as a VIP ticket) and meal options.

• **Online Recurring Payments:** Lets donors set up recurring payments online (such as monthly donations) which are automatically charged to their credit cards.

• **Distributed/ Team Fundraising:** Supporters cannot set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts.

• **Membership Dues:** Lets members pay membership dues online.

• **Shopping Cart:** Lets supporters purchase multiple items at once, as through a shopping cart.

• **Payment Form Customization:** Vendor provides an online payment form which can be customized to completely match your website.

• **Transaction Fees:** Vendor does not charge a transaction fee for each payment. You will need to set up your own merchant account, which will entail additional transaction fees.

• **Refunds:** You must issue refunds through the merchant account, and then log the refund into the system manually.

• **Recurring Payments:** Lets donors set up recurring payments online (such as monthly donations), which are automatically charged to their credit cards.

• **Mobile Giving:** Can access the donor portal via mobile phones.

• **Self Management of Donor Record:** Lets donors manage their own contact information online.

### Tracking Other Interactions

• **Event Registrants:** Lets you track everyone who has registered for a particular event.

• **Tracking Guests:** Lets you track non-paying guests for particular events, and distinguish them from those who paid.

• **Table Details:** Cannot manage any table details for an event, such as names of table captains, seating arrangements, or the amount of gifts raised per table except by using custom fields.

• **Nametags:** Lets you create nametags for an event via their standard mail merge process.

• **On-Site Registration:** Provides on-site registration facilitation for iPhones via a downloadable app.

• **Volunteer Interests:** Lets you track one set of interests in order to match volunteers with jobs.

• **Volunteer Work Tracking:** Cannot log any details about specific hours and tasks for volunteers unless you add custom fields. While this could support some functionality here, it would not be as robust as the tracking provided by some other systems.

• **Membership Tracking:** Provides functionality to track member levels, payments, and expiration dates.

• **Other Interactions:** In addition to the interactions we’ve covered here, the system offers support for surveys, petitions, and campaigns.

### Customization

• **Customizing Values:** Lets you customize drop-down values for fields such as campaigns, type of relationships and many others.

• **Custom Fields:** Lets you add an unlimited number of custom fields, which can be placed on most screens in the system.

• **Renaming Fields:** Lets you rename existing fields.

• **Moving or Deleting Fields:** Lets you move or hide some fields within the interface.
• **Custom Constituent Interactions:** Lets you create your own custom interactions, in order to track multiple pieces of data about a single interaction (for instance, to track date, title, and audience rating for the lectures delivered by your volunteers).

• **Vendor Customization:** Vendor will customize system to your needs at additional cost.

• **Access to Source Code:** As an open source system, the source code is available to anyone who wants it.

**Integration**

• **Existing Integrations:** Can automatically exchange data with Drupal, LDAP, and online maps (Google and Yahoo); limited Constant Contact integration. Outlook Integration is available through an additional cost module.

• **Data Export:** Lets you export all data visible to users into another file format, such as .XLS or .CSV.

• **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data. Can do a batch import for the system install, and an “incremental” import for subsequent jobs that adds deduplication functionality.

• **Programmatic Integration:** Provides an API to allow a programmer access to a very basic set of data, in order to create custom data feeds.

**Accounting Support**

• **Existing Integrations:** Lets you create a file format tailored to upload easily into QuickBooks.

• **Approach to Batching:** Lets you create batches of payments in order to ease the reconciliation process with an accounting system, including separate batches for checks, cash, and credit payments.

• **Reconciling a Batch:** Cannot mark a batch of payments as “reconciled with accounting.” You can mark records as being passed to accounting, but this is not quite reconciliation.

• **Controlling Reconciled Donations:** Each gift record is “locked” after the batch is exported. Those who have permission to unlock a gift could then do so and update it. The system will log such changes.

**Ease of Use**

• **Ease of Use for Novices:** Moderate. The organization of the system relies on many different screens, each with lots of screens and buttons. There’s a lot of information on each page, making it sometimes difficult to find features or fields. Less technically savvy users may feel initially overwhelmed.

• **Speed for Expert Users:** Moderate. Once you get used to the interface, it will be much faster to get things done, but there are still a lot of screens and fields to navigate through for many tasks. It doesn’t provide a lot of specific functionality to make common tasks faster.

**Support and Training**

• **Training:** Vendor provides training, either via the internet or live, at additional cost. Training videos are available without cost.

• **Manuals and Documentation:** Documentation is available online, free of charge.

• **Support:** Free support via forums and dedicated IRC channel. Paid support available from professional service providers.

**Installation and Maintenance**

• **Installation and Maintenance:** As is typical with a self-hosted, web-based system, you will need to set up and maintain a web server on which to install and run the system. Qualified IT support will be needed for initial setup. CiviCRM can also be hosted and maintained by third party vendors at additional cost.
Product Background

• History: CiviCRM is an open source system sponsored by Social Source Foundation. It was first released in 2005.

• Clients: Vendor reports 5,000-plus active installations currently in over 25 countries

• Sustainability: CiviCRM is supported by foundation grants, revenue from paid consulting and training, conference sponsorships and community contributions. With a growing user-base and integrator ecosystem, the project’s funding stream is on very solid ground. The project core team includes 10 full-time engineers and project / product managers.
SofterWare still offers an installed version of DonorPerfect, but is encouraging new clients to move to its hosted system, DonorPerfect Online. We looked only at the online hosted version for this report. DonorPerfect has as strong a functionality as any system we reviewed in gift and donor tracking, prospecting, and support for accounting needs, and has a user-friendly interface that belies its significant power. The system is very configurable to meet specific processes, including custom fields, custom interactions, and the ability to delete or rename fields that aren’t helpful to you. DonorPerfect Online provides useful mail merge functionality, querying, and reporting. Broadcast email is handled through a strong integration with Constant Contact—organizations need to pay the subscription fee for the email service as well. The WebLink module is now included in the system and provides strong online payment functionality, while the optional WebLink Pro allows users to add custom fields to online forms—at additional cost. DonorPerfect supports volunteers and members and includes some events functionality—there’s also a new, free mobile app for users of the system. Pricing for DonorPerfect Online ranges from about $800 in the first year for one user license for the Express tier (which doesn’t include live telephone, email, or chat support) of the system with 1,000 records or less, up to about $5,379 in the first year for unlimited users, premium technical support, and up to 25,000 records.

Adding and Tracking Donations

- **Quick Search:** Lets you quickly search the database for an existing person from anywhere in the interface using a form that searches name and address information.
- **Quick Search on Custom Fields:** Lets you find a person by searching data entered into custom fields.
- **De-duping:** The system helps prevent duplicate entries when new people are entered by prompting you with a list of existing people with the same name or other criteria you can specify. You are also required to do a search before adding a new donor record. Users can run or schedule a duplicate checking report.
- **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.
- **Batching Gifts:** For ease of reconciling with accounting systems, each donation is automatically assigned to a batch when you process the donations that have not yet been receipted.
• **Gift Quick Entry Interface:** Lets you quickly enter a number of gifts at one time through a streamlined quick-entry interface which can be tailored on the fly with the appropriate fields and defaults for a particular set of gifts.

• **Updating Donor Info via Quick Entry:** The import and quick entry interface lets you automatically create new donors and updates donor contact information when appropriate.

• **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats. The Import module is included with DonorPerfect Online, but requires an additional cost for DonorPerfect Installed.

• **Adding Pledges:** Lets you enter pledges for future gifts, including the amount and scheduled date. The system can create a full set of pledges based on a payment schedule, which you can then customize as needed.

• **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, the system asks if you want to apply them against existing pledges.

• **Reminders for Pledges:** Lets you run a report to see pledges that are near due, but staff members are not proactively notified.

• **Matching Gifts:** Lets you track matching gifts that need to be claimed from an employer through a feature that can automatically create a pledge against the employer when you enter the gift to be matched.

• **Stock Gifts:** The system can track both the unsold and sold values of stock gifts.

• **Other Gift Types:** Supports tracking of tribute gifts, bequests, in-kind, or other gifts.

• **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign or fund, or split the gift across multiple of these, as well as to track the solicitation and sub-solicitation that generated a gift.

• **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like.

• **Gift Notes:** Lets you add freeform notes to a gift.

• **Attaching Documents to Gift or Activity Record:** The system lets a user upload and attach documents to gifts, activities, and/or proposals and stores them as part of the database.

• **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.

• **Zero Dollar Donations:** Lets you enter a gift with a zero dollar value for reporting purposes, as an in-kind gift. Lets you also record the asset value amount of the gift that’s tax deductible. You can also exclude zero-dollar donations from certain calculated fields.

• **Gifts “In Honor of” and Tributes:** Lets you track gifts given “in honor of,” and tributes, and schedule notifications—for instance, summary thank you letters—to the honorees.

• **Premiums:** Lets you assign and track premiums.

### Managing Donor Information

• **Multiple Contact Methods:** Lets you track as many phone numbers and addresses as you like, label them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method.

• **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings.

• **Seasonal Addresses:** Lets you track people’s seasonal addresses, with effective dates, and automatically switches primary addresses for the appropriate timeframe.

• **Do Not Contact:** Lets you display a field near the top of the donor screen to notify staff that a particular person should not be contacted.

• **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, “family member,” “co-worker”) with custom relationship types.

• **Bi-Directional Relationships:** Lets you define relationships between donors as one-way (“would like to meet”), two-way (“spouse”) or directional (“boss; works for...”), and automatically assigns the appropriate relationships for both donors.

• **Viewing Relationships:** Lets you easily view everyone with whom a donor has a relationship including the degrees of separation between everyone in the database.
• **Householding:** A database record describes a single individual and all their contact information and actions; you can connect them to others in their household through special relationships. You can define which addresses to share or not to share in relationships.

• **Staff Relationships:** Lets you track connections between donors and as many of your own staff members as you like, along with what staff member is responsible for the relationship.

• **Donor Notes:** Lets you query and report on freeform notes about donors.

• **Manual Communication Log:** Lets you keep a manual log of communications such as phone calls or personal meetings.

• **Automatic Communications Log:** Automatically stores a record of all system-generated letters and emails for each donor.

• **Donor Dashboard:** Lets you easily see all recent communications and donor actions on one screen. You can customize this screen to include the fields that are most important to you.

• **Giving Totals:** Lets you easily see in one click or less from the main donor page all recent gifts, the number and amount of gifts this year, and total giving.

• **Donor Source:** Lets you track the source of a particular donor.

• **Organizational Profile:** Lets you create a profile for an organization and track the people who work for it.

• **Deceased Donors:** Lets you record donors as deceased by checking a field. Deceased donors are excluded from mailings.

• **Online Integrated Data Cleaning and Appending:** Lets you link to WealthEngine or DonorSearch by passing donor information from the system. Data brought back into the system goes into fields separate from other system fields.

• **Mobile Support:** Lets you access constituent records and run reports from mobiles via an application designed specifically for mobile access.

• **Attaching Documents to Donor Record:** Lets you attach documents to the donor record and store them as part of the database. Attached documents can be included in searches and queries.

• **Ability to Track/Integrate Social Media Information with Donor Record:** Lets you record a donor’s social media links to fields in the donor record.

• **Ability to Track Donor Social Media Activities in the System:** Constituents’ organization-related social media activities can be captured in the system. Users can look up donors through Facebook or Twitter and pull information from their social media profiles into the system. Information imported from social media can be included in searches and queries.

### Prospecting and Proposals

• **Prospecting Workflow:** Lets you assign both a priority and a stage to a donor to manage a prospecting workflow. You can also create your own custom stages and track a donor's progression through them, with associated dates. In addition, DonorPerfect Online includes “SmartActions,” which lets you automate emails, message, update fields, and more based on system business rules.

• **Ticklers:** Lets you create a reminder for yourself for a particular task and date; shows the reminder prominently on the calendar or in a task list at the appropriate time.

• **Creating Ticklers for Others:** Lets you create a reminder for someone else to do a task on a particular date.

• **Donor Research:** Automatically matches donor information to outside resources in order to provide more information on giving capability and priority via partnerships with WealthEngine and DonorSearch. WealthEngine and DonorSearch integration requires an additional cost.

• **Reporting on Asks:** Lets you create reports that show all the asks that have been made, as well as the gifts.

• **Finding Your Prospects:** Lets you easily see the list of donors assigned to you as a solicitor by generating a segment.

• **Proposal Tracking:** Lets you track what proposals are due, what you’ve submitted and what has already been approved by a particular foundation.
• **Foundation Interest Tracking:** Lets you track a particular foundation’s interest areas based on your organization’s custom categories of interest.

• **Grant Tracking and Reporting:** Lets you track and report on grants separately from other donations, with customizable moves management processes for grant cultivation.

• **Thresholds and Action Triggers:** Lets you schedule reports to run on thresholds. Triggers can be configured via SmartActions.

### Permissions

- **Permissions:** You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.

- **Field Level Permissions:** Lets you define user or group permissions on a field-by-field basis and by query, allowing extremely detailed and granular access to specific data based on a saved query.

### Mail Merging Letters

- **General Mail Merge Approach:** Lets you create and save letter templates in Microsoft Word that include mail merged information. You can then mail merge data into those templates through the system without the need to export data.

- **Mail Merging on a Mac:** Does not support integrated mail merge on a Mac. However, using DonorPerfect Online, you could download a file and merge manually.

- **Flexibility of Letter and Thank You Templates:** Lets you flexibly create letter templates in Word with complete control over layout, formats, logos, and images.

- **Personalizing Letters:** Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.

- **Tracking That Letters Were Sent:** Automatically logs for each donor that a letter was sent.

- **One-off Thank Yous:** Lets you easily mail merge and print a single thank you letter from the gift entry interface.

- **Batch Processing of Thank Yous:** Lets you build a queue of people to be thanked by marking them at gift entry. You can then create letters for everyone in the queue at once.

- **Mail Merging Gift Strings:** Lets you create letters that include custom gift strings based on a donor’s previous giving history, using Microsoft Word’s formula functionality.

- **Creating One-Off Letters:** Lets you mail merge a single letter using your choice of letter templates from a donor record.

- **Defining Group to Mail:** Lets you print letters through the system for a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event).

- **Printing Labels:** Lets you easily print labels for a set of people from the same query result page used to print letters.

### Emailing

- **One-Off Email:** Lets you easily send email to particular individuals from their donor records.

- **Defining Group to Email:** Lets you send email through the system to a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event).

- **Merging Data into Emails:** Lets you create individual and group email that includes both standard text and “mail merge” type inserted data.

- **Merging Gift Strings into Email:** Lets you send emails that include custom gift strings based on a donor’s previous giving history.

- **Graphical Emails:** Lets you create and save graphical email templates to use in emailing groups.
• **Scheduling Emails:** Lets you schedule email to send in the future, but only in the Online edition.

• **Email Server:** Emails are sent via system-integrated Constant Contact, protecting you from blacklisting; Constant Contact takes measures to ensure email goes to donors’ inboxes rather than their spam filters.

• **Unsubscribes:** Donors can easily unsubscribe from emails without involving the organization in the online version, but not in the installed version.

• **Email Reports:** Lets you see the open rate, click-through rate and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports to allow you to follow up on email addressed that didn’t go through.

• **Automatic Emails:** Lets you set up automatic emails based on certain events via SmartActions.

### Querying

• **General Querying Approach:** Lets you create powerful queries with comparative ease by defining a series of criteria and filters. You can also define “exclusive not” queries—which exclude the results for one query from a different one. You can also write your own SQL queries if you like.

• **Querying Based on Giving:** Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts, and number of gifts this year compared to prior years.

• **Querying on Any Field:** Lets you query using criteria from any database field, including custom fields.

• **Complex Queries:** Lets you create complicated queries using an unlimited number of criteria connected with logical “ands” and “ors.” They provide particularly powerful yet easy to use functionality in this area—you can define “exclusive not” queries that exclude the results for one query from a different one.

• **Expanding Queries:** Lets you easily limit or expand a query after you’ve generated the list by editing the filters and criteria from your saved query. This is all done on one screen, reducing the complexity.

• **Saving Queries:** Lets you save queries to be run again later.

• **Taking Actions on a List:** Once you have created a list, you can mail merge letters to that list, email to that list, update most fields in the database for the list, or export the list.

• **Packaged Queries:** The system includes several dozen packaged queries.

### Reporting

• **Standard Reports:** Lets you easily generate prepackaged reports including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This One (LYBUNT) or donors from Some Year but Unfortunately Not This One (SYBUNT).

• **Giving Reports:** Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.

• **Comparing Campaign Success:** Lets you compare success metrics for a number of different campaigns, but you cannot see the cost of the campaigns.

• **Reporting on Pledges:** Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts.

• **Ad Hoc Reports:** Can create basic Ad Hoc reports by choosing what columns you want to include, and adding groups or totals. DonorPerfect Installed allows you to add a custom logo and header, but DonorPerfect Online does not.

• **Custom Fields in Ad Hoc Reports:** Custom fields can be displayed within Ad Hoc reports.

• **Saving Reports:** Lets you save the queries that you use to export data to create reports.

• **List of Favorite Reports:** Lets you quickly view favorite reports without navigating a much larger set.

• **Exporting Reports:** Lets you export reports to CSV, Excel, PDF, WORD, or Dbase format.

• **Distinguishing Reports:** The vendor would like to highlight their new “sidebar reports” feature, which lets users edit and update report filters on the fly from one screen.

• **Custom Reports:** Lets you create custom reports through a reports wizard.
• **Graphical Capabilities:** The system lets you add charts and graphs to reports, but your options are limited: just pie or bar charts.

• **Dashboard Placement:** Lets you place reports on a dashboard for quick viewing.

### Payment and Website Integration

• **Processing Credit Cards:** Lets you charge donors’ credit cards within the system.

• **Recurring Gifts:** Lets you set up recurring gifts which are both logged and charged to donors’ credit cards at designated intervals.

• **Web Signup Form:** People can easily sign up for your email list via an integrated signup form on your website. Web forms can be customized and branded by client via WYSIWYG editor, but HTML skills are required for detailed branding and navigation customization.

• **Online Payments:** Lets you set up an online payment form on your website and pull online payments automatically into your database. The vendor offers a complete form builder that allows you to create an unlimited number of forms and fully customize their fields and their position and order.

• **De-duping Online Actions:** Online signups or payments are logged to donors’ existing payment records by name or other contact information you can specify. These possible duplicates are presented for your confirmation before being logged in the system.

• **Event Registration:** Lets you accept online registration fees for events, including multiple ticket prices (such as a VIP ticket) and meal options.

• **Online Recurring Payments:** Lets donors set up recurring payments online (such as monthly donations) which are automatically charged to their credit cards, at additional cost.

• **Distributed/Team Fundraising:** Lets supporters set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts with an additional module at additional cost.

• **Membership Dues:** Lets members pay membership dues online using an included “Membership form” at no additional cost. In order to customize the membership form, the client will have to upgrade to WebLink Pro, at additional cost.

• **Shopping Cart:** Lets supporters purchase multiple items at once, as through a shopping cart.

• **Payment Form Customization:** Vendor provides an online payment form which can be customized to completely match your website.

• **Transaction Fees:** Vendor does not charge a transaction fee for each payment. You will need to set up your own merchant account, which will entail additional transaction fees.

• **Refunds:** Lets you easily issue refunds through the system.

• **Recurring Payments:** Lets donors set up recurring payment online via donor portal, at additional cost, using weblink module.

• **Mobile Giving:** There is no donor portal. Donors can make online donations via mobile phone.

• **Self Management of Donor Record:** Lets donors manage their own contact information online, but requires a module at additional cost.

### Tracking Other Interactions

• **Event Registrants:** Lets you track everyone who has registered for a particular event.

• **Tracking Guests:** Lets you track non-paying guests for particular events, and distinguish them from those who paid.

• **Table Details:** Lets you manage table details for an event, including seating arrangements, and the amount of gifts raised per table.

• **Nametags:** Lets you easily create nametags for an event via their standard mail merge process.

• **On-Site Registration:** Does not provide any specific functionality to support on-site registration outside of
creating a custom payment form that can be viewed on a mobile device. The vendor offers a free mobile payment app, as well as smartphone-compatible swipe hardware, for additional cost.

- **Volunteer Interests**: Lets you track one set of interests in order to match volunteers with jobs.
- **Volunteer Work Tracking**: Lets you log volunteer activity for supporters, including date, duration and tasks, but no dollar equivalent for their time.
- **Membership Tracking**: Provides functionality to track member levels, payments, and expiration dates.
- **Other Interactions**: In addition to the interactions we’ve covered here, the system offers supports “a-thon” events, product orders with inventory and fulfillment tracking, the ability for online donors to check if their employers will match gifts, and the ability for constituents to update their own information online.

**Customization**

- **Customizing Values**: Lets you customize drop-down values for fields such as campaigns, type of relationships, and many others.
- **Custom Fields**: Lets you add virtually an unlimited number of custom fields (up to 256 fields per database table, which equates to over 1,000 fields across the system), which can be placed on all data entry screens in the system.
- **Renaming Fields**: Lets you rename most, but not all, existing fields, at no additional cost.
- **Moving or Deleting Fields**: Lets you move all fields within the interface. Most, but not all, fields can be deleted altogether.
- **Custom Constituent Interactions**: Lets you create your own custom interactions, in order to track multiple pieces of data about a single interaction (for instance, to track date, title, and audience rating for the lectures delivered by your volunteers).
- **Vendor Customization**: Vendor will extensively customize system to your needs as part of the setup process. This customization is free for DonorPerfect Installed, or for DonorPerfect Online if you have fewer than 1,000 donor records. Otherwise, the customization is $95-$995 depending on which level you buy.
- **Access to Source Code**: Cannot access the source code in order to update or add functionality.

**Integration**

- **Existing Integrations**: Can automatically exchange data with WealthEngine, DonorSearch, Constant Contact, DonorShops and CampaignShops.
- **Data Export**: Lets you export all data visible to users into another file format, such as .XLS or .CSV.
- **Data Import**: Lets you map different files of donor and gift information to the proper fields in the system, and import the data. The Import module is included with DonorPerfect Online, but requires an additional cost for DonorPerfect Installed.
- **Programmatic Integration**: DonorPerfect Online offers a REST based API that offers both import/export calls to all data objects and elements within the program. The DonorPerfect Online Premier level includes the API at no charge, (otherwise it is $348 per year).

**Accounting Support**

- **Existing Integrations**: Lets you create a file format tailored to upload easily into QuickBooks, MiP, and a few other systems, with an additional module at additional cost.
- **Approach to Batching**: Lets you create batches of payments in order to ease the reconciliation process with an accounting system, including separate batches for checks, cash, and credit payments.
- **Reconciling a Batch**: Cannot mark a batch of payments as “reconciled with accounting.” You can mark records as being passed to accounting, but this is not quite reconciliation.
- **Controlling Reconciled Donations**: There is an optional setting that disables the ability to edit a gift after the gift has been processed in a batch. Alternatively, you could restrict the group of people who can edit reconciled donations, or prohibit it altogether, using the (complex) advanced permissions functionality.
Ease of Use

• **Ease of Use for Novices:** Moderate. The system has a lot of different options and features, but since the vendor will configure it to better match your terminology and workflow on setup, the learning curve is decreased a bit.

• **Speed for Expert Users:** Easy. Experts can design the custom fields and placement to tailor them to their own workflows, and there are a number of quick data entry options. The query building tool provides a lot of control once you’ve learned how to use it.

Support and Training

• **Training:** Vendor provides free recorded webinar training, and includes optional paid training either via the internet or live.

• **Manuals and Documentation:** Provides full written documentation, a training video library, and a forum area for users to ask questions of other users.

• **Support:** Provides an online help section from which you can sign up for trainings. Live phone, email, and chat support available starting at $228 per year for the first 10 concurrent users.

Installation and Maintenance

• **Installation and Maintenance:** As is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain, as the vendor takes care of the infrastructure and updates. [The vendor also offers a version of the system which is installed on your desktop.]

Product Background

• **History:** Vendor has been in business since 1981. DonorPerfect Installed has been in use by clients since 1986; DonorPerfect Online has been in use since 2001.

• **Clients:** Vendor reports 6,000 clients for the online version of DonorPerfect, and 4,000 for the installed version.

• **Sustainability:** The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.
DonorPro has strong functionality in every category we reviewed. It’s particularly strong in support for pledges, accounting controls, mail merging, and reporting (it includes a very nice ad hoc report writer as well as standard reports). The vendors of DonorPro have recently rolled out a new user interface that’s optimized for mobile and quite usable, with a particularly friendly tool for generating queries and sophisticated capabilities around batch gift entry, including a nice check scanning module. Email marketing capability is provided through an integration with Constant Contact, which allows users to track and get detailed reports on broadcast email. The system has powerful quick search capability, including phonetic searching to compensate for spelling errors, and this capability now includes searching for data in custom fields. Included modules provide support for events and membership management. In addition, the system provides functionality for human resources functions, inventory management, and patient services, which will be of particular interest to those in the health and human services sector. There have been significant updates to this system since our 2011 report.

Adding and Tracking Donations

• **Quick Search:** Lets you quickly search the database for an existing person or organization from anywhere in the interface using a form that searches first name, last name, address, email, phone number, and groups, among other fields. It includes a Soundex search so that correct spelling isn’t critical.

• **Quick Search on Custom Fields:** Lets you find a person or organization by searching data entered into custom fields.

• **De-duping:** The system helps prevent duplicate entries when new people are entered by requiring you to search for a person before entering a donation.

• **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.

• **Batching Gifts:** For ease of reconciling with accounting systems, each donation must be entered as part of a defined batch by associating a batch name with the gift.

• **Gift Quick Entry Interface:** Lets you quickly enter a number of gifts at one time through a streamlined quick entry interface. The interface will automatically default many of the fields values to those used for the previous gift; however, this interface cannot be tailored on the fly with the appropriate set of fields for a particular set of gifts.
• **Updating Donor Info via Quick Entry:** The quick entry interface lets you automatically create new donors and updates donor contact information when appropriate.

• **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats.

• **Adding Pledges:** Lets you enter pledges for future gifts, including the amount and scheduled date. The system can create a full set of pledges based on a payment schedule, which you can then customize as needed.

• **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, the system asks if you want to apply them against existing pledges.

• **Reminders for Pledges:** Lets you run a report to see pledges that are near due, or you can manually set a reminder to be proactively notified about a pledge.

• **Matching Gifts:** Lets you track matching gifts that need to be claimed from an employer through a matching gift relationship.

• **Stock Gifts:** The system can track the symbol, number of shares, and current unsold value of stock gifts. Up-to-date stock quotes can be obtained by including a link to the stock on Yahoo Finance.

• **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, and in-kind gifts.

• **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign, fund, or “class.” You can split the gift across multiple funds, campaigns, and “classes” but not sources.

• **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like.

• **Gift Notes:** Lets you add freeform notes to a gift.

• **Attaching Documents to Gift or Activity Record:** The system lets a user upload and attach documents to gifts, activities, and/or proposals and stores them as part of the database.

• **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.

• **Zero Dollar Donations:** The system records the value of goods, services, and other in-kind gifts.

• **Gifts “In Honor of” and Tributes:** Lets you see donations made as tributes or “in honor of” via a tab on the donor information screen. You have to pick a fund to enter these gift types. Provides access to receipts and thank you letters from donation screen.

• **Premiums:** Lets you assign premiums with donations via an “assign incentive” button. The system can assign premiums based on gift amount, and can calculate tax deductibility of premiums for receipts.

### Managing Donor Information

• **Multiple Contact Methods:** Lets you track as many phone numbers, mailing addresses, and email addresses as you like, label them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method.

• **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings using “correspondence reasons.”

• **Seasonal Addresses:** Lets you track people’s seasonal addresses, with effective dates, and automatically switches primary addresses for the appropriate timeframe.

• **Do Not Contact:** Lets you mark that a particular person should not be contacted. This excludes donors from direct mail and email, but staff must look at a particular field on the record to know not to call the donor.

• **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, “family member,” “co-worker”) with custom relationship types.

• **Bi-Directional Relationships:** Lets you define relationships between donors as one-way (“would like to meet”), two-way (“spouse”) or directional (“boss; works for...”), and automatically assigns the appropriate relationships for both donors.

• **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships.

• **Householding:** A database record describes a single individual and all their contact information and actions; you can connect them to others in their household through special relationships. You can see individual giving and other household members on individual profile but must create a query to see a total of household giving.
• **Staff Relationships**: Lets you track connections between donors and as many of your own staff members as you like, along with what staff member is responsible for the relationship.

• **Donor Notes**: Lets you query and report on freeform notes about donors.

• **Manual Communication Log**: Lets you keep a manual log of communications such as phone calls or personal meetings. The log includes a timer, which may be useful for organizations that track development time.

• **Automatic Communications Log**: Automatically stores a record of all system-generated letters and emails for each donor.

• **Donor Dashboard**: Lets you easily see all recent communications and donor actions on one screen.

• **Giving Totals**: Lets you easily see in one click or less from the main donor page all recent gifts, the number and amount of gifts this year, and total giving.

• **Donor Source**: Lets you track the source of a particular donor.

• **Organizational Profile**: Lets you create a profile for an organization and track the people who work for it.

• **Deceased Donors**: Lets you record donors as deceased, along with their date of death. Deceased donors are color coded on the constituents list. Another option must be checked to exclude deceased donors from mailings. Can set up custom post-mortem tasks and workflow with reminders.

• **Online Integrated Data Cleaning and Appending**: Lets you click a link on a donor profile to view WealthEngine or NCOA information. External data can be uploaded to DonorPro in a batch using the included Advanced Import Module.

• **Mobile Support**: Lets you access constituent records from mobiles via a mobile web browser. The system uses responsive design to adapt to mobile web browsers.

• **Attaching Documents to Donor Record**: Lets you attach documents to the donor record. Attached documents are stored as part of the database.

• **Ability to Track/Integrate Social Media Information with Donor Record**: Lets you record a donor’s social media links to contact fields in the system.

• **Ability to Track Donor Social Media Activities in the System**: Does not meet this criteria.

### Prospecting and Proposals

• **Prospecting Workflow**: Lets you assign both a priority and a stage to a donor to manage a prospecting workflow. A “cultivation management” feature also allows you to track stages, priorities, and dates in a way that will robustly support a number of different prospecting workflows.

• **Ticklers**: Lets you create a reminder for yourself for a particular task and date; shows the reminder in reports

• **Creating Ticklers for Others**: Lets you create a reminder for someone else to do a task on a particular date.

• **Donor Research**: Automatically matches donor information to outside resources in order to provide more information on giving capability and priority via a partnership with WealthEngine.

• **Reporting on Asks**: Lets you create reports that show all the asks that have been made, as well as the gifts.

• **Finding Your Prospects**: Lets you easily see the list of donors assigned to you as a solicitor by a segmentation report.

• **Proposal Tracking**: Lets you track what proposals are due, what you’ve submitted and what has already been approved by a particular foundation.

• **Foundation Interest Tracking**: Cannot track a particular foundation’s interest areas based on your organization’s custom categories of interest without using custom fields.

• **Grant Tracking and Reporting**: Lets you track and report on grants separately from other donations, with customizable moves management processes for grant cultivation.

• **Thresholds and Action Triggers**: Lets you set up tasks to remind you of next actions for donors.
Permissions

- **Permissions**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field Level Permissions**: Lets you define granular user access on a field-by-field basis to a group of key system fields.

Mail Merging Letters

- **General Mail Merge Approach**: Lets you create and save letter templates within the system, and then mail merge to them without the need for any other system. Allows you to create more flexible letter templates for use in the system via Open Office.
- **Mail Merging on a Mac**: Lets you mail merge letters on a Mac using the system’s built in word processor or externally using the Open Office word processor.
- **Flexibility of Letter and Thank You Templates**: Lets you flexibly create letter templates with complete control over layout, formats, logos, and images. Their built in word processor is not quite as powerful as Word, but it’s solid.
- **Personalizing Letters**: Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.
- **Tracking That Letters Were Sent**: Automatically logs for each donor that a letter was sent when you confirm that a batch of letters were printed.
- **One-off Thank Yous**: Lets you easily mail merge and print a single thank you letter from the gift entry interface by choosing from a number of letter templates.
- **Batch Processing of Thank Yous**: Lets you build a queue of people to be thanked by marking them at gift entry. You can then create letters for everyone in the queue at once.
- **Mail Merging Gift Strings**: Lets you create letters that include custom gift strings based on a donor’s previous giving history.
- **Creating One-Off Letters**: Lets you mail merge a single letter using your choice of letter templates from a donor record.
- **Defining Group to Mail**: Lets you print letters through the system for a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event).
- **Printing Labels**: Lets you easily print labels for a set of people from the same query result page used to print letters. This functionality is better integrated than many other tools reviewed.

Emailing

- **One-Off Email**: Lets you easily send email to particular individuals from their donor records.
- **Defining Group to Email**: Lets you send email through the system to a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event). They provide two mechanisms for this: an internal functionality and an integration with Constant Contact.
- **Merging Data into Emails**: Lets you create individual and group email that includes both standard text and “mail merge” type inserted data.
- **Merging Gift Strings into Email**: Lets you send emails that include custom gift strings based on a donor’s previous giving history.
- **Graphical Emails**: Lets you create and save graphical email templates to use in emailing groups.
- **Scheduling Emails**: Lets you schedule email to send in the future via integrated Constant Contact.
- **Email Server**: If you use the Constant Contact integration, emails are sent via system-integrated Constant Contact, protecting you from blacklisting; Constant Contact takes measures to ensure email goes to donors’ inboxes rather than their spam filters.
• **Unsubscribes**: Donors can easily unsubscribe from emails without involving the organization.

• **Email Reports**: Lets you see the open rate, click-through rate and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports to allow you to follow up on email addressed that didn't go through.

• **Automatic Emails**: Lets you set up automatic emails in response to Web form submissions.

### Querying

• **General Querying Approach**: Lets you create powerful queries with comparative ease, by choosing criteria from a well organized interface.

• **Querying Based on Giving**: Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts, and number of gifts this year compared to prior years.

• **Querying on Any Field**: Lets you query using criteria from any database field, including custom fields.

• **Complex Queries**: Lets you create complicated queries using an unlimited number of criteria connected with logical “ands” and “ors.” They provide particularly powerful yet comparatively easy to use functionality in this area—you can define “exclusive not” queries that exclude the results for one query from a different one.

• **Expanding Queries**: Lets you easily limit or expand a query after you’ve generated the list by saving the query and editing it again.

• **Saving Queries**: Lets you save queries to be run again later.

• **Taking Actions on a List**: Once you have created a list, you can mail merge letters to that list, email to that list, update any field in the database for the list, delete the entire list, add notes to that list, or export the list.

• **Packaged Queries**: The system includes several packaged queries.

### Reporting

• **Standard Reports**: Lets you easily generate prepackaged reports including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This One (LYBUNT) or donors from Some Year but Unfortunately Not This One (SYBUNT).

• **Giving Reports**: Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.

• **Comparing Campaign Success**: Lets you compare success metrics for a number of different campaigns, but you cannot see the cost of the campaigns.

• **Reporting on Pledges**: Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts. They provide a particularly strong “Cultivation Report” which allows you to see the details for your major donors, grants, or any other prospecting process.

• **Ad Hoc Reports**: Supports Ad Hoc reports within the system which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, and grouping. You can also add logos and headers, if you know HTML scripting language.

• **Custom Fields in Ad Hoc Reports**: Custom fields can be displayed within Ad Hoc reports.

• **Saving Reports**: Lets you save reports that you create or modify.

• **List of Favorite Reports**: Lets you quickly view favorite reports without navigating a much larger set.

• **Exporting Reports**: Lets you export reports to CSV formats, among others.

• **Distinguishing Reports**: The vendor highlights their Pledge Drive (to support fundraising telethons), Shift Schedule (for employees and volunteers), Missed Event, Giving Level, and Cultivation/Forecast reports as distinguishing features from other systems.

• **Custom Reports**: Lets you create custom reports through a reports wizard in the internal word processor.

• **Graphical Capabilities**: Does not let you add charts and graphs to reports.

• **Dashboard Placement**: Lets you place reports and graphs on the user dashboard.
Payment and Website Integration

- **Processing Credit Cards**: Lets you charge donors’ credit cards within the system.
- **Recurring Gifts**: Lets you set up recurring gifts which are both logged and charged to donors’ credit cards at designated intervals. You can also do this for pledges, with a similar functionality.
- **Web Signup Form**: People can easily sign up for your email list via an integrated signup form on your website. Web forms can be customized and branded by client via WYSIWYG editor, but HTML skills required for detailed branding and navigation customization.
- **Online Payments**: Lets you set up an online payment form on your website and pull online payments automatically into your database.
- **De-duping Online Actions**: Online signups or payments are logged to donors’ existing payment records by matching the name.
- **Event Registration**: Lets you accept online registration fees for events, including multiple ticket prices (such as a VIP ticket) and meal options.
- **Online Recurring Payments**: Lets donors set up recurring payments online (such as monthly donations) which are automatically charged to their credit cards.
- **Distributed/Team Fundraising**: Lets supports set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts.
- **Membership Dues**: Lets members pay membership dues online.
- **Shopping Cart**: Lets supporters purchase multiple items at once, as through a shopping cart.
- **Payment Form Customization**: Vendor provides an online payment form which can be somewhat customized to match your website’s colors and fonts, but not your website navigation. You’ll need someone with technical expertise to completely match your website navigation. The vendor will customize forms to completely match your website at additional cost.
- **Transaction Fees**: Vendor supports a number of online merchant accounts. Users can choose to use the vendor’s services, which charges 2.89 percent plus $0.20 per transaction.
- **Refunds**: You must issue refunds through the merchant account, and then log the refund into the system manually.
- **Recurring Payments**: Donors can set up recurring payments to your organization from an online interface.
- **Mobile Giving**: Can access the donor portal via mobile phones.
- **Self Management of Donor Record**: Lets donors manage their own contact information online.

Tracking Other Interactions

- **Event Registrants**: Lets you track everyone who has registered for a particular event.
- **Tracking Guests**: Lets you track non-paying guests for particular events, and distinguish them from those who paid.
- **Table Details**: Lets you manage table details for an event, including names of table captains, seating arrangements, and the amount of gifts raised per table.
- **Nametags**: Lets you create nametags for an event via their standard mail merge process.
- **On-Site Registration**: Provides a “Day of Event” registration screen optimized for quick entry of walk up registrants.
- **Volunteer Interests**: Lets you track a detailed profile of someone’s interests and aptitudes, including several different types of information, in order to match volunteers to jobs.
- **Volunteer Work Tracking**: Lets you log volunteer activity for supporters, including date, duration and tasks, as well as the dollar equivalent for their time.
- **Membership Tracking**: Provides functionality to track member levels, payments, and expiration dates.
- **Other Interactions**: In addition to the interactions we’ve covered here, the system offers support for auctions, recruitment, inventory management, a community and legal aid service module, and a patient services module to securely track information such as diagnoses, medications, and contacts. An optional mobile marketing module can provide support for text-to-give fundraising campaigns, at additional cost.
Customization

- **Customizing Values**: Lets you customize all system drop-down values, for fields such as campaigns, type of relationships, and many others.
- **Custom Fields**: Lets you add an unlimited number of custom fields, which can be placed on most screens in the system.
- **Renaming Fields**: Cannot rename existing fields.
- **Moving or Deleting Fields**: Lets you move or hide certain specific constituent fields within the interface, including race, religion, and Social Security Number.
- **Custom Constituent Interactions**: Lets you create your own custom interactions, in order to track multiple pieces of data about a single interaction (for instance, to track date, title, and audience rating for the lectures delivered by your volunteers), using the Forms functionality.
- **Vendor Customization**: Vendor will customize system to your needs at additional cost, but doesn’t often do so.
- **Access to Source Code**: Cannot access the source code in order to update or add functionality.

Integration

- **Existing Integrations**: Can automatically exchange data with Constant Contact and ShowClix (for ticketing through events module).
- **Data Export**: Lets you export all data visible to users into another file format, such as .XLS or .CSV.
- **Data Import**: Lets you map different files of donor and gift information to the proper fields in the system, and import the data. Can do a batch import for the system install, and update information in real-time using the DonorPro API.
- **Programmatic Integration**: Provides an API to all tables in the system to allow a programmer to create custom data feeds to an external system.

Accounting Support

- **Existing Integrations**: Lets you create file formats tailored to upload easily into QuickBooks, MiP, Quicken, MAS 90, Jenzabar, and Peachtree.
- **Approach to Batching**: Lets you create batches of payments in order to ease the reconciliation process with an accounting system, including separate batches for checks, cash, and credit payments.
- **Reconciling a Batch**: Lets you mark a batch of payments as “reconciled with accounting.”
- **Controlling Reconciled Donations**: A payment can be edited after reconciliation by those with appropriate permissions, by unposting the batch.

Ease of Use

- **Ease of Use for Novices**: Moderate. The layout is well organized and generally fairly understandable. However, it’s a complex system, and it will take some time to learn.
- **Speed for Expert Users**: Easy. Once you have mastered the system, it becomes quite quick to use. Terminology is easy to understand, and the system provides a fair amount of functionality to optimize time consuming tasks, like data entry.

Support and Training

- **Training**: Vendor provides initial training via the internet at no additional cost, and additional training sessions can be scheduled at additional cost. Training videos are available without cost.
- **Manuals and Documentation**: Provides context sensitive text throughout the application, as well as a written and online manual. Recorded webinars are also available without charge.
- **Support**: Vendor provides unlimited phone or email support without additional cost.
Installation and Maintenance

- **Installation and Maintenance:** As is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain, as the vendor takes care of the infrastructure and updates.

Product Background

- **History:** Vendor has been in business since 2002; DonorPro package has also been in use by clients since 2003.
- **Clients:** Vendor reports over 800 clients for this particular package.
- **Sustainability:** The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.
eTapestry is designed to be the lower-cost alternative donor management system to The Raiser’s Edge from Blackbaud. The system provides useful and affordable functionality for small organizations, and is scalable as an organization’s needs evolve (although at considerable additional cost). The base product provides strong gift- and donor-tracking functionality, as well as reasonable email, mail merged letter, and reporting functionality. Querying is complex and somewhat confusing (you must remember to set a “category base” when designing one, for instance). The system is very configurable—in addition to adding custom fields or deleting existing fields, you can add configurable “Journal” entries which allow you to track multiple linked fields and would be quite useful to track contacts with constituents (for instance, a date, a category and a rating for the same interaction). Many system functionalities require an additional charge, however—for instance, the Personal Fundraising and eStore add-ons require additional fees. There are a lot of features and options in the system, and some terminology may not be intuitive to all users (“Persona” to define a household contact record, for instance) making it more complex to use than many we reviewed. The vendors draw some of the ideas for updates to the system from a crowdsourced roadmap from their users. The price varies greatly depending on the features you add and the number of donors you store. For the most basic edition of the software, a nonprofit with fewer than 1,000 records that sent fewer than 25,000 broadcast emails per year would pay $1,188 annually. For a more-sophisticated edition of the software, but without add-ons, a nonprofit with 20,000 records that sent fewer than 100,000 emails per year would pay $5,964 annually. There have been major updates have been made to this system since our 2011 report.

Adding and Tracking Donations

• **Quick Search:** Lets you quickly search the database for an existing person from anywhere in the interface using a single keyword field, or a form that searches basic contact information including email.

• **Quick Search on Custom Fields:** Lets you find a person by searching data entered into custom fields.

• **De-duping:** The system helps prevent duplicate entries when new people are entered by prompting you with a list of existing people that match an algorithm based on name, address, and email fields. This is optional; you can turn off the duplicate checking. Users can run or schedule a duplicate checking report.
• **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.

• **Batching Gifts:** The system does not group donations into batches for reconciliation with accounting systems.

• **Gift Quick Entry Interface:** Lets you quickly enter a number of gifts or other transaction types at one time through a streamlined quick-entry interface which can be tailored on the fly with the appropriate fields and defaults for a particular set of gifts.

• **Updating Donor Info via Quick Entry:** The quick entry interface lets you automatically create new donors and updates donor contact information when appropriate.

• **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats. The mapping information can be saved and reused.

• **Adding Pledges:** Lets you enter pledges for future gifts, including the amount and scheduled date. The system can create a full set of pledges based on a payment schedule, which you can then customize as needed.

• **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, the system asks if you want to apply them against existing pledges. In addition, everyone is notified with a little paperclip icon next to the donor name and red pledge text when a pledge exists.

• **Reminders for Pledges:** Can flexibly configure the system to notify the appropriate staff member(s) with a reminder or via email when a pledge is near due.

• **Matching Gifts:** Lets you track matching gifts that need to be claimed from an employer through a two-step process. You first define the matching relationship, including the match gift ratio. When you then add the donation, the match amount will be automatically created as pledge for the matching organization. This is a bit awkward to setup a first match, but is stored for future gifts from this donor.

• **Stock Gifts:** The system can track the sold value of stock gifts, but not the unsold value.

• **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, and in-kind and stock gifts. The system is quite configurable to support additional gift types.

• **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign or fund, or split the gift across multiple of these. Robust functionality in this area allows you to “segment” a gift – to split it into multiple linked records, with each gift having a separate campaign, fund, appeal, etc.

• **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like. However, assigning credit to multiple people can only be done through a separate “Segmented Transaction” screen.

• **Gift Notes:** Lets you add freeform notes to a gift.

• **Attaching Documents to Gift or Activity Record:** The system lets a user upload and attach documents to gifts, activities, and/or proposals and stores them as part of the database

• **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.

• **Zero Dollar Donations:** Lets you enter a gift with a zero dollar value for reporting purposes, as an in-kind gift.

• **Gifts “In Honor of” and Tributes:** Lets you record gifts given “in tribute to” as a specific gift type. Fields are provided for tribute description, with other tribute values stored in user defined fields.

• **Premiums:** Lets you assign and track premiums and record tax deductible amount. Can record premium characteristics in user defined fields. Can set premiums by membership level via the shopping cart.

### Managing Donor Information

• **Multiple Contact Methods:** Lets you track as many phone numbers and addresses as you like, label them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method.

• **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings.

• **Seasonal Addresses:** Lets you track people’s seasonal addresses, with effective dates, and automatically switches primary addresses for the appropriate timeframe.

• **Do Not Contact:** Lets you display a very prominent message in a colored Post It to notify staff that a particular person should not be contacted. You can also mark a person as “do not contact” in their mailing status field.
• **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, “family member,” “co-worker”) with custom relationship types.

• **Bi-Directional Relationships:** Lets you define relationships between donors as two-way (“spouse”) or directional (“boss; works for...”), but not one way, and automatically assigns the proper relationships for each.

• **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships.

• **Householding:** A database record describes a single individual and all their contact information and actions; you can connect them to others in their household through special relationships. You can split a household and manage decisions about where to attribute gifts.

• **Staff Relationships:** Lets you track connections between donors and as many of your own staff members as you like, along with what staff member is responsible for the relationship.

• **Donor Notes:** Lets you query and report on free form notes about donors.

• **Manual Communication Log:** Lets you keep a manual log of communications such as phone calls or personal meetings.

• **Automatic Communications Log:** Automatically stores a record of all system-generated letters and emails for each donor.

• **Donor Dashboard:** Lets you easily see all recent communications and donor actions on one screen. You can customize this screen to include the fields that are most important to you.

• **Giving Totals:** Lets you easily see in one click or less from the main donor page all recent gifts, the number and amount of gifts this year, and total giving. You can configure this screen to choose the lists and aggregate stats that are most useful to you.

• **Donor Source:** Lets you track the source of a particular donor.

• **Organizational Profile:** Lets you create a profile for an organization and track the people who work for it.

• **Deceased Donors:** Lets you record donors as deceased by checking a field. Deceased donors are excluded from mailings.

• **Online Integrated Data Cleaning and Appending:** Integrates with USPS for address validation.

• **Mobile Support:** Lets you access constituent records from mobiles via a mobile web browser.

• **Attaching Documents to Donor Record:** Lets you attach documents to the donor record. Attached documents are stored as part of the database.

• **Ability to Track/Integrate Social Media Information with Donor Record:** Lets you track social media information with the donor record using custom fields.

• **Ability to Track Donor Social Media Activities in the System:** Constituent organization-related social media activities can be captured in the system through a partnership with Constant Contact.

### Prospecting and Proposals

• **Prospecting Workflow:** Lets you assign both a priority and a stage to a donor to manage a prospecting workflow. In addition, there is fairly advanced built-in functionality to manage major gift and capital campaigns.

• **Ticklers:** Lets you create a reminder for yourself for a particular task and date; shows the reminder at the appropriate time. Ticklers can be exported to iCal or Outlook formats.

• **Creating Ticklers for Others:** Lets you create a reminder for someone else to do a task on a particular date. You have a number of options here—you can assign a task to your organization as a whole, to one or more people, or to a “query” of people based on how they are related to other info in the system.

• **Donor Research:** Automatically matches donor information to outside resources in order to provide more information on giving capability and priority—at additional cost. They provide a number of strong options in this area, but none are included in the base package.

• **Reporting on Asks:** Lets you create reports that show all the asks that have been made, as well as the gifts.

• **Finding Your Prospects:** Lets you easily see the list of donors assigned to you as a solicitor by running a query.

• **Proposal Tracking:** Lets you track what proposals are due, what you’ve submitted and what has already been approved by a particular foundation.
Foundation Interest Tracking: Lets you track a particular foundation’s interest areas based on your organization’s custom categories of interest.

Grant Tracking and Reporting: Lets you track and report on grants separately from other gifts; can record grant probabilities, request and award amounts, payment types, and deliverables. Can record due dates and reminders for grants and assign them to any staff member with customizable moves management processes for grant cultivation.

Thresholds and Action Triggers: Lets you schedule reports to run on thresholds. No automatic threshold-triggered actions.

Permissions

Permissions: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.

Field Level Permissions: Lets you define user or group permissions on a field-by-field basis and by query, allowing extremely detailed and granular access to specific data based on a saved query.

Mail Merging Letters

General Mail Merge Approach: Lets you create and save letter templates within the system, and then mail merge to them without the need for any other system.

Mail Merging on a Mac: Lets you mail merge letters on a Mac using the system’s built-in word processor.

Flexibility of Letter and Thank You Templates: Lets you flexibly create letter templates with complete control over layout, formats, logos, and images using their built-in word processor.

Personalizing Letters: Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.

Tracking That Letters Were Sent: Automatically logs for each donor that a letter was sent when you confirm that a batch of letters were printed.

One-off Thank Yous: Lets you easily mail merge and print a single thank you letter from the gift entry interface by choosing from a number of letter templates.

Batch Processing of Thank Yous: Lets you build a queue of people to be thanked by marking them at gift entry. You can then create letters for everyone in the queue at once.

Mail Merging Gift Strings: Lets you create letters that include custom gift strings based on a donor’s previous giving history, using a built-in template.

Creating One-Off Letters: Lets you mail merge a single letter using your choice of letter templates from a donor record.

Defining Group to Mail: Lets you print letters through the system for a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event).

Printing Labels: Lets you easily print labels for a set of people from the same query result page used to print letters. This functionality is better integrated than many other tools reviewed.

Emailing

One-Off Email: Lets you easily send email to particular individuals from their donor records.

Defining Group to Email: Lets you send email through the system to a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event).

Merging Data into Emails: Lets you create individual and group email that includes both standard text and “mail merge” type inserted data.

Merging Gift Strings into Email: Lets you send emails that include custom gift strings based on a donor’s previous giving history, using a built-in template.
• **Graphical Emails**: Lets you create and save graphical email templates to use in emailing groups.
• **Scheduling Emails**: Lets you schedule email to send in the future.
• **Email Server**: Emails are sent through the vendor's email server, protecting you from blacklisting issues, and the vendor takes a series of steps to ensure email goes to donors’ inboxes rather than their spam filters. Additionally, clients can integrate the system with Constant Contact.
• **Unsubscribes**: Donors can easily unsubscribe from emails without involving the organization.
• **Email Reports**: Lets you see the open rate, click-through rate and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports to allow you to follow up on email addresses that didn't go through.
• **Automatic Emails**: Lets you set up automatic emails based on certain events. For example, you can schedule an email based on a criteria built in the query interface, to email any new donors added in the past week.

**Querying**

• **General Querying Approach**: Lets you create powerful queries with comparative ease. Many queries can be done on one screen, and you choose from all the fields, or set limits up front to reduce the clutter and choices.
• **Querying Based on Giving**: Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts, and number of gifts this year compared to prior years.
• **Querying on Any Field**: Lets you query using criteria from any database field, including custom fields.
• **Complex Queries**: Lets you create complicated queries using an unlimited number of criteria connected with logical “ands” and “ors.”
• **Expanding Queries**: Lets you easily limit or expand a query after you’ve generated the list by saving the query and editing it again.
• **Saving Queries**: Lets you save queries to be run again later. Saved and favorited queries can be easily found from the user homepage.
• **Taking Actions on a List**: Once you have created a list, you can mail merge letters to that list, email to that list, update most fields in the database for the list, or export the list.
• **Packaged Queries**: The system includes several packaged queries.

**Reporting**

• **Standard Reports**: Lets you easily generate prepackaged reports including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This One (LYBUNT) or donors from Some Year but Unfortunately Not This One (SYBUNT).
• **Giving Reports**: Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.
• **Comparing Campaign Success**: Lets you compare success metrics for a number of different campaigns in one report, including the donations compared to the cost of the campaigns.
• **Reporting on Pledges**: Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts.
• **Ad Hoc Reports**: Can create very basic Ad Hoc reports by choosing what columns you want to include, and adding groups or totals. You cannot add a logo, header or other look/feel enhancements.
• **Custom Fields in Ad Hoc Reports**: Custom fields can be displayed within Ad Hoc reports.
• **Saving Reports**: Lets you save the queries that you use to export data to create reports.
• **List of Favorite Reports**: Lets you quickly view favorite reports without navigating a much larger set.
• **Exporting Reports**: Lets you export reports to CSV, Excel, or PDF formats, among others.
• **Distinguishing Reports**: The vendor highlights the included Benchmark and Giving Dynamics reports, which provide organization-wide fundraising statistics and comparisons, as distinguishing from other systems.
• **Custom Reports**: Lets you create custom reports through a reports wizard in the internal word processor.
• **Graphical Capabilities:** The system lets you add charts and graphs to reports, but only on the included “Executive Reports”.
• **Dashboard Placement:** Lets you place reports and dynamic charts and graphs on the dashboard. The dashboard layout is easily customizable.

**Payment and Website Integration**

• **Processing Credit Cards:** Lets you charge donors’ credit cards within the system.
• **Recurring Gifts:** Lets you set up recurring gifts which are both logged and charged to donors’ credit cards at designated intervals.
• **Web Signup Form:** People can easily sign up for your email list via an integrated signup form on your website. Web forms can be customized and branded by client via WYSIWYG editor, but HTML skills required for detailed branding and navigation customization. Alternatively, forms can be embedded into a page on your website. A maximum of 10 forms can be active at any time.
• **Online Payments:** Lets you set up an online payment form on your website and pull online payments automatically into your database.
• **De-duping Online Actions:** Online signups or payments are logged to donors’ existing payment records, matching by name and email address. Users can also run a duplicate report for on-demand manual de-duping.
• **Event Registration:** Lets you accept online registration fees for events.
• **Online Recurring Payments:** Lets donors set up recurring payments online (such as monthly donations) which are automatically charged to their credit cards.
• **Distributed/Team Fundraising:** Lets supporters set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts, using Blackbaud’s Team-Raiser tool, which is available at additional cost.
• **Membership Dues:** Lets members pay membership dues online.
• **Shopping Cart:** Lets supporters purchase multiple items at once, as through a shopping cart, with an optional Shopping Cart module at additional charge. Can include a questionnaire as part of the checkout process.
• **Payment Form Customization:** Vendor provides an online payment form which can be customized to match your website’s navigation, colors, and fonts. Users can create and save as many forms as they want, but up to 10 can be active at any time.
• **Transaction Fees:** eTapestry includes Blackbaud Merchant Services (BBMS) which provides payment processing at a single rate of 2.59 percent plus $0.24 per transaction. Other merchant services can be used as well.
• **Refunds:** You must issue refunds through the merchant account, and then log the refund into the system manually.
• **Recurring Payments:** Lets donors set up recurring payments online (such as monthly donations), which are automatically charged to their credit cards.
• **Mobile Giving:** Can access the donor portal via mobile phones.
• **Self Management of Donor Record:** Lets donors manage their own contact information online, but requires a module at additional cost.

**Tracking Other Interactions**

• **Event Registrants:** Lets you track everyone who has registered for a particular event.
• **Tracking Guests:** Lets you track non-paying guests for particular events, and distinguish them from those who paid.
• **Table Details:** Cannot manage any table details for an event, such as names of table captains, seating arrangements or the amount of gifts raised per table unless you configure this using custom fields in the Journal.
• **Namaetags:** Lets you create nametags for an event via their standard mail merge process.
• **On-Site Registration:** Can quickly mark those attending as having arrived using the Quick Gift Entry tool.
• **Volunteer Interests:** Lets you track a detailed profile of someone’s interests and aptitudes, including several different types of information, in order to match volunteers to jobs.

• **Volunteer Work Tracking:** Lets you log volunteer activity for supporters, including date, duration and tasks, as well as the dollar equivalent for their time.

• **Membership Tracking:** Provides functionality to track member levels, payments, and expiration dates.

• **Other Interactions:** In addition to the interactions we’ve covered here, the system offers support for “a-thon” events, donor wish lists, and donor loyalty surveys. Donors can also log in to update their own information.

**Customization**

• **Customizing Values:** Lets you customize drop-down values for fields such as campaigns, type of relationships, and many others.

• **Custom Fields:** Lets you add an unlimited number of custom fields, which can be placed on most screens in the system.

• **Renaming Fields:** Lets you rename existing fields at no additional cost.

• **Moving or Deleting Fields:** Lets you move many fields within the interface, or delete them altogether.

• **Custom Constituent Interactions:** Lets you create your own custom interactions, in order to track multiple pieces of data about a single interaction (for instance, to track date, title, and audience rating for the lectures delivered by your volunteers), using the Journal functionality.

• **Vendor Customization:** Vendor will extensively customize system to your needs, at additional cost. Vendor recommends that clients first contact technical support for guidance on customizing the systems themselves, at no additional cost.

• **Access to Source Code:** Cannot access the source code in order to update or add functionality.

**Integration**

• **Existing Integrations:** Can automatically exchange data with Benevon, Target Analytics, Greater Giving, PG-Calc/Crescendo, Quickbooks, Walker Information, all at additional cost. Integration with the Fundraising Effectiveness Project, AuctionMaestro, and Volunteer Hub is now included at no additional cost.

• **Data Export:** Lets you export all data visible to users into another file format, such as .PDF, .XLS, or .CSV.

• **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data.

• **Programmatic Integration:** Provides an API to allow a programmer to create custom data feeds to an external system. This API does not require an additional cost.

**Accounting Support**

• **Existing Integrations:** Lets you create a file format tailored to upload easily into QuickBooks, MiP, Fund Accounting, and about 10 other common systems.

• **Approach to Batching:** Does not help you to create batches of payments per se, to ease the reconciliation process with an accounting system. You can create a query and run an export, but these gifts are not marked as part of a specific batch.

• **Reconciling a Batch:** Lets you mark a batch of payments as “final,” which prevents it from being edited by anyone other than the system supervisor.

• **Controlling Reconciled Donations:** By default, there are no controls in place to prevent someone from editing a payment that has already been reconciled, and thus throwing the system out of balance with the accounting system. However, you can mark a transaction as “final,” either gift-by-gift or by updating through a query, which prevents it from being edited by anyone other than the system supervisor. The last user editing the gift is tracked, and you could restrict the group of people who can edit reconciled donations, or prohibit it altogether, using the (complex) advanced permissions functionality.
Ease of Use

- **Ease of Use for Novices**: Moderate. The layout is well organized and generally fairly understandable. However, it’s a complex system, and it will take some time to learn.
- **Speed for Expert Users**: Moderate. The system is not optimally laid out to speed repetitive tasks, although it provides special functionality for some, such as gift data entry. The vendor has improved the loading time of pages in the system since the last report.

Support and Training

- **Training**: Vendor provides initial training via the internet at no additional cost. Additional training sessions and training videos are available without cost.
- **Manuals and Documentation**: Provides an online library with videos and written documents.
- **Support**: Vendor provides unlimited email and instant message support at no additional cost. Unlimited phone support is available at additional cost.

Installation and Maintenance

- **Installation and Maintenance**: As is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain, as the vendor takes care of the infrastructure, connectivity to the internet, and updates.

Product Background

- **History**: The eTapestry package has been in use by clients for about 14 years.
- **Clients**: Vendor reports over 11,000 clients for this particular package.
- **Sustainability**: The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.
GiftWorks is a very friendly and polished system that offers impressive functionality for smaller organizations. It provides useful gift tracking and donor management functionality, with a nice “dashboard” of all your interactions with a donor. Emailing, mail merging, querying, reporting, and accounting controls are also solid. Online donations are available through a new integration with FirstGiving, at no additional cost, and broadcast email functionality is included, with additional functionality possible through integration with Constant Contact or MailChimp. While the base product is limited in its support for interactions for on-line donations, broadcast email functionality is included and an add-on module provides basic online donation functionality. The Premium version adds support for seasonal addresses, different user roles, and additional custom fields. The system is full of wizards and features to make it easy for you to find what you need, but these same features may slow-down an advanced user somewhat, and no advanced ad-hoc reporting tools are included. The system also allows users to search for donors phonetically, and enter large numbers of gifts through a quick-entry interface. GiftWorks Standard starts at $1,080 per year for unlimited users and up to 1,000 donor records; the Premium edition starts at $1,680 per year for up to 2,000 records. The Pro edition can support up to 25,000 donor records for $4,188 per year. The Volunteer and Event modules are now included with all pricing tiers. GiftWorks Anywhere, the company’s online, hosted solution, starts at $1,320 per user per year, and includes the SmartPlan support package. Email support is free; unlimited phone support is available as part of the required SmartPlan, for $468 per year.

Adding and Tracking Donations

- **Quick Search**: Lets you quickly search the database for an existing person from anywhere in the interface using a form that searches first and last name. Phonetic search capability allows you to find donors when exact spelling is not known.
- **Quick Search on Custom Fields**: Lets you find a person by searching data entered into custom fields.
- **De-duping**: The system helps prevent duplicate entries when new people are entered by prompting you with a list of existing people with the same name.
- **Adding a Gift**: Adding a single gift into the system is a straightforward process of finding a donor and filling out fields. This is a very easy, intuitive process.
- **Batching Gifts**: For ease of reconciling with accounting...
systems, gifts are associated with a batch after entry. To define the batch, you query to find a group of gifts, save it as a “transaction” and post it, in order to output it to QuickBooks or a CSV format for a date range.

- **Gift Quick Entry Interface**: Lets you quickly enter a number of gifts at one time through a streamlined quick entry interface.

- **Updating Donor Info via Quick Entry**: The quick entry interface lets you automatically create new donors and updates donor contact information when appropriate.

- **Importing Gifts**: Lets you easily map and import donor and gift information in custom file formats. The mapping information can be saved and reused.

- **Adding a Pledge**: Lets you enter pledges for future gifts, including the amount and scheduled date. The system can create a full set of pledges based on a payment schedule, which you can then customize as needed.

- **Viewing Pledges on Gift Entry**: When using the interface to add new gifts, the system asks if you want to apply them against existing pledges.

- **Reminders for Pledges**: Lets you run a report to see pledges that are near due, but staff members are not proactively notified. Outstanding pledge payments are displayed in the “Past Due Payments” section of the user dashboard.

- **Matching Gifts**: Lets you track matching gifts that need to be claimed from an employer through a special type of relationship called a “matching gift relationship.” The pledge is automatically added to the matching donor’s record.

- **Stock Gifts**: The system can track the value of stock gifts at acquisition, but not the sold value.

- **Other Gift Types**: Supports tracking of tribute gifts, bequeathments, in-kind gifts (including a description of the gift and value), and restricted donations.

- **Campaigns or Funds**: Lets you assign gifts to a particular source, campaign or fund, or split the gift across multiple of these.

- **Tracking Credit for Gifts**: Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like. Can make appear as if it were given by someone by crediting from the donor of record, without double-counting. Not the same as solicitor credit.

- **Gift Notes**: Lets you add freeform notes to a gift, as well as a “task” with a date, topic and campaign information associated with it.

- **Attaching Documents to Gift or Activity Record**: The system does not let you upload and attach documents to gifts, activities, and/or proposals.

- **Organizational Gifts**: Lets you associate gifts with an organization as opposed to individuals.

- **Zero Dollar Donations**: Lets you enter a gift with a zero dollar value for reporting purposes, as an in-kind gift. Lets you enter select the form of the gift (e.g. bedding, furniture, etc) via an in-kind category dropdown for sub-options.

- **Gifts “In Honor of” and Tributes**: Lets you track gifts given “in honor of,” and tributes as specific gift types, and schedule notifications—for instance, summary thank you letters—to the honorees.

- **Premiums**: Lets you assign premiums but provides only limited functionality for tracking and managing them.

**Managing Donor Information**

- **Multiple Contact Methods**: Lets you track as many phone numbers and addresses as you like, label them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method.

- **Multiple Addresses**: Does not let you specify which address should be used for certain types of mailings.

- **Seasonal Addresses**: Lets you track people’s seasonal addresses, with effective dates, and automatically switches primary addresses for the appropriate timeframe, but only in the Premium version.

- **Do Not Contact**: Lets you mark that a particular person should not be contacted (by mail, email or phone). System logic then excludes them from email and mail queries.

- **Relationships Between Donors**: Lets you track relationships between donors, and label them (for example, “family member,” “co-worker”) with custom relationship types.
• **Bi-Directional Relationships:** Lets you define relationships between donors as one-way (“would like to meet”), two-way (“spouse”) or directional (“boss; works for...”), and automatically assigns the appropriate relationships for both donors.

• **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships.

• **Householding:** A database record can describe an entire household—individuals can be listed on that record with a minimal amount of name and contact info. Alternatively, individuals can be listed as separate records with all their contact information and actions; you can connect them to others in their household through special relationships.

• **Staff Relationships:** Lets you track connections between donors and as many of your own staff members as you like, along with what staff member is responsible for the relationship.

• **Donor Notes:** A large text area lets you enter and view free form notes about donors.

• **Manual Communication Log:** Lets you keep a manual log of communications such as phone calls or personal meetings.

• **Automatic Communications Log:** Automatically stores a record of all system-generated letters and emails for each donor.

• **Donor Dashboard:** Lets you easily see all recent communications and donor actions on one screen.

• **Giving Totals:** Lets you easily see in one click or less from the main donor page all recent gifts, the number and amount of gifts this year, and total giving.

• **Donor Source:** Lets you track the source of a particular donor.

• **Organizational Profile:** Lets you create a profile for an organization and track the people who work for it.

• **Deceased Donors:** Lets you record donors as deceased by checking a field. Deceased donors are excluded from mailings.

• **Online Integrated Data Cleaning and Appending:** No functionality for online integrated data cleaning and appending.

• **Mobile Support:** The installed system has no support for mobile devices. The online version lets you access constituent records via a mobile web browser, but is not customized to make records easy to use on a mobile browser.

• **Attaching Documents to Donor Record:** Lets you attach documents to the donor record and store them as part of the database.

• **Ability to Track/Integrate Social Media Information with Donor Record:** Lets you record a donor’s social media links to fields in the donor record.

• **Ability to Track Donor Social Media Activities in the System:** Constituents’ organization-related social media activities can be captured in the system.

**Prospecting and Proposals**

• **Prospecting Workflow:** Lets you assign both a priority and a stage to a donor to manage a prospecting workflow. You could also configure “Tasks” to track a date for when a donor reached a particular stage, but it would be difficult to view all these entries together in a particular order as an integrated look at a process.

• **Ticklers:** Lets you create a reminder for yourself for a particular task and date; shows the reminder prominently in the Notes & Tasks screen. You can assign it to yourself, view your calendar to see all reminders, print it, or see a list of reminders by day.

• **Creating Ticklers for Others:** Lets you create a reminder for someone else to do a task on a particular date.

• **Donor Research:** Does not provide any functionality to automatically match donor information to outside resources in order to provide more information on giving capability and priority.

• **Reporting on Asks:** Lets you create reports that show all the asks that have been made, as well as the gifts.

• **Finding Your Prospects:** Lets you easily see the list of donors assigned to you as a solicitor by running a query.

• **Proposal Tracking:** Lets you track what proposals are due, what you’ve submitted and what has already been approved by a particular foundation.
• **Foundation Interest Tracking:** Lets you track a particular foundation’s interest areas based on your organization’s custom categories of interest.

• **Grant Tracking and Reporting:** Lets you track and report on grants separately from other gifts; can record due dates and reminders for grants and assign them to any staff member.

• **Thresholds and Action Triggers:** No special functionality to support thresholds and action triggers.

### Permissions

• **Permissions:** Standard package has only a single level of permissions for the whole system. GiftWorks Premium, Pro, and Anywhere let you grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.

• **Field Level Permissions:** Cannot define user or group permissions on a field-by-field basis.

### Mail Merging Letters

• **General Mail Merge Approach:** Lets you create and save letter templates within the system, and then mail merge to them without the need for any other system.

• **Mail Merging on a Mac:** Cannot mail merge letters on a Mac using the installed system, as this is a PC based system. If you are using the GiftWorks Anywhere hosted application, you can mail merge on a Mac.

• **Flexibility of Letter and Thank You Templates:** Lets you create template with some control over format, logos, and images.

• **Personalizing Letters:** Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.

• **Tracking That Letters Were Sent:** Automatically logs for each donor that a letter was sent when you confirm that a batch of letters were printed.

• **One-off Thank Yous:** Lets you easily mail merge and print a single thank you letter from the gift entry interface by choosing from a number of letter templates.

• **Batch Processing of Thank Yous:** Lets you build a queue of people to be thanked by marking them at gift entry. You can then create letters for everyone in the queue at once.

• **Mail Merging Gift Strings:** Lets you create letters that include custom gift strings based on a donor’s previous giving history.

• **Creating One-Off Letters:** Lets you mail merge a single letter using your choice of letter templates from a donor record.

• **Defining Group to Mail:** Lets you print letters through the system for a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event).

• **Printing Labels:** Lets you easily print labels (standard Avery or full custom) for a set of people from the same query result page used to print letters.

### Emailing

• **One-Off Email:** Lets you easily send email to particular individuals from their donor records.

• **Defining Group to Email:** Lets you send email through the system to a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event).

• **Merging Data into Emails:** Lets you create individual and group email that includes both standard text and “mail merge” type inserted data.

• **Merging Gift Strings into Email:** Lets you send emails that include custom gift strings based on a donor’s previous giving history, using SmartFields.

• **Graphical Emails:** Lets you create and save graphical email templates to use in emailing groups.

• **Scheduling Emails:** Cannot schedule email to send in the future.
Email Server: Emails are sent via your own email server or any SMTP server. This approach incurs a greater risk that your own email domain will be blacklisted. Alternatively, emails can be sent via a system-integrated third-party broadcast email client (Constant Contact or MailChimp), protecting you from blacklisting; the third-party email client takes measures to ensure email goes to donors’ inboxes rather than their spam filters.

Unsubscribes: Donors can easily unsubscribe from emails without involving the organization if the system is integrated with Constant Contact or MailChimp.

Email Reports: Lets you see the open rate, click-through rate and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports to allow you to follow up on email addressed that didn’t go through, through an integration with Constant Contact or MailChimp.

Automatic Emails: Cannot set up automatic emails based on certain events, like a web form submission.

Querying

General Querying Approach: Lets you create powerful queries with comparative ease by choosing criteria from a well organized interface.

Querying Based on Giving: Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts, and number of gifts this year compared to prior years.

Querying on Any Field: Lets you query using criteria from any database field, including custom fields.

Complex Queries: Lets you create complicated queries using an unlimited number of criteria connected with logical “ands” and “ors.”

Expanding Queries: Lets you easily limit or expand a query after you’ve generated the list by saving the query and editing it again.

Saving Queries: Lets you save queries to be run again later.

Taking Actions on a List: Once you have created a list, you can mail merge letters to that list, email to that list, update most fields in the database for the list, export the list, or map the list.

Packaged Queries: The system includes several packaged queries, as part of their SmartList functionality.

Reporting

Standard Reports: Lets you easily generate prepackaged reports including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This One (LYBUNT) or donors from Some Year but Unfortunately Not This One (SYBUNT).

Giving Reports: Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.

Comparing Campaign Success: Lets you compare success metrics for a number of different campaigns in one report, including the donations compared to the cost of the campaigns.

Reporting on Pledges: Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts.

Ad Hoc Reports: Can create very basic Ad Hoc reports by choosing what columns you want to include, and adding groups or totals. You cannot add a logo, header or other look/feel enhancements.

Custom Fields in Ad Hoc Reports: Custom fields can be exported to use to create Ad Hoc reports outside the system.

Saving Reports: Lets you save the queries that you use to export data to create reports.

List of Favorite Reports: Lets you quickly view favorite reports without navigating a much larger set.

Exporting Reports: Lets you export reports to Excel, .CSV or QuickBooks formats.

Distinguishing Reports: The vendor highlights the flexibility of their customizable standard reports, as well as the simplicity of adding charts or graphs to any report, as distinguishing features.

Custom Reports: Lets you create custom reports through a reports wizard.

Graphical Capabilities: The system lets you add charts and graphs to reports, but your options are limited.

Dashboard Placement: Lets you place reports on the dashboard.
Payment and Website Integration

- **Processing Credit Cards:** Lets you charge donors’ credit cards within the system.
- **Recurring Gifts:** Lets you set up recurring gifts which are both logged and charged to donors’ credit cards at designated intervals.
- **Web Signup Form:** People can easily sign up for your email list via an integrated signup widget that can be placed on your website, using the additional WebCollect service at additional cost. Alternatively, you could set up this functionality if using a third-party broadcast email client like MailChimp or Constant Contact.
- **Online Payments:** Lets you set up an online payment form on your website and pull online payments automatically into your database.
- **De-duping Online Actions:** The interface that you use to proof the list of online payments matches donors by first, last, and middle name and organization, and shows you potential duplicates.
- **Event Registration:** Lets you accept online registration fees for events, through FirstGiving, at additional cost.
- **Online Recurring Payments:** Lets donors set up recurring payments online (such as monthly donations) which are automatically charged to their credit cards.
- **Distributed/Team Fundraising:** Lets supporters set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts with FirstGiving, at additional cost.
- **Membership Dues:** Lets members pay membership dues online.
- **Shopping Cart:** At the time of review, the system does not support multiple purchases at the same time.
- **Payment Form Customization:** Vendor provides an online payment form which can be somewhat customized to match your website’s colors and fonts, but not your website navigation.
- **Transaction Fees:** Vendor charges a transaction fee of 4.25 percent for online donations and credit card transactions processed within the system.
- **Refunds:** Refunds within the system are handled by contacting the Customer Care team.
- **Mobile Giving:** Can access donation pages via a mobile device.
- **Self-Management of Donor Record:** Does not allow donors to manage their own contact information online.

Tracking Other Interactions

- **Event Registrants:** Lets you track everyone who has registered for a particular event, in addition to invitations, who actually attended, and sponsors.
- **Tracking Guests:** Lets you track non-paying guests for particular events, and distinguish them from those who paid.
- **Table Details:** Lets you manage table details for an event, including seating arrangements, and the amount of gifts raised per table.
- **Nametags:** Lets you easily create nametags for an event via their label generator.
- **On-Site Registration:** Does not provide any specific functionality to support on-site registration.
- **Volunteer Interests:** Lets you track a detailed profile of someone’s interests and aptitudes, including several different types of information, in order to match volunteers to jobs.
- **Volunteer Work Tracking:** Lets you log volunteer activity for supporters, including date, duration and tasks, but no dollar equivalent for their time.
- **Membership Tracking:** Provides functionality to track multiple membership programs, member levels, payments, expiration dates, and benefits.
- **Other Interactions:** Does not provide built-in support for any constituent interactions other than what has been covered in this report.
Customization
- **Customizing Values:** Lets you customize drop-down values for fields such as campaigns, type of relationships, and many others. You can change list values for most fields, including the order of the list.
- **Custom Fields:** Lets you add up to 56 custom fields with the Standard package, or up to 150 with the Premium package—half on the donor screen, half on the gift entry screen.
- **Renaming Fields:** Cannot rename existing fields.
- **Moving or Deleting Fields:** Cannot move or delete existing fields.
- **Custom Constituent Interactions:** Lets you create your own custom interactions, in order to track multiple pieces of data about a single interaction (for instance, to track date, title, and audience rating for the lectures delivered by your volunteers), using their Notes and Tasks functionality.
- **Vendor Customization:** Vendor does not customize the system.
- **Access to Source Code:** Cannot access the source code in order to update or add functionality.

Integration
- **Existing Integrations:** Can automatically exchange data with the United States Postal Service Change of Address Service, broadcast email clients (including Constant Contact and MailChimp), and can sync tasks with Google Calendar, Windows Live Calendar, or Microsoft Outlook.
- **Data Export:** Lets you export all data visible to users into another file format, such as .XLS or .CSV.
- **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data. Can do a batch import for the system install, and an “incremental” import for subsequent jobs that adds de-duplication functionality.
- **Programmatic Integration:** The vendor provides scripts to allow a programmer to create custom data feeds of donation and donor information to an external system, but this is not a robust API functionality.

Accounting Support
- **Existing Integrations:** Lets you automatically synchronize data with QuickBooks.
- **Approach to Batching:** Lets you create batches of payments in order to ease the reconciliation process with an accounting system, including separate batches for checks, cash, and credit payments.
- **Reconciling a Batch:** Lets you mark a batch of payments as “reconciled with accounting.”
- **Controlling Reconciled Donations:** There are no controls in place to prevent someone from editing a payment that has already been reconciled. However, the edit would create a void and new transaction on the transaction register, to be synched to your accounting system.

Ease of Use
- **Ease of Use for Novices:** Easy. The system is carefully designed to be free of clutter, and easy to understand. There are easy step-by-step wizards, searches and quick lists for many features.
- **Speed for Expert Users:** Moderate. The system is optimized around the needs of novice users, and while all are likely to find it intuitive, experienced development directors may wish for more flexibility and shortcuts to ease repetitive tasks.

Support and Training
- **Training:** Vendor provides online training, either via the internet or live, at additional cost. Training videos are available without cost.
- **Manuals and Documentation:** Provides help text throughout the application, as well as an online help section, manual, and recorded trainings.
- **Support:** Vendor provides unlimited email support without additional cost; $39 per month includes phone support for one to three users, training, and software updates.
Installation and Maintenance

- **Installation and Maintenance:** As is typical with an installed system, you will need to install the system to your desktops, maintain your own infrastructure, and install your own updates. If you are using their hosted system, the system will be comparatively easy to get up and running and to maintain, as the vendor takes care of the infrastructure, connectivity to the internet, and updates.

Product Background

- **History:** GiftWorks has been in business since 2002 and has been actively used by customers since 2004.
- **Clients:** Vendor reports between 9,000 and 10,000 clients.
- **Sustainability:** The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.
Little Green Light’s pedigree in the school fundraising field shows through in the power and ease of use of core donor management system functions, and the system’s functionality has been greatly expanded in recent years. Simple workflows for the entry and retrieval of donor information, strong search capabilities and a clean screen layout contribute to this product’s approachability, a critical factor for systems used frequently by occasional users and volunteers who lack the time to devote to mastering a complex system. Little Green Light now also has integration with MailChimp and Constant Contact as well as built-in broadcast email capability, can process payments through an integration with PayPal, and integrates with Form Stack and Wufoo for online forms. The system can also manage basic volunteer data, and handles gifts and their acknowledgements quite ably. Batch gift entry still relies on importing of external spreadsheets, but there’s also a nice quick-entry interface. The vendors have also added some standard reports that can be exported to .pdf, and ad-hoc reporting is straightforward. Customization is somewhat limited—you need to ask the vendor to add or hide fields. Little Green Light also has a new pricing structure: Organizations with less than 2,500 constituents pay $468 annually on a monthly basis, with a discount for a lump annual payment. A larger nonprofit with 20,000 records would pay $828 annually on a monthly basis, with a discount for a lump annual payment. There are modest implementation fees, and support is included. The system has undergone major upgrades since our 2011 report.

Adding and Tracking Donations

• **Quick Search:** Lets you quickly search the database for an existing person or organization from anywhere in the interface using a form that searches first name, last name, address, and groups. It includes a loose name search, so that correct spelling isn't critical.

• **Quick Search on Custom Fields:** Lets you find a person or organization by searching data entered into custom fields.

• **De-duping:** The system helps prevent duplicate entries when new people are entered by prompting you with a list of existing people with the same name or other criteria you can specify. The system also encourages you to do a search before adding a new donor record.

• **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields. This is a very easy, intuitive process.
- **Batching Gifts:** For ease of reconciling with accounting systems, each donation is automatically assigned to a batch when you process the donations that have not yet been receipted.

- **Gift Quick Entry Interface:** Lets you quickly enter a number of gifts at one time through a streamlined quick entry interface. You can tailor the defaults for a particular set of gifts, but you can’t change the fields on the fly. Defaulted values can be overridden individually.

- **Updating Donor Info via Quick Entry:** The import and quick entry interface lets you automatically create new donors and updates donor contact information when appropriate.

- **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats. The mapping information can be saved and reused.

- **Adding a Pledge:** Lets you enter pledges for future gifts, including the amount and scheduled date. The system can create a full set of pledges based on a payment schedule, which you can then customize as needed. It will also automatically adjust the payment schedule as needed if a pledge is overpaid or underpaid.

- **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, you can easily see existing pledges and apply gifts against them, but you are not specifically asked to do so.

- **Reminders for Pledges:** Can flexibly configure the system to notify the appropriate staff member(s) with a reminder or via email when a pledge is near due.

- **Matching Gifts:** Lets you track matching gifts that need to be claimed from an employer through a matching record on each new gift entry. This tracks the matching amount and whether the match has been paid.

- **Stock Gifts:** The system can track the sold value of stock gifts, but not the unsold value.

- **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, in-kind, or other gifts.

- **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign or fund, or split the gift across multiple of these, as well as to track the solicitation and sub-solicitation that generated a gift.

- **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like. Can make appear as if it were given by someone by crediting from the donor record, without double-counting. Not the same as solicitor credit.

- **Gift Notes:** The system lets you add freeform notes to a gift. These notes can be queried and reported on.

- **Attaching Documents to Gift or Activity Record:** The system lets a user upload and attach documents to gifts, activities, and/or proposals and stores them as part of the database

- **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.

- **Zero Dollar Donations:** The system records the value of goods, services, and other in-kind gifts.

- **Gifts “In Honor of” and Tributes:** Lets you track gifts given “in honor of,” and tributes through soft credits only. Can generate letters to honorees.

- **Premiums:** Lets you assign and track premiums and record tax deductible amount.

### Managing Donor Information

- **Multiple Contact Methods:** Lets you track as many phone numbers and addresses as you like, label them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method.

- **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings.

- **Seasonal Addresses:** Lets you track people’s seasonal addresses, with effective dates, and automatically switches primary addresses for the appropriate timeframe.

- **Do Not Contact:** Lets you display a field near the top of the donor screen to notify staff that a particular person should not be contacted.

- **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, “family member,” “co-worker”) with custom relationship types.

- **Bi-Directional Relationships:** Lets you define relationships between donors as one-way (“would like to meet”), two-way (“spouse”) or directional (“boss; works for...”), and automatically assigns the appropriate relationships for both donors.
• **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships.

• **Householding:** A database record describes a single individual and all their contact information and actions; you can connect them to others in their household through special relationships. You can define which addresses to share or not to share in relationships.

• **Staff Relationships:** Lets you track connections between donors and as many of your own staff members as you like, along with what staff member is responsible for the relationship.

• **Donor Notes:** A large text area lets you enter and view free form notes about donors. You can click on a note to get a more detailed view of it. The system also provides the ability to upload documents for any donor.

• **Manual Communication Log:** Lets you keep a manual log of communications such as phone calls or personal meetings. Manual communication logs are included in system queries and reports.

• **Automatic Communications Log:** Automatically stores a record of all system-generated letters and emails for each donor. Emails generated outside the system can be recorded by emailing them to the system (for example, bcc-ing a unique system email address on emails).

• **Donor Dashboard:** Lets you easily see all recent communications and donor actions on one screen—although a particularly long screen.

• **Giving Totals:** Lets you easily see all recent gifts in one click or less from the main donor page. You can drill down from that page to see the number and amount of gifts this year, or total giving.

• **Donor Source:** Lets you track the source of a particular donor through custom fields only.

• **Organizational Profile:** Lets you create a profile for an organization and track the people who work for it.

• **Deceased Donors:** Lets you record donors as deceased. Deceased donors are color-coded on the constituents list, but this coding does not carry over to the rest of the system. The system has a deceased date field that records the date of death for deceased donors.

• **Online Integrated Data Cleaning and Appending:** Lets you link to SmartyStreets, a free address verification service, by passing donor information from the system. Data brought back into the system goes into fields separate from other system fields. Lets you link to WealthEngine by passing donor information from the system to this resource. Since the integration is one-way, any data will have to be manually imported into the system.

• **Mobile Support:** Lets you access constituent records from mobiles via a mobile web browser. The system is not customized for mobile web browsers.

• **Attaching Documents to Donor Record:** Lets you attach documents to the donor record and store them as part of the database.

• **Ability to Track/Integrate Social Media Information with Donor Record:** Lets you track website URLs in the donor record.

• **Ability to Track Donor Social Media Activities in the System:** Does not meet this criteria.

### Prospecting and Proposals

• **Prospecting Workflow:** Lets you assign a stage to a donor to manage a prospecting workflow. You can also create your own custom stages and track a donor’s progression through them, with associated dates. Priorities can only be assigned and tracked as a custom category.

• **Ticklers:** Lets you create a reminder for yourself for a particular task and date. Shows the reminder in reports. Shows the reminder prominently on the calendar or in a task list at the appropriate time. Shows the reminder prominently on the homepage along with what is overdue, due, and other filters. Shows the reminder prominently on startup of the application. Can optionally email you a reminder.

• **Creating Ticklers for Others:** Lets you create a reminder for someone else to do a task on a particular date. You have a number of options here—you can assign a task to your organization as a whole, to one or more people, or to a “query” of people based on how they are related to other info in the system.

• **Donor Research:** Lets you link to WealthEngine by passing donor information from the system to this resource in order to provide more information on giving capability and priority. Since the integration is one-way, any data will have to be manually imported into the system.

• **Reporting on Asks:** Lets you create reports that show all the asks that have been made, as well as the gifts.
- **Finding Your Prospects**: Lets you easily see the list of donors assigned to you as a solicitor by running a segmentation report.

- **Proposal Tracking**: Lets you track what proposals are due, what you’ve submitted and what has already been approved by a particular foundation using custom fields.

- **Foundation Interest Tracking**: Cannot track a particular foundation’s interest areas based on your organization’s custom categories of interest without using custom fields.

- **Grant Tracking and Reporting**: Lets you track and report on grants separately from other gifts; can record grant probabilities, request and award amounts, payment types, and deliverables. Can record due dates and reminders for grants and assign them to any staff member.

- **Thresholds and Action Triggers**: No special functionality to support thresholds and action triggers.

**Permissions**

- **Permissions**: You can grant groups access at a functional level for a wide variety of system functions.

- **Field Level Permissions**: Cannot define user or group permissions on a field-by-field basis.

**Mail Merging Letters**

- **General Mail Merge Approach**: Lets you create and save letter templates in Microsoft Word that include mail merged information. You can then mail merge data into those templates through the system without the need to export data.

- **Mail Merging on a Mac**: Lets you mail merge letters on a Mac.

- **Flexibility of Letter and Thank You Templates**: Lets you create template in the built-in word processor with some control over format, logos, and images, but your ability to create unusual layouts is limited. Lets you flexibly create letter templates in Word with complete control over layout, formats, logos, and images.

- **Personalizing Letters**: Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.

- **Tracking That Letters Were Sent**: Automatically logs for each donor that a letter was sent.

- **One-off Thank Yous**: Lets you easily mail merge and print a single thank you letter from the gift entry interface by choosing from a number of letter templates.

- **Batch Processing of Thank Yous**: Automatically creates a queue of people to be thanked as part of the gift entry process. You can then create letters for everyone in the queue at once.

- **Mail Merging Gift Strings**: Lets you create letters that include custom gift strings based on a donor’s previous giving history. There a number of built-in “formulas” that you can use to control conditional output like gift strings or conditional text.

- **Creating One-Off Letters**: Lets you mail merge a single letter using your choice of letter templates from a donor record.

- **Defining Group to Mail**: Lets you print letters through the system for a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event).

- **Printing Labels**: Lets you easily print labels for a set of people from the same query result page used to print letters. This functionality is better integrated than many other tools reviewed.

**Emailing**

- **One-Off Email**: Lets you easily send email to particular individuals from their donor records and from the network view of relationships to that donor. The system automatically logs the email and saves a copy as part of the donor record.

- **Defining Group to Email**: Lets you send email through the system to a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event).
• **Merging Data into Emails:** Lets you create individual and group email that includes both standard text and “mail merge” type inserted data. The system uses the same mail merging tool for email as it does for printed letters, with a few additional email options (specify from/to address for instance).

• **Merging Gift Strings into Email:** Lets you send emails that include custom gift strings based on a donor’s previous giving history using the same formulas and merge fields as it does for printed letters.

• **Graphical Emails:** Lets you create and save graphical email templates to use in emailing groups.

• **Scheduling Emails:** Cannot schedule email to send in the future.

• **Email Server:** Emails are sent via a system-integrated third-party broadcast email client, protecting you from blacklist; the third-party broadcast email client takes measures to ensure email goes to donors' inboxes rather than their spam filters.

• **Unsubscribes:** Donors can easily unsubscribe from emails without involving the organization if the organization uses a third-party broadcast email client. Otherwise, donors must contact the organization to unsubscribe from future mailings.

• **Email Reports:** Does not provide any reports to help you understand how many opens or clicks an email generated. Advanced email reports may be available if using a third-party broadcast email client.

• **Automatic Emails:** Cannot set up automatic emails based on certain events, like a web form submission. Web form submissions will add an acknowledgement email to the daily queue, however.

### Querying

• **General Querying Approach:** Lets you create powerful queries with comparative ease by defining a series of criteria and filters. You can also define “exclusive not” queries—which exclude the results for one query from a different one.

• **Querying Based on Giving:** Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts, and number of gifts this year compared to prior years.

• **Querying on Any Field:** Lets you query using criteria from any database field, including custom fields.

• **Complex Queries:** Lets you create complicated queries using an unlimited number of criteria connected with logical “ands” and “ors.”

• **Expanding Queries:** Lets you easily limit or expand a query after you’ve generated the list by editing the query and making changes as required.

• **Saving Queries:** Lets you save queries to be run again later.

• **Taking Actions on a List:** Once you have created a list, you can mail merge letters to that list, email to that list, update any field in the database for the list, or export the list.

• **Packaged Queries:** Includes the package queries underlying the standard reports.

### Reporting

• **Standard Reports:** Lets you easily generate prepackaged reports including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This One (LYBUNT) or donors from Some Year but Unfortunately Not This One (SYBUNT).

• **Giving Reports:** Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.

• **Comparing Campaign Success:** Lets you compare success metrics for a number of different campaigns, but you cannot see the cost of the campaigns.

• **Reporting on Pledges:** Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts.

• **Ad Hoc Reports:** Can create basic Ad Hoc reports by choosing what columns you want to include, and adding groups or totals.

• **Custom Fields in Ad Hoc Reports:** Custom fields can be displayed within Ad Hoc reports.

• **Saving Reports:** Lets you save the queries that you use to export data to create reports.
• **List of Favorite Reports:** Does not meet this criteria.

• **Exporting Reports:** Lets you export reports to CSV or PDF format.

• **Distinguishing Reports:** The vendor highlights the ability to interact with real-time report results prior to export, the ability to schedule reports to run at daily/weekly/monthly intervals, and their phone-a-thon call sheet reports as distinguishing from other systems.

• **Custom Reports:** Lets you create custom reports through a reports wizard with four steps.

• **Graphical Capabilities:** Does not let you add charts and graphs to reports.

• **Dashboard Placement:** Does not let you add reports to the dashboard.

### Payment and Website Integration

• **Processing Credit Cards:** Lets you charge donors’ credit cards by entering them into an online form which can integrate with the system (using a third-party form builder or payment processor).

• **Recurring Gifts:** Lets you set up recurring gifts which are charged to donors’ credit cards at designated intervals through an integration with PayPal. Setting up recurring gifts is an unintuitive process.

• **Web Signup Form:** People can easily sign up for your email list using a form created with a third-party broadcast email client.

• **Online Payments:** Does not let you set up an online payment form on your website. You can set up the system to automatically import payment information submitted through PayPal or Wufoo, the vendor’s preferred third-party web form builder.

• **De-duping Online Actions:** Online signups or payments are logged to donors’ existing payment records by name or other contact information you can specify when building a form using Wufoo, the vendor’s preferred third-party web form builder.

• **Event Registration:** Does not let you accept online registration fees for events through the system. You can set the system to automatically import information submitted through online forms built using Wufoo, the vendor’s preferred third-party web form builder.

• **Online Recurring Payments:** Donors cannot set up recurring payments online (such as monthly donations) which are automatically charged to their credit cards unless you configure recurring payments through an integration with PayPal. Setting up recurring gifts is an unintuitive process.

• **Distributed/ Team Fundraising:** Supporters cannot set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts.

• **Membership Dues:** Lets members pay membership dues online only through an integration with PayPal and/or Wufoo, the vendor’s preferred web form builder.

• **Shopping Cart:** Does not support multiple purchases at the same time. This could be accomplished using Wufoo, the vendor’s preferred web form builder.

• **Payment Form Customization:** Vendor recommends using Wufoo to create web forms, which can be somewhat customized to match your website’s colors and fonts, but not your website navigation.

• **Transaction Fees:** Vendor does not charge a transaction fee for each payment. Transaction fees are charged by PayPal.

• **Refunds:** You must issue refunds through the merchant account, and then log the refund into the system manually.

• **Recurring Payments:** Donors cannot set up recurring payments online (such as monthly donations) which are automatically charged to their credit cards unless you configure recurring payments through an integration with PayPal. Setting up recurring gifts is an unintuitive process.

• **Mobile Giving:** There is no donor portal. Forms created in Wufoo or PayPal can be accessed via a mobile browser.

• **Self Management of Donor Record:** Does not allow donors to manage their own records. This could be accomplished using Wufoo, the vendor’s preferred web form builder.
Tracking Other Interactions

- **Event Registrants**: Lets you track everyone who has registered for a particular event.
- **Tracking Guests**: Lets you track non-paying guests for particular events, and distinguish them from those who paid.
- **Table Details**: Lets you assign guests to specific tables and manage meal preferences, but not the specific seating arrangements or amount of gifts raised per table.
- **Nametags**: Lets you create nametags for an event via a standard mail merge process.
- **On-Site Registration**: Can quickly mark those attending as having arrived by clicking next to their name in the registration roster.
- **Volunteer Interests**: Cannot track any information about interests to help match volunteers with jobs without custom categories on the constituent profile.
- **Volunteer Work Tracking**: Cannot log any details about specific hours and tasks for volunteers without custom categories on the constituent profile.
- **Membership Tracking**: Provides functionality to track member levels, payments, and expiration dates.
- **Other Interactions**: In addition to the interactions we’ve covered here, the system offers basic support for “a-thon” events and alumni information for higher education.

Customization

- **Customizing Values**: Lets you customize drop-down values for fields such as campaigns, type of relationships, and many others. You can change list values for most fields, including the order of the list.
- **Custom Fields**: Lets you add an unlimited number of custom fields, which can be placed on most screens in the system. Some fields can only be added by the vendor, at no additional cost.
- **Renaming Fields**: Cannot rename existing fields.
- **Moving or Deleting Fields**: Lets you move some (but not all) fields within the interface, or delete them altogether.
- **Custom Constituent Interactions**: Cannot create custom interactions without vendor help, in order to track multiple pieces of data about a single interaction (for instance, to track date, title, and audience rating for the lectures delivered by your volunteers).
- **Vendor Customization**: Vendor reports that they often add features or fields to customer requests without charge.
- **Access to Source Code**: Cannot access the source code in order to update or add functionality.

Integration

- **Existing Integrations**: Can automatically exchange data with third-party email clients (including Constant Contact, MailChimp, and Mandrill), online form builders (including Wufoo and Formstack), SmartyStreets for address verification, and PayPal.
- **Data Export**: Lets you export all data visible to users into another file format, such as .PDF and .CSV.
- **Data Import**: Lets you map different files of donor and gift information to the proper fields in the system, and import the data. Imports can be easily “rolled back” by the user. Can do a batch import for the system install, and an “incremental” import for subsequent jobs that adds de-duplication functionality.
- **Programmatic Integration**: Does not allow a programmer to create custom data feeds to an external system.

Accounting Support

- **Existing Integrations**: The vendor does not specifically support any existing integrations with accounting systems.
- **Approach to Batching**: Each donation is automatically assigned to a batch in order to ease the reconciliation process with an accounting system. You would typically manually compare reports from the database and your accounting package to reconcile.
• **Reconciling a Batch:** Cannot mark a batch of payments as “reconciled with accounting.” You can mark records as being passed to accounting, but this is not quite reconciliation.

• **Controlling Reconciled Donations:** There are no controls in place to prevent someone from editing a payment that has already been reconciled, and thus throwing the system out of balance with the accounting system.

**Ease of Use**

• **Ease of Use for Novices:** Easy. The system is carefully designed to be free of clutter, and easy to understand. There are easy step-by-step wizards, searches and quick lists for many features.

• **Speed for Expert Users:** Moderate. The system is optimized around the needs of novice users, and while all are likely to find it intuitive, experienced development directors may wish for more flexibility and shortcuts to ease repetitive tasks.

**Support and Training**

• **Training:** Vendor provides initial training via the internet at no additional cost, and additional training sessions can be scheduled at additional cost. Training videos are available without cost.

• **Manuals and Documentation:** Provides an online help section with written documentation. Online videos are available at no additional cost.

• **Support:** Vendor provides unlimited phone or email support during business hours without additional cost.

**Installation and Maintenance**

• **Installation and Maintenance:** As is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain, as the vendor takes care of the infrastructure and updates.

**Product Background**

• **History:** Vendor has been in business since 2009.

• **Clients:** Vendor reports over 600 North American clients.

• **Sustainability:** The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.
NeonCRM from Z2 Systems is a strong integrated online system with solid support for donor management. It has support for pledges, soft credits and batches for accounting purposes, and prospect management workflows that let you track the steps taken to convert prospects into active donors. The system automatically logs internally generated communications, and can also log email you send from any other system by including a special email address in the bcc line. Gift data can be easily imported into the system. There is some functionality to track and report on grants separately from other gifts, you must use custom fields to track foundation interest. The system also allows browser-based access via smartphones. The support for mail merged letters is useful, and broadcast email is bolstered by a MailChimp integration. NeonCRM has very strong functionality for Web integration and online payment processing, reporting, querying and the ability to customize. It supports a wide variety of constituent interactions—it not only has events, volunteers and membership functionality, but also full online-store functionality, including inventory tracking. There have been significant updates to this system since our 2011 report.

Adding and Tracking Donations

- **Quick Search**: Lets you quickly search the database for an existing person from anywhere in the interface using a form that searches all name, account number, and email fields, including a wildcard search so that correct spelling isn’t critical.
- **Quick Search on Custom Fields**: Lets you find a person by searching data entered into custom fields.
- **De-duping**: The system helps prevent duplicate entries when new people are entered by prompting you with a list of existing people with the same name or contact information.
- **Adding a Gift**: Adding a single gift into the system is a straightforward process of finding a donor and filling out fields. You can also charge credit cards and process ACH transactions within the system.
- **Batching Gifts**: For ease of reconciling with accounting systems, donations may be entered as part of a batch by creating a batch name, then selecting it on gift entry, or associated with a batch after entry by editing the gift and selecting the appropriate batch. Email receipts are automatically sent, and thank you letters are added to a queue.
- **Gift Quick Entry Interface**: Lets you quickly enter a number of gifts at one time through a streamlined quick entry interface. Allows you to set default values for batch entry fields. A new feature, searching by Account Number, allows for quick entry of checks.
- **Updating Donor Info via Quick Entry**: The quick entry interface lets you automatically create new donors and updates donor contact information when appropriate.
- **Importing Gifts**: Lets you easily map and import donor and gift information in custom file formats.
- **Adding Pledges**: Lets you enter pledges for future gifts, including the amount and scheduled date. The system can create a full set of pledges based a payment schedule, with some limited ability to customize as needed.
- **Viewing Pledges on Gift Entry**: When using the interface to add new gifts, you can easily see existing pledges and apply gifts against them, but you are not specifically asked to do so. However, the system provides a one-click process to apply donations against existing pledges.
- **Reminders for Pledges**: Staff members are notified when they login in that a pledge is near due.
- **Matching Gifts**: Lets you track matching gifts that need to be claimed from an employer by adding the donation, defining it as a matched gift, and then filling out a summary screen that allows you to “add matched pledge.”
- **Stock Gifts**: Doesn’t let you track the value of sold and unsold stock gifts out of the box, although you could track this information in donation custom fields.
- **Other Gift Types**: Supports tracking of tribute gifts, bequeathments, and in-kind and stock gifts.
• **Campaign or Funds:** Lets you assign gifts to a source, purpose, campaign, sub-campaign and fund, and split the gift across multiple of these.

• **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like.

• **Gift Notes:** Lets you add freeform notes to a gift.

• **Attaching Documents to Gift or Activity Record:** Lets you upload and attach documents to gifts, activities, and proposals and stores them as part of the database.

• **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.

• **Zero Dollar Donations:** Does not let you enter a gift with a zero dollar value for reporting purposes.

• **Gifts “In Honor of” and Tributes:** Lets you track gifts given “in honor of,” and tributes as specific gift types, and schedule notifications—for instance, summary thank you letters—to the honorees.

• **Premiums:** Lets you assign and track premiums and record tax deductible amount.

### Managing Donor Information

• **Multiple Contact Methods:** Lets you track three phone numbers, three email address, and unlimited physical addresses. You can label each of them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method. You can also choose to track more contact information in custom fields.

• **Multiple Addresses:** Lets you specify which addresses should be used for certain types of mailings, including dates.

• **Seasonal Addresses:** Lets you track people’s seasonal addresses, with effective dates, and automatically switches primary addresses for the appropriate timeframe.

• **Do Not Contact:** Lets you display a very prominent message in red text at the top of the donor record to notify staff that a particular person should not be contacted, and automatically removes the donor from mailing or email lists.

• **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, “family member,” “co-worker”) with custom relationship types.

• **Bi-Directional Relationships:** Lets you define relationships between donors as two-way (“spouse”) or directional (“boss; works for...”), and automatically assigns the appropriate relationships for both donors.

• **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships.

• **Householding:** A database record can describe an entire household; individuals within that household are listed on that record with all of their contact info and actions. Alternatively, household can instead be defined as by individuals linked in a “household” relationship. A household view shows the donations and interactions for a particular household without needing to run a query.

• **Staff Relationships:** Lets you track connections between donors and as many of your own staff members as you like, along with what staff member is responsible for the relationship.

• **Donor Notes:** A large text area lets you enter and view free form notes about donors. You can also attach documents as objects to notes, and schedule automated reminder emails to constituents and staffers from donor notes.

• **Manual Communication Log:** Lets you keep a manual log of communications such as phone calls or personal meetings.

• **Automatic Communications Log:** Automatically stores a record of all system-generated letters and emails for each constituent which are date-stamped.

• **Donor Dashboard:** Lets you easily see all recent communications and donor actions on one screen. You can customize this screen to include the fields that are most important to you using the “Personalize This Page” feature. A Donations Dashboard allows you to track incoming donations and report on campaigns.

• **Giving Totals:** Lets you easily see in one click or less from the main donor page all recent gifts, the number and amount of gifts this year, total giving, quantity, and first and last donation dates.

• **Donor Source:** Lets you track the source of a particular donor.
• **Organizational Profile:** Lets you create a profile for an organization as a distinct record and track the people who work for it through relationships.

• **Deceased Donors:** Lets you record donors as deceased by checking a field, which also marks them as “do not contact” and makes them inactive in the system.

• **Online Integrated Data Cleaning and Appending:** No functionality for online integrated data cleaning and appending. The preferred external vendor for this is Melissa Data.

• **Mobile Support:** Lets you access constituent records from mobiles via a view customized for mobile web browsers. NeonCRM also provides mobile responsive web donation and event forms.

• **Attaching Documents to Donor Record:** Lets you attach documents to the donor record and stores them as part of the database.

• **Ability to Track/Integrate Social Media Information with Donor Record:** No ability to track social media information with the donor record without using custom fields.

• **Ability to Track Donor Social Media Activities in the System:** Doesn’t let you track donor social media activities within the system.

### Prospecting and Proposals

• **Prospecting Workflow:** Lets you assign both a priority and a stage to a donor to manage a prospecting workflow. Prospecting “steps” can be relabeled and staff can see a centralized view of all prospect tracking.

• **Ticklers:** Lets you create a reminder for yourself for a particular task and date; shows the reminder prominently on the right of every screen at the appropriate time, and can optionally email you a reminder.

• **Creating Ticklers for Others:** Lets you create a reminder for someone else to do a task on a particular date.

• **Donor Research:** Provides functionality to automatically match donor information to outside resources in order to provide more information on giving capability and priority via the Melissa Data wealth rating. They add a star rating system to the top of the donor record measuring average household income and housing value by Zip code.

• **Reporting on Asks:** Lets you create reports that show all the asks that have been made, as well as the gifts.

• **Finding Your Prospects:** Lets you easily see the list of donors assigned to you as a solicitor through segmentation.

• **Proposal Tracking:** Lets you track what proposals are due, what you’ve submitted and what has already been approved by a particular foundation.

• **Foundation Interest Tracking:** You can track a particular foundation’s interest areas based on your organization’s custom categories of interest through a custom status pick list.

• **Grant Tracking and Reporting:** Lets you track and report on grants separately from other donations, with customizable moves management processes for grant cultivation.

• **Thresholds and Action Triggers:** Lets you schedule emailing of reports based on certain action triggers.

### Permissions

• **Permissions:** You can grant individuals access to granularly view, edit, or delete data at a functional level for a wide variety of system functions.

• **Field Level Permissions:** Cannot define user or group permissions on a field-by-field basis.

### Mail Merging Letters

• **General Mail Merge Approach:** Lets you create and save letter templates in Microsoft Word that include mail merged information. You can then mail merge data into those Word templates through the system without the need to export data. It also allows you to easily generate a merge file which can then be merged with Word for the Mac. NeonCRM also has an internal mail merge utility that can be used to create and modify letter templates, and preview the merged documents. You can also export data via .csv file to other systems.

• **Mail Merging on a Mac:** Lets you mail merge letters on a Mac through an easier than usual functionality to
export a mail merge file. Unless, however, you are using Internet Explorer with Microsoft Word, this requires more steps than their standard mail merge functionality.

- **Flexibility of Letter and Thank You Templates**: Lets you flexibly create letter templates both in Word and internally with complete control over layout, formats, logos, and images.
- **Personalizing Letters**: Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.
- **Tracking That Letters Were Sent**: Automatically logs for each donor that a letter was sent when you confirm that a batch of letters were printed.
- **One-off Thank Yous**: Lets you easily mail merge and print a single thank you letter from the gift entry interface.
- **Batch Processing of Thank You**: Lets you build a queue of people to be thanked by marking them at gift entry. You can then create letters for everyone at once in the Pending Mail Merge queue.
- **Mail Merging Gift Strings**: Lets you create letters that include custom gift strings based on a donor’s previous giving history, using Microsoft Word’s formula functionality.
- **Creating One-Off Letters**: Lets you mail merge a single letter using your choice of letter templates from a donor record.
- **Defining Group to Mail**: Lets you print letters through the system for a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event)
- **Printing Labels**: Lets you easily print labels for a set of people from the same query result page used to print letters.

**Emailing**

- **One-Off Email**: Lets you easily send email to particular individuals from their donor records. The system logs the email and saves a copy as part of the donor record.
- **Defining Group to Email**: Lets you send email through the system to a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event) by building a query.
- **Merging Data into Emails**: Lets you create individual and group email that includes both standard text and “mail merge” type inserted data. You can quickly search on tokens to include in the merge, but this does not include custom fields.
- **Merging Gift Strings into Email**: Lets you send emails include custom gift strings based on a donor’s previous giving history.
- **Graphical Emails**: Lets you create and save graphical email templates to use in emailing groups.
- **Scheduling Emails**: Lets you schedule email to send in the future. This is part of a very flexible feature that allows you set up emails to go out based on a number of different criteria, including date.
- **Email Server**: Emails are sent through the vendor’s email server, protecting you from blacklisting issues, and the vendor takes a series of steps to ensure email goes to donors’ inboxes rather than their spam filters.
- **Unsubscribes**: Donors can easily unsubscribe from emails without involving the organization.
- **Email Reports**: Lets you see the open rate, click-through rate and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports to allow you to follow up on email addressed that didn’t go through. These stats appear for emails sent through the base system or through MailChimp.
- **Automatic Emails**: Lets you set up automatic emails based on certain events, like a web form submission. You can also setup sequential emails, which are triggered over time (for instance, a user might receive one email immediately after submitting a form, and then another automatically a week later).

**Querying**

- **General Querying Approach**: Lets you create powerful queries with comparative ease by choosing criteria from a well organized interface. You can choose the columns you are interested in and create your own display for your
search result screen. A “Search Further” option allows you to eliminate items from a query so you can search for people who have “not” done something.

- **Querying Based on Giving:** Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts, and number of gifts this year compared to prior years.
- **Querying on Any Field:** Lets you query using criteria from any database field, including custom fields.
- **Complex Queries:** Lets you create complicated queries using an unlimited number of criteria connected with logical “ands” and “ors.” You can also use the “not” operator to exclude items from search results. A “Search Further” option allows you to eliminate items from a query so you can search for people who have “not” done something.
- **Expanding Queries:** Lets you easily limit or expand a query after you’ve generated the list by saving the query and editing it again.
- **Saving Queries:** Lets you save queries to be run again later.
- **Taking Actions on a List:** Once you have created a list, you can mail merge letters to that list, email to that list, update most fields in the database for the list, or export the list.
- **Packaged Queries:** The system includes several packaged queries.

**Reporting**

- **Standard Reports:** Lets you easily generate prepackaged reports including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This One (LYBUNT) or donors from Some Year but Unfortunately Not This One (SYBUNT). A new feature allows you to generate certain reports in one click.
- **Giving Reports:** Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.
- **Comparing Campaign Success:** Lets you compare success metrics for a number of different campaigns, but you cannot see the cost of the campaigns.
- **Reporting on Pledges:** Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts.
- **Ad Hoc Reports:** Supports Ad Hoc reports within the system which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos and headers.
- **Custom Fields in Ad Hoc Reports:** Custom fields can be displayed within Ad Hoc reports.
- **Saving Reports:** Lets you save reports that you create or modify. You can also save password-protected reports for public view for distribution to people outside the organization.
- **List of Favorite Reports:** Lets you quickly view favorite reports without navigating a much larger set.
- **Exporting Reports:** Lets you export reports to Excel or CSV formats, among others.
- **Distinguishing Reports:** The vendor highlights their LYBUNT/SYBUNT reports for membership and events, relationship queries for contact management, and the ability to share custom reports via hyperlink as distinguishing reports or features.
- **Custom Reports:** Lets you create custom reports through a reports wizard.
- **Graphical Capabilities:** Does not let you add charts and graphs to reports.
- **Dashboard Placement:** Lets you place reports on a dashboard for quick viewing.

**Payment and Website Integration**

- **Processing Credit Cards:** Lets you charge donors’ credit cards and online check payments within the system.
- **Recurring Gifts:** Lets you set up recurring gifts which are both logged and charged to donors’ credit cards at designated intervals.
- **Web Signup Form:** People can easily sign up for your email list via an integrated signup form on your website.
• **Online Payments:** Lets you set up an online payment form on your website and pull online payments automatically into your database. They offer a complete form builder that allows you to create an unlimited number of forms, and fully customize their fields, and their position and order.

• **De-duping Online Actions:** Online signups or payments are logged to donors’ existing payment records by matching the name and/or email address. You can then manage both the matched and unmatched donors through an interface. Auto authentication allows donors to be brought directly to a donation or event registration page without having to log in, and will automatically apply that transaction to their record.

• **Event Registration:** Lets you hold online registration for events, including multiple ticket prices (such as a VIP ticket) and meal options.

• **Online Recurring Payments:** Lets donors set up recurring payments online (such as monthly donations) which are automatically charged to their credit cards. These can be managed by the donor through the online constituent login portal, where they can also view their giving history or update contact information.

• **Distributed/Team Fundraising:** Lets supporters set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts.

• **Membership Dues:** Lets members pay membership dues online. Members can also log in and manage their contact info, profile and some measure of transactions as well. Membership dues are tracked separately from donations.

• **Shopping Cart:** Lets supporters purchase multiple items at once, as through a shopping cart, and offers substantial e-commerce capabilities.

• **Payment Form Customization:** Vendor provides an online payment form which can be customized to match your website’s template.

• **Transaction Fees:** Vendor does not charge a transaction fee for each payment. They will help you to set up a merchant account, which charges fees that range from 2.14 percent to 2.9 percent of every transaction. Online check payments are $0.35 per check. You can choose from several different payment processors to work with NeonCRM.

• **Refunds:** You must issue refunds through the merchant account, and then log the refund into the system manually. You can configure an automatic email that lets the donor know if the process was rejected.

• **Recurring Payments:** Lets donors set up recurring payments online (such as monthly donations), which are automatically charged to their credit cards.

• **Mobile Giving:** Can access the donor portal via mobile phones.

• **Self Management of Donor Record:** Lets donors manage their own contact information online.

**Tracking Other Interactions**

• **Event Registrants:** Lets you track everyone who has registered for a particular event.

• **Tracking Guests:** Lets you track non-paying guests for particular events, and distinguish them from those who paid.

• **Table Details:** Lets you manage table details for an event, including number of people per table, and the amount of gifts raised per table, but not the specific seating arrangements.

• **Nametags:** Lets you easily create nametags for an event through a one-click merge to a Word template.

• **On-Site Registration:** Can register new attendees, enter payments, send automated email receipts and quickly mark those attending as having arrived by clicking next to their name in the registration roster.

• **Volunteer Interests:** Lets you log volunteer activity for supporters if you create them as events, including date, duration and tasks, but no dollar equivalent for their time.

• **Volunteer Work Tracking:** Lets you log volunteer activity for supporters, including date, duration, tasks, mileage, and expenses, but no dollar equivalent for their time. You could use either an “activities/tasks” function or a “timesheet” function for this purpose rather than specific volunteer functionality.

• **Membership Tracking:** Provides functionality to track member levels, payments, and expiration dates, as well as different types of memberships (household, organizational), member-only privileges, and more.
• **Other Interactions**: In addition to the interactions we’ve covered here, the system offers support for RSS and social networking feeds. It also supports timesheets and project management, and the creation of surveys. It has full online store functionality with basic inventory and fulfillment tracking. The system also includes USPS shipping integration, digital downloads for emails and from the online store, and friend-to-friend fundraising capability.

**Customization**

• **Customizing Values**: Lets you customize drop-down values for fields such as campaigns, type of relationships, and many others.

• **Custom Fields**: Lets you add an unlimited number of different kinds of custom fields, which can be placed on most screens in the system.

• **Renaming Fields**: Cannot rename existing standard fields in the user view of NeonCRM.

• **Moving or Deleting Fields**: Cannot move or delete existing standard fields.

• **Custom Constituent Interactions**: Lets you create your own custom interactions, in order to track multiple pieces of data about a single interaction (for instance, to track date, title, and audience rating for the lectures delivered by your volunteers), using the Form Builder.

• **Vendor Customization**: Vendor will customize system to your needs at additional cost.

• **Access to Source Code**: Cannot access the source code in order to update or add functionality. You can access “snippets” of the source code to help with embedding information.

**Integration**

• **Existing Integrations**: Can automatically exchange data with phpBB, Google Analytics, MailChimp, QuickBooks, USPS shipping and Zip+4, Click2Mail, Google Maps, MS Word and Excel, five payment processing partners, and DonorPath

• **Data Export**: Lets you export all data visible to users into another file format, such as .XLS, .PDF, .DOC, or .CSV.

• **Data Import**: Lets you map different files of donor and gift information to the proper fields in the system, and import the data. A quick import allows for faster entry of simple contact data.

• **Programmatic Integration**: Provides an API to allow a programmer access to all areas of the NeonCRM system.

**Accounting Support**

• **Existing Integrations**: Lets you automatically export data to QuickBooks, but requires a module at additional cost.

• **Approach to Batching**: Lets you create batches of payments in order to ease the reconciliation process with an accounting system, including separate batches for checks and cash.

• **Reconciling a Batch**: You can manually mark a batch of payments as “reconciled with accounting.” The QuickBooks integration automatically marks accounts as reconciled.

• **Controlling Reconciled Donations**: Each gift record is “locked” after the transaction is synced with QuickBooks. Those who have permission to unlock a gift could then do so and update it. The system will log such changes.

**Ease of Use**

• **Ease of Use for Novices**: Moderate. The organization of the system relies on many different screens, each with lots of screens and buttons. There’s a lot of information on each page, making it sometimes difficult to find features or fields. Less technically savvy users may feel initially overwhelmed.

• **Speed for Expert Users**: Moderate. Once you get used to the interface, it will be much faster to get things done, but there are still a lot of screens and fields to navigate through for many tasks. It doesn’t provide a lot of specific functionality to make common tasks faster.
Support and Training

- **Training**: Vendor provides free training videos, and offers each organization an online web based training with a real person for approximately $400. The vendor also offers recorded group webinars and online live group training. On-site training is additional.
- **Manuals and Documentation**: Provides an online library with dozens of videos and written documents.
- **Support**: Vendor provides unlimited email and online ticket support for free. Live chat support is $600 per year, and phone support is $1,140 per year.

Installation and Maintenance

- **Installation and Maintenance**: As is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain, as the vendor takes care of the infrastructure, connectivity to the internet, and about five to 10 updates, fixes, and improvements per year.

Product Background

- **History**: Vendor has been in business for nine years; NeonCRM has been in use by clients for nine years.
- **Clients**: Vendor reports over 1,000 clients for this particular package.
- **Sustainability**: The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.
The Raiser’s Edge(i) by Blackbaud is a well-established and sophisticated donor management tool. In this version of the software, the Raiser’s Edge fundraising software is packaged with online donation and email marketing capabilities through NetCommunity Spark, also in the Blackbaud suite of products. In The Raiser’s Edge(i), individuals and organizations are “constituents” and, as with all connections between constituents, households are represented by linking constituents together through user-defined-attribute relationships. This can be a bit confusing at the relationship-dashboard level, since you can see relationships ranging from a donor’s daughter to his golf partner, but you can apply filters to be able to easily see relationships of interest to you. Constituents are assigned user-defined codes to help with list segmentation, and searching abilities are flexible and powerful. Gift- and pledge-tracking is very robust, and acknowledgements are handled through a mail-merge integration with Microsoft Word. The Raiser’s Edge(i) has a complex and powerful querying tool that accommodates dynamic queries, but to send broadcast emails to a particular constituent group, you need to switch to NetCommunity Spark interface before doing so. The system comes with many best practice reports and dashboards that are relatively straightforward to tailor to an organization’s specific needs. To truly create an ad hoc report from scratch, an organization would need to use the external custom reporting tool, Crystal Reports. There’s a direct integration with the Financial Edge, Blackbaud’s accounting system. Pricing for the Raiser’s Edge(i) is $10,050 for a single user license, which includes an implementation fee but not support, which ranges from $1,000 to $2,250. For a nonprofit requiring three user licenses, the price is $20,025 in the first year. There are also ongoing annual maintenance fees, ranging from about $2,000 to $3,000, which include support. Training requires an additional fee of between $1,000 and $3,750.

Adding and Tracking Donations

- **Quick Search:** Lets you quickly search the database for an existing person or organization from anywhere in the interface using a form that searches first name, last name, address, constituent ID, social security number, household, and groups. It includes a fuzzy search so that correct spelling isn’t critical.

- **Quick Search on Custom Fields:** Lets you find a person or organization by searching data entered into custom fields using the query tool, but not the search tool.
• **De-duping:** Lets you easily search for and merge two records if it becomes apparent that those records are duplicates.

• **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.

• **Batching Gifts:** For ease of reconciling with accounting systems, each donation is automatically assigned to a batch when you process the donations that have not yet been receipted.

• **Gift Quick Entry Interface:** Lets you quickly enter a number of gifts at one time through a streamlined quick-entry interface which can be tailored on the fly with the appropriate fields and defaults for a particular set of gifts. This robust interface is setup in a spreadsheet-like format with customizable columns.

• **Updating Donor Info via Quick Entry:** The import and quick entry interface lets you automatically create new donors and updates donor contact information when appropriate.

• **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats.

• **Adding Pledges:** Lets you enter pledges for future gifts, including the amount and scheduled date. This is then handled as an invoice and consolidated into statements. The system can create a full set of pledges based a payment schedule, which you can then customize as needed. It will also automatically adjust the payment schedule as needed if a pledge is overpaid or underpaid.

• **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, the system asks if you want to apply them against existing pledges.

• **Reminders for Pledges:** Can flexibly configure the system to notify the appropriate staff member(s) with a reminder or via email when a pledge is near due.

• **Matching Gifts:** Lets you track matching gifts that need to be claimed from an employer through a two-step process. You first define the giving criteria and ratios on the employer's record. When a transaction is recorded on a donor's record, the system will check for potential matching opportunities from employers with a matching program recorded in the system. An optional service, MatchFinder, can identify matching gift criteria for all employer records, at additional cost.

• **Stock Gifts:** The system can track both the unsold and sold values of stock gifts.

• **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, in-kind or other gifts.

• **Campaign or Funds:** Lets you assign gifts to a particular source, campaign or fund, or split the gift across multiple of these, as well as to track the solicitation and sub-solicitation that generated a gift. Supports the above for both online and offline gifts.

• **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like.

• **Gift Notes:** The system lets you add freeform notes to a gift. These notes can be queried and reported on.

• **Attaching Documents to Gift or Activity Record:** The system does not let you upload and attach documents to gifts.

• **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.

• **Zero Dollar Donations:** The system records the value of goods, services, and other in-kind gifts.

• **Gifts “In Honor of” and Tributes:** Lets you track gifts given “in honor of” and tributes. Can designate honorees and set notifications for honorees and donors. Can generate letters to honorees.

• **Premiums:** Lets you assign and track premiums and record tax deductible amount.

### Managing Donor Information

• **Multiple Contact Methods:** Lets you track as many phone numbers and addresses as you like, label them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method.

• **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings.

• **Seasonal Addresses:** Lets you track people’s seasonal addresses, with effective dates, and automatically switches primary addresses for the appropriate timeframe. Effective dates are specified in months, as opposed to an actual calendar day.
• **Do Not Contact:** Lets you mark that a particular person should not be contacted by assigning customizable “solicit codes” to their record. Donors marked with these codes are automatically excluded from contact lists.

• **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, “family member,” “co-worker”) with custom relationship types.

• **Bi-Directional Relationships:** Lets you define relationships between donors as one-way (“would like to meet”), two-way (“spouse”) or directional (“boss; works for...”), and automatically assigns the appropriate relationships for both donors.

• **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships. It’s not easy to see all the individuals associated with a family unit; all relationship associated with a household are all shown together and it’s difficult to determine who actually lives there.

• **Householding:** A database record describes a single individual and all their contact information and actions; you can connect them to others in their household through special relationships. You can define which addresses to share or not to share in relationships.

• **Staff Relationships:** Lets you track connections between donors and as many of your own staff members as you like, along with what staff member is responsible for the relationship.

• **Donor Notes:** A large text area lets you enter and view free form notes about donors. You can click on a note to get a more detailed view of it. The system also provides the ability upload documents for any donor. Lets you query and report on free form notes about donors.

• **Manual Communication Log:** Lets you keep a manual log of communications such as phone calls or personal meetings through either a call log or tasks.

• **Automatic Communications Log:** Automatically stores a record of all system-generated letters and emails for each donor.

• **Donor Dashboard:** Lets you see all recent communications and donor actions on one screen. You can customize this screen to include the fields that are most important to you.

• **Giving Totals:** Lets you easily see in one click or less from the main donor page all recent gifts, the number and amount of gifts this year, and total giving. / You can configure this screen to choose the lists and aggregate stats that are most useful to you.

• **Donor Source:** Lets you track the source of a particular donor.

• **Organizational Profile:** Lets you create a profile for an organization and track the people who work for it.

• **Deceased Donors:** Lets you record donors as deceased by checking a field. Deceased donors are excluded from mailings. System logic will make relevant updates due to death, e.g., replacing deceased as head of household, if necessary.

• **Online Integrated Data Cleaning and Appending:** Lets you link to AddressFinder (NCOA), Giving Score, WealthPoint, DeceasedRecordFinder, EmailFinder, PhoneFinder, and AddressAccelerator by passing donor information from the system. Data brought back into the system goes into fields separate from other system fields.

• **Mobile Support:** Lets you access constituent records and run reports from mobiles via an application designed specifically for mobile access.

• **Attaching Documents to Donor Record:** Lets you attach documents to the donor record and store them as part of the database.

• **Ability to Track/Integrate Social Media Information with Donor Record:** Lets you link to constituents’ social media pages within their record as an electronic address.

• **Ability to Track Donor Social Media Activities in the System:** Constituents’ organization-related social media activities can be captured in the system through an integration with Blackbaud’s Target Analytics, at additional cost.

## Prospecting and Proposals

• **Prospecting Workflow:** Lets you assign a priority, a stage, and a next action to a constituent to manage a prospecting workflow in the Prospect tab. The system provides support for wealth tracking, ratings, proposals. The system can help you provide a workflow that assigns that specific course of action to a record, can record a point of action and send auto-reminders to staffers for next steps.
Ticklers: Lets you create a reminder for yourself for a particular constituent, task and date and shows the reminder prominently on the homepage along with what is overdue, due, and other filters.

Creating Ticklers for Others: Lets you create a reminder for someone else to do a task on a particular date.

Donor Research: Automatically matches donor information to outside resources in order to provide more information on giving capability and priority via Blackbaud’s The Giving Score.

Reporting on Asks: Lets you create reports that show all the asks that have been made, as well as the gifts.

Finding Your Prospects: Lets you easily see the list of donors assigned to you as a solicitor by running a segmentation report.

Proposal Tracking: Lets you track what proposals are due, what you’ve submitted, and what has already been approved by a particular foundation through a dedicated Prospects module. This functionality is very detailed, and includes likelihood, links to supporting documents, dates for a site visit, and many other fields.

Foundation Interest Tracking: Lets you track a particular foundation’s interest areas based on your organization’s custom categories of interest.

Grant Tracking and Reporting: Lets you track and report on grants separately from other gifts; can record request and award amounts, payment types, and deliverables. Can record due dates and reminders for grants and assign them to any staff member with customizable moves management processes for grant cultivation.

Thresholds and Action Triggers: Lets you schedule emailing of reports based on certain action triggers.

Permissions

Permissions: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.

Field Level Permissions: Lets you define user or group permissions on a field-by-field basis and by query through the Permissions Suite.

Mail-Merging Letters

General Mail Merge Approach: Lets you create and save letter templates in Microsoft Word that includes mail-merged information. You can then mail merge data into those templates through the system using the Word mail merge wizard.

Mail Merging on a Mac: Does not support integrated mail merge on a Mac.

Flexibility of Letter and Thank You Templates: Lets you create flexible templates to receive mail-merged data.

Personalizing Letters: Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.

Tracking That Letters Were Sent: Automatically logs for each donor that a letter was sent when you confirm that a batch of letters were printed.

One-off Thank Yous: Lets you easily mail merge and print a single thank you letter from the gift entry interface by choosing from a number of letter templates.

Batch Processing of Thank You: Lets you query to find all those who need to be thanked (for example, by finding recent donors who have not yet been thanked), and create letters for them all at once.

Mail Merging Gift Strings: Lets you create letters that include custom gift strings based on a donor’s previous giving history.

Creating One-Off Letters: Lets you mail merge a single letter using your choice of letter templates from a donor record.

Defining Group to Mail: Lets you print letters through the system for a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event).

Printing Labels: Lets you easily print labels for a set of people from the same query result page used to print letters.
Emailing

- **One-Off Email**: Lets you easily send email to particular individuals from their donor records.
- **Defining Group to Email**: Lets you send email through the system to a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event).
- **Merging Data into Emails**: Lets you create group email that includes both standard text and “mail merge” type inserted data.
- **Merging Gift Strings into Email**: Lets you send emails that include custom gift strings based on a donor’s previous giving history.
- **Graphical Emails**: Lets you create and save graphical email templates to use in emailing groups through NetCommunity.
- **Scheduling Emails**: Lets you schedule email to send in the future through NetCommunity. This is part of a very flexible feature that allows you set up emails to go out based on a number of different criteria, including date.
- **Email Server**: Emails are sent via system-integrated NetCommunity protecting you from blacklisting; NetCommunity takes measures to ensure email goes to donors’ inboxes rather than their spam filters.
- **Unsubscribes**: Donors can easily unsubscribe from emails without involving the organization.
- **Email Reports**: Lets you see the open rate, click-through rate, and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports to allow you to follow up on undelivered email. These statistics appear on the constituent record.
- **Automatic Emails**: Lets you set up automatic emails based on certain events through NetCommunity. For example, you can schedule an email based on a criteria built in the query interface, to email any new donors added in the past week. You can also set up sequential emails, which are triggered over time (for instance, a user might receive one email immediately after submitting a form, and then another automatically a week later).

Querying

- **General Querying Approach**: Lets you query for a set of constituents who meet criteria for a standard set of fields and lets you create a flexible query for a set of constituents based on almost any field in the database.
- **Querying Based on Giving**: Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts, and number of gifts this year compared to prior years.
- **Querying on Any Field**: Lets you query using criteria from any database field, including custom fields.
- **Complex Queries**: Lets you create complicated queries using an unlimited number of criteria connected with logical “ands” and “ors.” They provide particularly powerful functionality in this area—you can define “exclusive not” queries that exclude the results for one query from a different one.
- **Expanding Queries**: Lets you easily limit or expand a query after you’ve generated the list by editing the filters and criteria from your saved query.
- **Saving Queries**: Lets you save queries to be run again later.
- **Taking Actions on a List**: Once you have created a list, you can mail merge letters to that list, email to that list, update any field in the database for the list, or export the list.
- **Packaged Queries**: Includes the package queries underlying the standard reports.

Reporting

- **Standard Reports**: Lets you easily generate prepackaged reports including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This One (LYBUNT) or donors from Some Year but Unfortunately Not This One (SYBUNT) through more than 140 standard reports that come in the system. You can also use Crystal Reports for ad hoc reports.
- **Giving Reports**: Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.
• **Comparing Campaign Success:** Lets you compare success metrics for a number of different campaigns in one report, including the donations compared to the cost of the campaigns.

• **Reporting on Pledges:** Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts.

• **Ad Hoc Reports:** Supports Ad Hoc reports within the system which can include and filter by nearly any field displayed to users.

• **Custom Fields in Ad Hoc Reports:** Custom fields can be displayed within Ad Hoc reports.

• **Saving Reports:** Lets you save the queries that you use to export data to create reports

• **List of Favorite Reports:** Lets you quickly view favorite reports without navigating a much larger set.

• **Exporting Reports:** Lets you export reports to CSV, Excel, or PDF format, or to Crystal Reports.

• **Distinguishing Reports:** The vendor highlights the variety of their standard reports, which includes donor retention, accounting, and ROI reports, as well as built-in totals and statistic calculations included in each report, as distinguishing from other systems.

• **Custom Reports:** Lets you create custom reports through Crystal Reports.

• **Graphical Capabilities:** The system lets you add a wide variety of charts and graphs to reports.

• **Dashboard Placement:** Lets you place query results, but not reports, on a dashboard.

### Payment and Web Site Integration

• **Processing Credit Cards:** Lets you handle EFT transactions and charge donors’ credit cards within the system if configured with an external payment processor, like Blackbaud Merchant Services, Sage, or IATS, among others.

• **Recurring Gifts:** Lets you set up recurring gifts which are both logged and charged to donors’ credit cards at designated intervals.

• **Web Signup Form:** People can easily sign up for your email list via an integrated signup form on your website with NetCommunity integration.

• **Online Payments:** Lets you process a broad range of payment options through integration with Blackbaud’s NetCommunity, at additional cost.

• **De-duping Online Actions:** Online signups or payments are logged to donors’ existing payment records, by matching according to user-defined criteria. Changes to donor information through the donor portal are logged to donors’ existing payment records by name or other contact information you can specify. These possible duplicates are presented for your confirmation before being logged in the system.

• **Event Registration:** Lets you accept online registration fees for events, including multiple ticket prices (such as a VIP ticket), meal options, and assigned seating.

• **Online Recurring Payments:** Lets donors set up recurring payments online (such as monthly donations) which are automatically charged to their credit cards through NetCommunity.

• **Distributed/Team Fundraising:** Lets supporters set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts through integration with TeamRaiser, a separate BlackBaud product at additional cost.

• **Membership Dues:** Lets members pay membership dues online through NetCommunity. Members can also log in and manage their contact info, profile and some measure of transactions as well.

• **Shopping Cart:** It’s possible for supporters to purchase multiple items at once, as through a shopping cart.

• **Payment Form Customization:** Vendor provides an online payment form which can be somewhat customized to match your website’s colors and fonts, but not your Web site navigation, through integration with Blackbaud’s NetCommunity. The vendor will extensively customize payment forms to match your website’s look and feel, for an additional fee.

• **Transaction Fees:** The system includes Blackbaud Merchant Services (BBMS) which provides payment processing at a single rate of 2.598 percent plus $0.26 per transaction. Other merchant services can be used as well.

• **Refunds:** You must issue refunds through the merchant account, and then log the refund into the system manually.
• **Recurring Payments:** Lets donors set up recurring payments online (such as monthly donations), which are automatically charged to their credit cards.

• **Mobile Giving:** Can access the donor portal via mobile phones.

• **Self Management of Donor Record:** Lets donors update site-defined profile information online, through integration with Blackbaud’s NetCommunity at additional cost.

## Tracking Other Interactions

• **Event Registrants:** Lets you track everyone who has registered for a particular event. In addition, the Events module lets you track invitations, who actually attended, and sponsors. The Events module is included in the Enterprise version of the product; for other pricing levels, it is an additional cost.

• **Tracking Guests:** Lets you track non-paying guests for particular events, and distinguish them from those who paid. The Events module is included in the Enterprise version of the product; for other pricing levels, it is an additional cost.

• **Table Details:** Lets you manage table details for an event, including names of table captains, seating arrangements, and the amount of gifts raised per table, with Events module.

• **Nametags:** Lets you create nametags for an event via a standard mail merge process.

• **On-Site Registration:** Provides functionality specifically to support onsite event registration via a new, free iPad app.

• **Volunteer Interests:** Lets you track an individual’s interests and skills to match them with potential volunteer opportunities. Raiser’s Edge also offers a dedicated volunteer module, at additional cost. On the Volunteer Tab, you can find jobs or find volunteers that have the characteristics that you’re looking for, when they’re available, and what they’re qualified for. Constituents can express interest for specific jobs and enter biographical details themselves online, but a staffer would still need to perform data entry on the back end. Some volunteer information, like availability and skills, are not available to enter online.

• **Volunteer Work Tracking:** Lets you log volunteer activity for supporters, including date, duration and tasks, as well as the dollar equivalent for their time, with the Volunteer Module.

• **Membership Tracking:** Provides functionality to track member levels, payments, and expiration dates.

• **Other Interactions:** Lets people RSVP for the events online for general admission (not specific seats), with member and nonmember prices. The system helps you manage overflow and waitlists. You would need to employ the Events module, which is an additional cost.

## Customization

• **Customizing Values:** Lets you customize drop-down values for fields such as campaigns, type of relationships, and others. Does not let you customize drop-down values for gift types or states.

• **Custom Fields:** It’s not possible to add unlimited number of custom fields, which can be placed on most screens in the system. An attributes tab is available for each record type for configuration.

• **Renaming Fields:** Lets you rename existing fields.

• **Moving or Deleting Fields:** Lets you move or hide some (but not all) fields within the interface.

• **Custom Constituent Interactions:** Lets you create your own custom interactions, in order to track multiple pieces of data about a single interaction (for instance, to track date, title, and audience rating for the lectures delivered by your volunteers).

• **Vendor Customization:** Vendor will extensively customize system to your needs as part of the setup process at additional cost.

• **Access to Source Code:** It’s possible to access the API in order to update or add functionality, in a non-hosted environment, for an additional cost.

## Integration

• **Existing Integrations:** Can automatically exchange data with AddressFinder (NCOA), Giving Score, Wealth-
Point, DeceasedREcordFinder, EmailFinder, PhoneFinder, and AddressAccelerator. Automatic and batch import of results are facilitated by The Raiser's Edge Web Services and Data Health Center, respectively.

- **Data Export**: Lets you export all data visible to users into another file format, including .XLS, .PDF, or .CSV, among others.
- **Data Import**: Lets you map different files of donor and gift information to the proper fields in the system, and import the data.
- **Programmatic Integration**: Provides a partial API to most tables in the system to allow a programmer to create custom data feeds to an external system. The API is included in the Enterprise package, but requires an additional cost for other pricing levels.

### Accounting Support

- **Existing Integrations**: The system is designed to integrate with The Financial Edge through a one-click wizard, another Blackbaud product, as well as ResearchPoint, PGCalc, PaperSave, and AuctionMaestroPro.
- **Approach to Batching**: Lets you setup the types of transactions that should be batched into each account code for the accounting system. Lets you create and track accounting batches in order to ease the reconciliation process with an accounting system. Lets you link a batch to a deposit slip number to tie it back to the accounting system. Lets you batch and transfer payments received online into the accounting system.
- **Reconciling a Batch**: Lets you mark a batch of payments as “reconciled with accounting.”
- **Controlling Reconciled Donations**: Each gift record is “locked” after the transaction batch is posted to the general ledger. Those who have permission to unlock a gift could then do so and update it. The system will log such changes.

### Ease of Use

- **Ease of Use for Novices**: Complex. The system has a technical look to it, with a number of complex screens. The system is powerful but complicated. Many users will require training.
- **Speed for Expert Users**: Moderate. Once you get used to the interface, it will be much faster to get things done, but there are still a lot of screens and fields to navigate through for many tasks. It doesn't provide a lot of specific functionality to make common tasks faster.

### Support and Training

- **Training**: Vendor provides training, either via the internet or live, at additional cost.
- **Manuals and Documentation**: Lets you access a useful combination of help text throughout the application, online help, written manuals and recorded trainings to help staff understand how to use the system. It’s possible to have process documentation to help staff understand how they’re supposed to enter data, through user forums online.
- **Support**: Vendor provides phone and online chat support for a flat fee of around $1,512 per year.

### Installation and Maintenance

- **Installation and Maintenance**: You’ll need someone with technical skills to support the database and its server if you host it yourself. You can also opt to have Blackbaud host the implementation of The Raiser's Edge(i) and outsource that process.

### Product Background

- **History**: Vendor has been in business since 1981 and the system has been available since 1987.
- **Clients**: Vendor reports over 12,000 North American clients.
- **Sustainability**: The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.
Salesforce is a powerful Constituent Relationship Management system used widely in the for-profit world. The Enterprise edition of the software is free for free to 501(c)(3) organizations for up to ten licenses, and Nonprofit Starter Pack is available with some basic support for donations out of the box – you can download it from the Salesforce Foundation’s website. This customization provides a basic template to handle nonprofit and donation data that can be used as-is or extended by developer at addition cost, or by tech-savvy staff. There are many options for querying, receipting, segmenting, reporting, exporting, and integrating with other systems. Householding and relationships have been refined substantially since we last looked at the system. The system is very flexible in tracking and displaying all the myriad ways a constituent might interact with an organization—but this flexibility brings complexity. It’s harder to learn to use than some of the other systems, and many will want to work with a consultant to get the system set up. We’ve looked at several systems that use Salesforce as a building block in this report, including Affinaquest, Causeview, Click & Pledge, and PatronManager.

Adding and Tracking Donations

- **Quick Search:** Lets you quickly search the database for an existing person or organization from anywhere in the interface using a form that searches first name, last name, address, and groups.
- **Quick Search on Custom Fields:** Lets you find a person or organization by searching data entered into custom fields.
- **De-duping:** The system does not provide any built-in functionality to prevent duplicate entries. There are a number of free or low-cost de-duping tools available on the Salesforce AppExchange.
- **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.
- **Batching Gifts:** For ease of reconciling with accounting systems, donations may be entered as part of a batch through the quick entry screen by creating a batch name, or associated with a batch after entry by editing the gift and selecting the appropriate batch.
- **Gift Quick Entry Interface:** Lets you quickly enter a number of gifts at one time through a streamlined quick-entry interface which can be tailored on the fly with the appropriate fields and defaults for a particular set of gifts.
• **Updating Donor Info via Quick Entry:** There are separate quick entry interfaces for gift entry and contact data information. The interfaces are identical, but a user cannot update donor information on the gift quick entry, and vice versa.

• **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats. The mapping information can be saved and reused.

• **Adding a Pledge:** Lets you enter pledges for future gifts, including the amount and scheduled date. The system can create a full set of pledges based a payment schedule, which you can then customize as needed.

• **Viewing Pledges on Gift Entry:** There are no on-screen reminders for outstanding pledges when using the interface to add new gifts. Open pledges are displayed on the donor profile with the donor's giving history, but is not prominently displayed.

• **Reminders for Pledges:** Lets you run a report to see pledges that are near due, but staff members are not proactively notified.

• **Matching Gifts:** Lets you track matching gifts that need to be claimed from an employer through a matching record on each new gift entry. This tracks the matching amount and whether the match has been paid.

• **Stock Gifts:** The system cannot track stock donations out of the box. Users could track the unsold and sold values of stock gifts by creating a new gift type.

• **Other Gift Types:** Does not support tracking of tribute gifts, bequeathments, in-kind, or other gifts out of the box. Users could track this information by creating a new gift type.

• **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign or fund, as well as to track the solicitation and sub-solicitation that generated a gift. There are free tools available on the Salesforce AppExchange that allow users to split gifts across multiple funds or campaigns. Supports the above for both online and offline gifts.

• **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like.

• **Gift Notes:** The system lets you add freeform notes to a gift. These notes can be queried and reported on.

• **Attaching Documents to Gift or Activity Record:** The system lets a user upload and attach documents to gifts, activities, and/or proposals and stores them as part of the database.

• **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.

• **Zero Dollar Donations:** The system records the value of goods, services, and other in-kind gifts.

• **Gifts “In Honor of” and Tributes:** Lets you track gifts given “in honor of,” and tributes. Can designate honorees and generate letters to honorees. Lets you set notifications for honorees and donors through custom fields only.

• **Premiums:** No specific functionality for assigning and tracking premiums. A user could track this through custom fields.

### Managing Donor Information

• **Multiple Contact Methods:** Lets you track up to three phone numbers, three email addresses, and two physical addresses. You can label each of them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors' preferred contact method.

• **Multiple Addresses:** Does not let you specify which address should be used for certain types of mailings.

• **Seasonal Addresses:** Lets you track people's seasonal addresses as an additional address. There is no built-in functionality to set effective dates without using custom fields.

• **Do Not Contact:** Lets you display a field near the top of the donor screen to notify staff that a particular person should not be contacted.

• **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, “family member,” “co-worker”) with custom relationship types.

• **Bi-Directional Relationships:** Lets you define relationships between donors as two-way (“spouse”) or directional (“boss; works for...”), and automatically assigns the appropriate relationships for both donors.

• **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationship including the degrees of separation between everyone in the database.
Householding: A database record describes a single individual and all their contact information and actions; you can connect them to others in their household through special relationships. You can define which addresses to share between a household and its contacts.

Staff Relationships: Does not meet this criteria.

Donor Notes: A large text area lets you enter and view free form notes about donors. You can click on a note to get a more detailed view of it. The system also provides the ability upload documents for any donor. Lets you query and report on free form notes about donors.

Manual Communication Log: Lets you keep a manual log of communications such as phone calls or personal meetings. Manual communication logs are included in system queries and reports.

Automatic Communications Log: Automatically stores a record of all system-generated letters and emails for each donor. Emails generated outside the system can be recorded by emailing them to the system (for example, bcc-ing a unique system email address on emails).

Donor Dashboard: Lets you easily see all recent communications and donor actions on one screen—although a particularly long screen.

Giving Totals: Lets you easily see all recent gifts in one click or less from the main donor page. You can drill down from that page to see the number and amount of gifts this year, or total giving.

Donor Source: Lets you track the source of a particular donor.

Organizational Profile: Lets you create a profile for an organization and track the people who work for it.

Deceased Donors: Does not let you record donors as deceased without custom fields. A client could create custom workflow to make relevant updates due to death, e.g., replacing deceased as head of household, if necessary.

Online Integrated Data Cleaning and Appending: Integration with data cleaning and appending services like WealthEngine or address verification services is available through third-party apps on the Salesforce AppExchange.

Mobile Support: Lets you access constituent records from mobiles via a mobile web browser. The system is not customized for mobile web browsers. Several free Salesforce apps for mobile devices are available.

Attaching Documents to Donor Record: Lets you attach documents to the donor record and store them as part of the database.

Ability to Track/Integrate Social Media Information with Donor Record: Lets you record a donor’s social media links to fields in the donor record. requires installation of modules—most of which are free—from the Salesforce Apps Exchange.

Ability to Track Donor Social Media Activities in the System: Constituents’ organization-related social media activities can be captured in the system. Users can sign into their social media accounts through the system, and message, like, comment, retweet, etc.

Prospecting and Proposals

Prospecting Workflow: Lets you assign both a priority and a stage to a donor to manage a prospecting workflow using custom fields. One or more free or low-cost apps are available to provide more robust predefined workflow.

Ticklers: Lets you create a reminder for yourself for a particular task and date. Shows the reminder prominently on the calendar or in a task list at the appropriate time. Shows the reminder prominently on the homepage along with what is overdue, due, and other filters. Shows the reminder in reports. Shows the reminder prominently on startup of the application. Can optionally email you a reminder.

Creating Ticklers for Others: Lets you create a reminder for someone else to do a task on a particular date. You have a number of options here—you can assign a task to your organization as a whole, to one or more people, or to a “query” of people based on how they are related to other info in the system.

Donor Research: Automatically matches donor information to outside resources in order to provide more information on giving capability and priority—at additional cost. They provide a number of strong options in this area, but none are included in the base package.

Reporting on Asks: Lets you create reports that show all the asks that have been made, as well as the gifts.
• **Finding Your Prospects**: Lets you easily see the list of donors assigned to you as a solicitor by running a segmentation report. In addition, up to 10 prospects can be displayed on a user’s dashboard.

• **Proposal Tracking**: Lets you track what proposals are due, what you’ve submitted and what has already been approved by a particular foundation.

• **Foundation Interest Tracking**: Lets you track a particular foundation’s interest areas via notes only. This functionality could be created through custom fields, which could be included in queries and reports.

• **Grant Tracking and Reporting**: Lets you track and report on grants separately from other gifts by creating a new gift type; can record grant probabilities, request and award amounts, payment types, and deliverables. Can record due dates and reminders for grants and assign them to any staff member.

• **Thresholds and Action Triggers**: Lets you schedule emailing of reports based on certain action triggers.

**Permissions**

• **Permissions**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.

• **Field Level Permissions**: You can define user or group permissions on a field-by-field basis.

**Mail Merging Letters**

• **General Mail Merge Approach**: Lets you create and save letter templates in Microsoft Word that include mail merged information. You can then mail merge data into those templates through the system, without the need to export data.

• **Mail Merging on a Mac**: Lets you mail merge letters on a Mac. As the letters are mail merged through the server, it doesn’t matter what operating system is running on the desktop computer.

• **Flexibility of Letter and Thank You Templates**: Lets you flexibly create letter templates in Word with complete control over layout, formats, logos, and images.

• **Personalizing Letters**: Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.

• **Tracking That Letters Were Sent**: Automatically logs for each donor that a letter was sent.

• **One-off Thank Yous**: Lets you easily mail merge and print a single thank you letter from the gift entry interface.

• **Batch Processing of Thank Yous**: Lets you build a queue of people to be thanked by running a query to find all those who need to be thanked (for example, by finding recent donors who have not yet been thanked), and create letters for them all at once.

• **Mail Merging Gift Strings**: Lets you create letters that include custom gift strings based on a donor’s previous giving history, using Microsoft Word’s formula functionality.

• **Creating One-Off Letters**: Lets you mail merge a single letter using your choice of letter templates from a donor record.

• **Defining Group to Mail**: Lets you print letters through the system for a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event).

• **Printing Labels**: Lets you easily print labels for a set of people from the same query result page used to print letters if you’ve created the necessary template in Microsoft Word.

**Emailing**

• **One-Off Email**: Lets you easily send email to particular individuals from their donor records. The system automatically logs the email and saves a copy as part of the donor record.

• **Defining Group to Email**: Lets you send email through the system to a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event).
• **Merging Data into Emails:** Lets you create individual and group email that includes both standard text and “mail merge” type inserted data. The system uses the same mail merging tool for email as it does for printed letters, with a few additional email options (specify from/to address for instance).

• **Merging Gift Strings into Email:** Lets you send emails that include custom gift strings based on a donor’s previous giving history provided that you’ve built an email template using the correct formula coding.

• **Graphical Emails:** Lets you create and save graphical email templates to use in emailing groups.

• **Scheduling Emails:** Lets you schedule email to send in the future. This is part of a very flexible feature that allows you set up emails to go out based on a number of different criteria, including date.

• **Email Server:** Emails are sent through the vendor’s email server, protecting you from blacklisting issues, and the vendor takes a series of steps to ensure email goes to donors’ inboxes rather than their spam filters. Additionally, users could choose to use a third-party broadcast email client, which takes measures to ensure email goes to donors’ inboxes rather than their spam filters.

• **Unsubscribes:** Donors can easily unsubscribe from emails without involving the organization.

• **Email Reports:** Lets you see the open rate, click-through rate and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports to allow you to follow up on email addressed that didn’t go through.

• **Automatic Emails:** Lets you set up automatic emails based on certain events. For example, you can schedule an email based on a criteria built in the query interface, to email any new donors added in the past week. You can also setup sequential emails, which are triggered over time (for instance, a user might receive one email immediately after submitting a form, and then another automatically a week later).

**Querying**

• **General Querying Approach:** Lets you create powerful queries with comparative ease by defining a series of criteria and filters. You can also define “exclusive not” queries—which exclude the results for one query from a different one.

• **Querying Based on Giving:** Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts, and number of gifts this year compared to prior years.

• **Querying on Any Field:** Lets you query using criteria from any database field, including custom fields.

• **Complex Queries:** Lets you create complicated queries using an unlimited number of criteria connected with logical “ands” and “ors.” They provide particularly powerful yet comparatively easy to use functionality in this area—you can define “exclusive not” queries that exclude the results for one query from a different one.

• **Expanding Queries:** Lets you easily limit or expand a query after you’ve generated the list by editing the query and making changes as required.

• **Saving Queries:** Lets you save queries to be run again later. Saved queries can be easily found through the “Views” dropdown menu.

• **Taking Actions on a List:** Once you have created a list, you can mail merge letters to that list, email to that list, update any field in the database for the list, or export the list.

• **Packaged Queries:** Includes the package queries underlying the standard reports.

**Reporting**

• **Standard Reports:** Lets you easily generate prepackaged reports including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This One (LYBUNT) or donors from Some Year but Unfortunately Not This One (SYBUNT).

• **Giving Reports:** Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.

• **Comparing Campaign Success:** Lets you compare success metrics for a number of different campaigns in one report, including the donations compared to the cost of the campaigns.

• **Reporting on Pledges:** Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts.
• **Ad Hoc Reports:** Can create basic Ad Hoc reports by choosing what columns you want to include, and adding groups or totals.

• **Custom Fields in Ad Hoc Reports:** Custom fields can be displayed within Ad Hoc reports.

• **Saving Reports:** Lets you save the queries that you use to create reports.

• **List of Favorite Reports:** Lets you quickly view favorite reports without navigating a much larger set by creating report folders for their favorite or custom reports.

• **Exporting Reports:** Lets you export reports to CSV or Excel format.

• **Distinguishing Reports:** The vendor points out the out-of-the-box KPI tools for campaigns, which can be displayed graphically as part of the user dashboard, as a distinguishing reporting feature.

• **Custom Reports:** Lets you create custom reports through the “new report builder”, by selecting fields to include from a sidebar of available fields, and apply the same filter logic available to queries.

• **Graphical Capabilities:** The system lets you add a wide variety of charts and graphs to reports.

• **Dashboard Placement:** Lets you create and display report results as charts or graphs on the user dashboard.

### Payment and Website Integration

• **Processing Credit Cards:** Lets you charge donors’ credit cards within the system, with a third-party payment application, at additional cost. Several options are available for download through the Salesforce AppExchange.

• **Recurring Gifts:** Lets you set up recurring gifts which are both logged and charged to donors’ credit cards at designated intervals, depending on the third-party payment processor you implement.

• **Web Signup Form:** People can easily sign up for your email list via an integrated signup form on your website. The client selects what fields to include via dropdown menus, and the system provides the HTML of the form, which can be pasted into the HTML of an existing web page.

• **Online Payments:** Lets you set up an online payment form on your website and pull online payments automatically into your database, at additional cost. This requires a separate module.

• **De-duping Online Actions:** Online signups or payments are manually imported and de-duped using the import functionality. Some third-party transaction providers offer the ability to automatically de-dupe online actions.

• **Event Registration:** Does not meet this criteria. This is possible depending on the transaction provider you implement.

• **Online Recurring Payments:** Does not meet this criteria. This is possible depending on the transaction provider you implement.

• **Distributed/ Team Fundraising:** Supporters cannot set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts. But the system can easily integrate with third-party fundraising tools available on the Salesforce AppExchange.

• **Membership Dues:** Lets members pay membership dues online, depending on the third-party transaction provider used, at additional cost.

• **Shopping Cart:** Does not meet this criteria. This is possible depending on the transaction provider you implement.

• **Payment Form Customization:** Does not meet this criteria. This is possible depending on the transaction provider you implement.

• **Transaction Fees:** Does not meet this criteria. This is possible depending on the transaction provider you implement.

• **Refunds:** You must issue refunds through your transaction provider and merchant account, and then log the refund into the system manually, depending on the transaction provider you choose.

• **Recurring Payments:** Does not meet this criteria. This is possible depending on the transaction provider you implement.

• **Mobile Giving:** Does not meet this criteria. This is possible depending on the transaction provider you implement.

• **Self Management of Donor Record:** Lets donors manage their own records, by setting up a donor portal, but requires a module at additional cost.
Tracking Other Interactions

- **Event Registrants:** Lets you track everyone who has registered for a particular event. However, this is done through the Campaigns functionality rather than event specific functionality, and is not robust.
- **Tracking Guests:** Lets you track non-paying guests for particular events, and distinguish them from those who paid, by creating a custom status.
- **Table Details:** Lets you manage table details for an event, including number of people per table, and the amount of gifts raised per table, but not the specific seating arrangements. Free or low-cost third-party tools can integrate with the system to provide this functionality.
- **Nametags:** Lets you easily create nametags for an event via segmentation and merge to Word template.
- **On-Site Registration:** Can quickly mark those attending as having arrived by clicking next to their name in the registration roster. Specific on-site ticket sale functionality depends on the third-party transaction provider used.
- **Volunteer Interests:** Lets you track a detailed profile of someone’s interests and aptitudes, including several different types of information, in order to match volunteers to jobs. This functionality requires Volunteers for Salesforce, a free third-party tool available on the Salesforce AppExchange.
- **Volunteer Work Tracking:** Lets you log volunteer activity for supporters, including date, duration and tasks, as well as the dollar equivalent for their time. This functionality requires Volunteers for Salesforce, a free third-party tool available on the Salesforce AppExchange.
- **Membership Tracking:** Provides functionality to track member levels, payments, and expiration dates.
- **Other Interactions:** Several third-party tools available on the SalesforceAppExchange offer support for education and patient services, among others. Some of these are available for free.

Customization

- **Customizing Values:** Lets you customize drop-down values for fields such as campaigns, type of relationships and many others. You can change list values for most fields, including the order of the list.
- **Custom Fields:** Lets you add a virtually unlimited number of custom fields (approximately 500 per object), which can be placed on most screens in the system.
- **Renaming Fields:** Lets you rename existing fields at no additional cost.
- **Moving or Deleting Fields:** Lets you move many (but not all) fields within the interface, or delete them altogether.
- **Custom Constituent Interactions:** Lets you create your own custom interactions, in order to track multiple pieces of data about a single interaction (for instance, to track date, title, and audience rating for the lectures delivered by your volunteers). However, you’ll need someone fairly technically savvy to set them up.
- **Vendor Customization:** While the vendor does not provide customization services, the system is extensively customizable by any qualified person. The vendor can refer you to one of many consultants who specialize in configuring systems based on the Salesforce platform.
- **Access to Source Code:** The source code for the Nonprofit Starter Pack (but not the Salesforce.com platform) is open source and publicly available, but cannot be modified in order to update or add functionality. However, an extensive API allows access to underlying data and application structure for modifying the system and developing new functionality.

Integration

- **Existing Integrations:** Can automatically exchange data with USPS, Data appending tools (WealthEngine, etc.), broadcast email clients (VerticalResponse, ExactTarget), Web CMS, online map tools (e.g. Google, Yahoo, Bing), Microsoft Outlook, and Google Apps, among others. Some of these plug-ins are available for free, while others are paid.
- **Data Export:** Lets you export all data visible to users into .CSV file format.
• **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data.

• **Programmatic Integration:** Provides an API to allow a programmer to create custom data feeds to an external system.

### Accounting Support

• **Existing Integrations:** While the system does not specially support any existing integrations with accounting systems, a number of third party integrations with various accounting systems are available on the Salesforce AppExchange.

• **Approach to Batching:** You can make and post batches in order to ease the reconciliation process with an accounting system. You would typically manually compare reports from the database and your accounting package to reconcile.

• **Reconciling a Batch:** Cannot mark a batch of payments as “reconciled with accounting” except through custom fields.

• **Controlling Reconciled Donations:** By default, there are no controls in place to prevent someone from editing a payment that has already been reconciled, and thus throwing the system out of balance with the accounting system. However, a client could add a validation rule that would display an error message if another user tried to edit reconciled payments.

### Ease of Use

• **Ease of Use for Novices:** Complex. The system is powerful but complicated. Most users will require training.

• **Speed for Expert Users:** Easy. Once you have mastered the system, it becomes quite quick to use. Terminology is easy to understand, and the system provides a fair amount of functionality to optimize time consuming tasks, like data entry.

### Support and Training

• **Training:** Salesforce.com provides training for the Salesforce platform, either via the internet or live, at additional cost. Training videos are available without cost. The partner community provides similar training for the Nonprofit Starter Pack.

• **Manuals and Documentation:** Provides an online library with videos and written documents. In addition an active online user community provides a Q&A section which connects users to the Salesforce Foundation technical team.

• **Support:** Salesforce.com provides an online help section, helpdesk chat from within the system, and unlimited email support. Salesforce partners also provide phone support, at additional cost.

### Installation and Maintenance

• **Installation and Maintenance:** As is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain, as the vendor takes care of the infrastructure and updates.

### Product Background

• **History:** Salesforce.com has been in business since 1999; the Salesforce Foundation since 2000. The Nonprofit Starter Pack has existed since 2008.

• **Clients:** Vendor reports about 15,000 total Salesforce.com Foundation clients in North America, approximately half of which using the Nonprofit Starter Pack.

• **Sustainability:** The Nonprofit Starter Pack is a free product. The vendor reports that the revenue earned from the sale of additional licenses covers the personnel and operational expenses required to support the system.
NetSuite’s SuiteDonor (formerly Do Good Better), offered as a free grant to qualifying nonprofits, offers sophisticated fundraising functionality with an integrated accounting system – geared at those with more advanced system needs. It’s organized around a well-organized and customizable dashboard that features key performance indicators and other useful information. You’ll generally find NetSuite SuiteDonor has all the basic functionality you need for donor management, though some areas could benefit from more automation. For example, a user would have to manually indicate a donation as having been acknowledged. While there is no easy way to merge gift strings, email and mail merge functionality are otherwise powerful and comprehensive. Querying functionality is strong, though possibly complex for novices, and the system offers integration with online donation forms. An array of standard reports is available, and reporting functionality incorporates charts and graphs as well as data-based tables. Users on the go will appreciate the ability to view these reports on their smartphones via a NetSuite app. Intrepid users with a little tech savvy can often build custom functionality, automation and other desired functionality without hiring a programmer.

Adding and Tracking Donations

- **Quick Search**: Lets you quickly search the database for an existing person from anywhere in the interface using a single keyword field, or a form that searches a variety of fields.
- **Quick Search on Custom Fields**: Lets you find a person by searching data entered into custom fields.
- **De-duping**: The system helps prevent duplicate entries when new people are entered by prompting you with a list of existing people that match user-selected criteria.
- **Adding a Gift**: Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.
- **Batching Gifts**: As an integrated accounting system, the system does not group donations into batches for reconciliation with accounting systems.
- **Gift Quick Entry Interface**: Lets you quickly enter a number of gifts at one time through a streamlined quick-entry interface which can be tailored on the fly with the appropriate fields and defaults for a particular set of gifts.
- **Updating Donor Info via Quick Entry**: The quick entry interface lets you automatically create new donors and updates donor contact information when appropriate.
• **Importing Gifts**: Lets you easily map and import donor and gift information in custom file formats.

• **Adding a Pledge**: Lets you enter pledges for future gifts, including the amount and scheduled date. Each pledge must be entered by hand, as opposed to generated based on a payment schedule.

• **Viewing Pledges on Gift Entry**: When using the interface to add new gifts, you can easily see existing pledges and apply gifts against them, but you are not specifically asked to do so.

• **Reminders for Pledges**: Staff members are notified with optional pop up reminders or emails when pledges are due.

• **Matching Gifts**: Lets you track matching gifts that need to be claimed from an employer by entering the donation and defining the donation as matching gift eligible. The system allows you to track which gifts have a match pending and allows you to associate a matching gift as they are received to the donation.

• **Stock Gifts**: The system can track both the unsold and sold values of stock gifts using custom fields.

• **Other Gift Types**: Supports tracking of tribute gifts, bequeathments, in-kind, or other gifts.

• **Campaigns or Funds**: Lets you assign gifts to a particular source, campaign or fund. Gifts can be split across funds.

• **Tracking Credit for Gifts**: Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like.

• **Gift Notes**: Lets you add freeform notes to a gift.

• **Attaching Documents to Gift or Activity Record**: The system lets a user upload and attach documents to gifts, activities, and/or proposals and stores them as part of the database.

• **Organizational Gifts**: Lets you associate gifts with an organization as opposed to individuals.

• **Zero Dollar Donations**: Lets you record zero dollar donations ($0) as in-kind gifts. Can record the value of a zero dollar donation.

• **Gifts “In Honor of” and Tributes**: Lets you record gifts as “given in honor of” or “in tribute to” as specific gift types. Can schedule notifications for gifts given in honor of or tribute gifts.

• **Premiums**: Lets you assign and track premiums and record tax deductible amount.

### Managing Donor Information

• **Multiple Contact Methods**: Lets you track as many phone numbers and addresses as you like, as well as mark the primary number and address, and track the donors’ preferred contact method. You can label each of them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method.

• **Multiple Addresses**: Does not let you specify which address should be used for certain types of mailings without customization.

• **Seasonal Addresses**: Lets you track people’s seasonal addresses only as “other address;” without effective dates and without automatically switching primary addresses for the appropriate timeframe.

• **Do Not Contact**: Lets you mark that a particular person should not be contacted, but staff must check a particular field to see it.

• **Relationships Between Donors**: Lets you track relationships between donors, and label them (for example, “family member,” “co-worker”) with custom relationship types.

• **Bi-Directional Relationships**: Lets you define relationships between donors as one-way (“would like to meet”), two-way (“spouse”) or directional (“boss; works for...”), but does not make it automatically bi-directional.

• **Viewing Relationships**: Lets you easily view everyone with whom a donor has relationships.

• **Householding**: A database record describes an entire household; individuals within that household are listed on that record with all of their contact info and actions.

• **Staff Relationships**: Lets you track connections between donors and as many of your own staff members as you like, along with what staff member is responsible for the relationship.

• **Donor Notes**: Lets you enter and view freeform notes about donors.
• **Manual Communication Log:** Lets you keep a manual log of communications such as phone calls or personal meetings.

• **Automatic Communications Log:** Automatically stores a record of all system-generated letters and emails for each donor.

• **Donor Dashboard:** Lets you easily see all recent communications and donor actions on one screen using the contact history screen.

• **Giving Totals:** Lets you easily see in one click or less from the main donor page all recent gifts, the number and amount of gifts this year, and total giving.

• **Donor Source:** Lets you track the source of a particular donor.

• **Organizational Profile:** Lets you create a profile for an organization and track the people who work for it.

• **Deceased Donors:** Lets you record donors as deceased by checking a field. Deceased donors are not automatically excluded from mailings.

• **Online Integrated Data Cleaning and Appending:** Integrates with PostCode Anywhere for address validation, but requires a third party application at additional cost.

• **Mobile Support:** Lets you access constituent records and run reports from mobiles via an application designed specifically for mobile access.

• **Attaching Documents to Donor Record:** Lets you attach documents to the donor record and stores them as part of the database; can also store document links.

• **Ability to Track/Integrate Social Media Information with Donor Record:** No ability to track social media information with the donor record. A third-party module that does this is available for the platform at additional cost.

• **Ability to Track Donor Social Media Activities in the System:** No ability to track social media information with the donor record. A third-party module that does this is available for the platform at additional cost.

### Prospecting and Proposals

• **Prospecting Workflow:** Lets you assign both a priority and a stage to a donor to manage a prospecting workflow.

• **Ticklers:** Lets you create a reminder for yourself for a particular task and date; shows the reminder at the appropriate time.

• **Creating Ticklers for Others:** Lets you create a reminder for someone else to do a task on a particular date.

• **Donor Research:** Does not provide any functionality to automatically match donor information to outside resources in order to provide more information on giving capability and priority.

• **Reporting on Asks:** Lets you create reports that show all the asks (called opportunities) that have been made, as well as the gifts.

• **Finding Your Prospects:** Lets you easily see the list of donors assigned to you as a solicitor by generating a segmentation report in the query interface.

• **Proposal Tracking:** Lets you track what proposals are due, what you’ve submitted and what has already been approved by a particular foundation.

• **Foundation Interest Tracking:** Lets you track a particular foundation's interest areas based on your organization's custom categories of interest.

• **Grant Tracking and Reporting:** Lets you track and report on grants separately from other gifts.

• **Thresholds and Action Triggers:** Lets you schedule reports to run report on thresholds. Can set up threshold-trigger actions via the workflow module.

### Permissions

• **Permissions:** You can grant individuals access at a functional level for a wide variety of system functions.

• **Field Level Permissions:** Lets you define granular user access to a group of key system fields.
Mail Merging Letters

- **General Mail Merge Approach**: Lets you create and save letter templates in Microsoft Word that include mail merged information. You can then mail merge data into those templates through the system, without the need to export data.

- **Mail Merging on a Mac**: Lets you mail merge letters on a Mac. As all letters are mail merged through the server, it doesn't matter what operating system is running on the desktop computer.

- **Flexibility of Letter and Thank You Templates**: Lets you flexibly create letter templates with complete control over layout, formats, logos, and images using their built-in word processor.

- **Personalizing Letters**: Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.

- **Tracking That Letters Were Sent**: Automatically logs for each donor that a letter was sent when you confirm that letters were printed.

- **One-off Thank Yous**: Lets you easily mail merge and print a single thank you letter from the gift entry interface by choosing from a number of letter templates.

- **Batch Processing of Thank Yous**: Lets you build a queue of people to be thanked by marking them at gift entry. You can then create letters for everyone in the queue at once.

- **Mail Merging Gift Strings**: Lets you create letters that include custom gift strings based on a donor’s previous giving history, but requires a complex, multi-step process.

- **Creating One-Off Letters**: Lets you mail merge a single letter using your choice of letter templates from a donor record.

- **Defining Group to Mail**: Lets you print letters through the system for a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event).

- **Printing Labels**: Lets you easily print labels for a set of people from the same query result page used to print letters.

Emailing

- **One-Off Email**: Lets you easily send email to particular individuals from their donor records.

- **Defining Group to Email**: Lets you send email through the system to a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event).

- **Merging Data into Emails**: Lets you create individual and group email that includes both standard text and “mail merge” type inserted data.

- **Merging Gift Strings into Email**: Lets you create letters that include custom gift strings based on a donor’s previous giving history, but requires a complex, multi-step process.

- **Graphical Emails**: Lets you create and save graphical email templates to use in emailing groups.

- **Scheduling Emails**: Lets you schedule email to send in the future.

- **Email Server**: Emails are sent through the vendor’s email server, protecting you from blacklisting issues, and the vendor takes a series of steps to ensure email goes to donors’ inboxes rather than their spam filters.

- **Unsubscribes**: Donors can easily unsubscribe from emails without involving the organization.

- **Email Reports**: Lets you see the open rate, click-through rate and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports to allow you to follow up on email addressed that didn't go through.

- **Automatic Emails**: Lets you set up automatic emails based on certain events.
Querying

- **General Querying Approach:** Lets you create powerful queries with comparative ease by choosing criteria from a well organized interface.

- **Querying Based on Giving:** Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts, and number of gifts this year compared to prior years.

- **Querying on Any Field:** Lets you query using criteria from any database field, including custom fields.

- **Complex Queries:** Lets you create complicated queries using an unlimited number of criteria connected with logical “ands” and “ors.”

- **Expanding Queries:** Lets you easily limit or expand a query after you’ve generated the list by saving the query and editing it again.

- **Saving Queries:** Lets you save queries to be run again later.

- **Taking Actions on a List:** Once you have created a list, you can mail merge letters to that list, email to that list, update any field in the database for the list, or export the list.

- **Packaged Queries:** The system includes several packaged queries.

Reporting

- **Standard Reports:** Lets you easily generate prepackaged reports including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This One (LYBUNT) or donors from Some Year but Unfortunately Not This One (SYBUNT).

- **Giving Reports:** Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.

- **Comparing Campaign Success:** Lets you compare success metrics for a number of different campaigns in one report, including the donations compared to the cost of the campaigns.

- **Reporting on Pledges:** Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts.

- **Ad Hoc Reports:** Supports Ad Hoc reports within the system which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos and headers.

- **Custom Fields in Ad Hoc Reports:** Custom fields can be displayed within Ad Hoc reports.

- **Saving Reports:** Lets you save reports that you create or modify.

- **List of Favorite Reports:** Lets you quickly view favorite reports without navigating a much larger set.

- **Exporting Reports:** Lets you export reports to Excel or CSV formats, among others.

- **Distinguishing Reports:** The vendor highlights the overall quality of the underlying reporting engine as distinguishing from other systems.

- **Custom Reports:** Lets you create custom reports through a reports wizard.

- **Graphical Capabilities:** Lets you add charts and graphs to reports, though these elements are not customizable.

- **Dashboard Placement:** Lets you place reports on the dashboard.

Payment and Website Integration

- **Processing Credit Cards:** Lets you charge donors’ credit cards within the system.

- **Recurring Gifts:** Lets you set up recurring gifts which are both logged and charged to donors’ credit cards at designated intervals, but requires a module at additional cost.

- **Web Signup Form:** People can easily sign up for your email list via an integrated signup form on your website.

- **Online Payments:** Lets you set up an online payment form on your website and pull online payments automatically into your database.
• **De-duping Online Actions**: Online signups or payments are logged to donors’ existing payment records by matching according to user-defined criteria.

• **Event Registration**: Lets you accept online registration fees for events, at additional cost, using Eventify, an add-on module.

• **Online Recurring Payments**: Lets donors set up recurring payments online (such as monthly donations) which are automatically charged to their credit cards but requires a module at additional cost.

• **Distributed/ Team Fundraising**: Supporters cannot set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts.

• **Membership Dues**: Members cannot pay membership dues online in a way that is automatically integrated with the system.

• **Shopping Cart**: Lets supporters purchase multiple items at once, as through a shopping cart.

• **Payment Form Customization**: Vendor provides an online payment form which can be customized to completely match your website, but requires a module at additional cost.

• **Transaction Fees**: Vendor does not charge a transaction fee for each payment.

• **Refunds**: Lets you issue refunds through the system. Donors can request refunds through the system but there is no automation; staff must process the request manually.

• **Recurring Payments**: Lets donors set up recurring payments online (such as monthly donations), which are automatically charged to their credit cards, but requires a module at additional cost.

• **Mobile Giving**: Can access donor portal via mobile phones, but requires a third party module at additional cost.

• **Self Management of Donor Record**: Lets donors manage their own records.

**Tracking Other Interactions**

• **Event Registrants**: Lets you track everyone who has registered for a particular event, with an add-on module, Eventify, at additional cost.

• **Tracking Guests**: Cannot distinguish non-paying guests for an event from those that paid, except by using custom fields.

• **Table Details**: Cannot manage any table details for an event, such as names of table captains, seating arrangements or the amount of gifts raised per table unless you configure this using custom fields.

• **Nametags**: Lets you create nametags for an event via their standard mail merge process.

• **On-Site Registration**: Does not provide any specific functionality to support on-site registration.

• **Volunteer Interests**: Does not provide any specific functionality to track interests in order to match volunteers with jobs.

• **Volunteer Work Tracking**: Lets you log volunteer activity for supporters, including date, duration, and tasks, as well as the dollar equivalent for their time via activities/tasks or timesheet.

• **Membership Tracking**: Does not provide any specific functionality to track member levels, payments, and expiration dates.

• **Other Interactions**: Does not provide built-in support for any constituent interactions other than what has been covered in this report.

**Customization**

• **Customizing Values**: Lets you customize drop-down values for fields such as campaigns, type of relationships, and many others.

• **Custom Fields**: Lets you add an unlimited number of custom fields, which can be placed on most screens in the system.

• **Renaming Fields**: Lets you rename existing fields.

• **Moving or Deleting Fields**: Lets you move or hide some fields within the interface.
• **Custom Constituent Interactions:** Lets you create your own custom interactions, in order to track multiple pieces of data about a single interaction (for instance, to track date, title, and audience rating for the lectures delivered by your volunteers), using the Notes.

• **Vendor Customization:** Vendor does not customize the system, but does respond to customer feedback. Clients generally hire implementation partners for customization work.

• **Access to Source Code:** Cannot access the source code in order to update or add functionality. However, an extensive API allows access to underlying data and application structure for modifying the system and developing new functionality.

### Integration

• **Existing Integrations:** Can automatically exchange data with Outlook, Box.net, Google Apps, Salesforce, Constant Contact, etc.

• **Data Export:** Lets you export all data visible to users into .CSV files.

• **Data Import:** Lets you import files of donor and gift information from .CSV files to the proper fields in the system.

• **Programmatic Integration:** Provides an API to allow a programmer to create custom data feeds to an external system.

### Accounting Support

• **Existing Integrations:** This is an integrated system that includes accounting functionality with which data is shared. The system has no integrations with external accounting systems.

• **Approach to Batching:** Accounting functionality is integrated. Does not help you to create batches of payments to external accounting systems.

• **Reconciling a Batch:** Cannot mark a batch of payments as “reconciled with accounting” except through custom fields.

• **Controlling Reconciled Donations:** Accounting functionality is integrated with the system. There are controls to prevent the editing of gifts by role, as well as after an accounting period has closed.

### Ease of Use

• **Ease of Use for Novices:** Moderate. The organization of the system relies on many different screens, each with lots of screens and buttons. There's a lot of information on each page, making it sometimes difficult to find features or fields. Less technically savvy users may feel initially overwhelmed.

• **Speed for Expert Users:** Moderate. Once you get used to the interface, it will be much faster to get things done, but there are still a lot of screens and fields to navigate through for many tasks. It doesn't provide a lot of specific functionality to make common tasks faster.

### Support and Training

• **Training:** Four-day virtual, instructor-led essentials class is included with the grant award. Internet-based training is available at no cost. Virtual, in-person and custom training classes are available from NetSuite and from partners at additional cost.

• **Manuals and Documentation:** Full online documentation, printed manuals for major areas of functionality, video training for most areas of product (free), fully documented developer tools, online user group including a dedicated forum for nonprofit users (both free).

• **Support:** Grant includes unlimited online case submission & phone case resolution. Additional support options available at additional cost.
Installation and Maintenance

- **Installation and Maintenance:** As is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain, as the vendor takes care of the infrastructure, connectivity to the internet, and updates.

Product Background

- **History:** NetSuite has been in business since 1998 and a publically traded company since 2007. SuiteDonor by NetSuite.org has been in use by grantees since 2008.
- **Clients:** Vendor reports over 400 grantees using SuiteDonor.
- **Sustainability:** NetSuite.org is NetSuite Inc’s signature corporate citizenship program and operates as a social enterprise. Discounted license fees cover the cost of operating the program.
On the higher pricing end of the systems in this report, Talisma Fundraising offers powerful fundraising capabilities. Users are presented with a number of useful and commonly used functions on the home screen, including favorite reports, saved queries, and frequently-accessed or favorite donor records. The system comes with a large amount of useful standard reports, powered by Crystal Reports, and the process for creating a custom or ad-hoc report is simplified with a minimum of steps through a straightforward report building wizard. While gifts and pledges are straightforward to enter, especially through the batch gift interface, the system doesn’t automatically notify users of outstanding or overdue pledges. Users may prefer to integrate with a third-party broadcast email client, as the email functionality within Talisma does not allow you to use a custom HTML template. Additional modules exist that provide robust member, volunteer, and event management, among others. The system is available either installed or online. Licensing for the installed version starts at $2,495 for a single user and unlimited records, and annual support and maintenance fees of $624; for three users, an organization would expect to pay $4,495 up front, with annual fees of $1,124. The online version starts at $1,872 per year for one user in a three-year contract, although first-year setup fees would bring the total cost in the first year to $6,672.

Adding and Tracking Donations

• **Quick Search:** Lets you quickly search the database for an existing person or organization from anywhere in the interface using a form that searches first name, last name, address, constituent ID, and groups. It includes a Soundex search so that correct spelling isn't critical.

• **Quick Search on Custom Fields:** Cannot create custom fields. Can find a person or organization by searching data entered into fields renamed by a user.

• **De-duping:** The system helps prevent duplicate entries when new people are entered by prompting you with a list of existing people that match an algorithm based on name and address fields. You are also required to do a search before adding a new donor record.

• **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.

• **Batching Gifts:** For ease of reconciling with accounting systems, each donation is automatically assigned to a batch when you process the donations that have not yet been receipted.

• **Gift Quick Entry Interface:** Lets you quickly enter a number of gifts at one time through a streamlined quick entry interface. You can tailor the defaults for a particular set of gifts, but you can’t change the fields on the fly. Defaulted values can be overridden individually.

• **Updating Donor Info via Quick Entry:** The import and quick entry interface lets you automatically create new donors and updates donor contact information when appropriate.

• **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats. The mapping information can be saved and reused.

• **Adding a Pledge:** Lets you enter pledges for future gifts, including the amount and scheduled date. The system can create a full set of pledges based a payment schedule, which you can then customize as needed.

• **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, you can easily see existing pledges and apply gifts against them, but you are not specifically asked to do so.

• **Reminders for Pledges:** Lets you run a report to see pledges that are near due, but staff members are not proactively notified. Or you can manually set a reminder to be proactively notified about a pledge.
• **Matching Gifts:** Lets you track matching gifts that need to be claimed from an employer through a feature that can automatically create a receivable against the employer when you enter the gift to be matched.

• **Stock Gifts:** The system can track both the unsold and sold values of stock gifts.

• **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, in-kind, or other gifts.

• **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign or fund, or split the gift across multiple of these, as well as to track the solicitation and sub-solicitation that generated a gift. Supports the above for both online and offline gifts.

• **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like.

• **Gift Notes:** The system lets you add freeform notes to a gift. These notes can be queried and reported on.

• **Attaching Documents to Gift or Activity Record:** The system does not let you upload and attach documents to gifts.

• **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.

• **Zero Dollar Donations:** The system records the value of goods, services, and other in-kind gifts.

• **Gifts “In Honor of” and Tributes:** Lets you track gifts given “in honor of,” and tributes. Can designate honorees and set notifications for honorees and donors. Can generate letters to honorees.

• **Premiums:** Lets you assign and track premiums and record tax deductible amount.

**Managing Donor Information**

• **Multiple Contact Methods:** Lets you track up to six phone numbers and as many addresses as you like, label them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method.

• **Multiple Addresses:** Lets you specify which address should be used for a specific mailing as part of the merge process.

• **Seasonal Addresses:** Lets you track people’s seasonal addresses, with effective dates.

• **Do Not Contact:** Lets you display a field near the top of the donor screen to notify staff that a particular person should not be contacted.

• **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, “family member,” “co-worker”) with custom relationship types.

• **Bi-Directional Relationships:** Lets you define relationships between donors as two-way (“spouse”) or directional (“boss; works for...”), and automatically assigns the appropriate relationships for both donors. You can define relationships between donors as one-way (“would like to meet”) only through comments.

• **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships.

• **Householding:** A database record describes a single individual and all their contact information and actions; you can connect them to others in their household through account linking.

• **Staff Relationships:** Lets you track connections between donors and as many of your own staff members as you like, along with what staff member is responsible for the relationship.

• **Donor Notes:** A large text area lets you enter and view freeform notes about donors. You can click on a note to get a more detailed view of it.

• **Manual Communication Log:** Lets you keep a manual log of communications such as phone calls or personal meetings. Manual communication logs are included in system queries and reports.

• **Automatic Communications Log:** Automatically stores a record of all system-generated letters and emails for each donor.

• **Donor Dashboard:** Lets you easily see all recent communications and donor actions on one screen.

• **Giving Totals:** Lets you easily see in one click or less from the main donor page all recent gifts, the number and amount of gifts this year, and total giving. You can configure this screen to choose the lists and aggregate stats that are most useful to you.
• **Donor Source:** Lets you track the source of a particular donor.
• **Organizational Profile:** Does not meet this criteria.
• **Deceased Donors:** Lets you record donors as deceased by checking a field. Deceased donors are excluded from mailings.
• **Online Integrated Data Cleaning and Appending:** Lets you link to USPS database, WealthEngine, Hoovers, and many other online sources of data by passing donor information from the system.
• **Mobile Support:** Lets you access constituent records from mobiles via a mobile web browser. The system is not optimized for mobile web browsers.
• **Attaching Documents to Donor Record:** Lets you attach documents to the donor record and store them as part of the database.
• **Ability to Track/Integrate Social Media Information with Donor Record:** Lets you track social media information with the donor record by recording this information as an email type.
• **Ability to Track Donor Social Media Activities in the System:** Does not meet this criteria.

### Prospecting and Proposals

• **Prospecting Workflow:** Lets you assign both a priority and a stage to a donor to manage a prospecting workflow, through an optional Major Gifts module, at additional cost. In addition, there is fairly advanced built-in functionality to manage major gift and capital campaigns.
• **Ticklers:** Lets you create a reminder for yourself for a particular task and date, and shows the reminder prominently on the homepage along with what is overdue, due, and other filters.
• **Creating Ticklers for Others:** Lets you create a reminder for someone else to do a task on a particular date.
• **Donor Research:** Automatically matches donor information to outside resources in order to provide more information on giving capability and priority via partnerships with WealthEngine and DonorSearch, at additional cost.
• **Reporting on Asks:** Lets you create reports that show all the asks that have been made, as well as the gifts.
• **Finding Your Prospects:** Lets you easily see the list of donors assigned to you as a solicitor by running a segmentation report.
• **Proposal Tracking:** Lets you track what proposals are due, what you’ve submitted and what has already been approved by a particular foundation, through an optional Major Gifts module, at additional cost. This functionality is very detailed, and includes likelihood, links to supporting docs, dates for a site visit, and many other fields.
• **Foundation Interest Tracking:** Lets you track a particular foundation’s interest areas based on your organization’s custom categories of interest.
• **Grant Tracking and Reporting:** Lets you track and report on grants separately from other gifts; can record grant probabilities, request and award amounts, payment types, and deliverables. Can record due dates and reminders for grants and assign them to any staff member.
• **Thresholds and Action Triggers:** No special functionality to support thresholds and action triggers.

### Permissions

• **Permissions:** You can grant groups access at a functional level for a wide variety of system functions.
• **Field Level Permissions:** Cannot define user or group permissions on a field-by-field basis.

### Mail Merging Letters

• **General Mail Merge Approach:** Lets you create and save letter templates in Microsoft Word that include mail merged information.
• **Mail Merging on a Mac:** Lets you mail merge letters on a Mac by downloading a file and merging manually.
• **Flexibility of Letter and Thank You Templates:** Lets you flexibly create letter templates in Word with complete control over layout, formats, logos, and images.
• **Personalizing Letters**: Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.

• **Tracking That Letters Were Sent**: Automatically logs for each donor that a letter was sent when you confirm that a batch of letters were printed.

• **One-off Thank Yous**: Lets you easily mail merge and print a single thank you letter from the gift entry interface by choosing from a number of letter templates.

• **Batch Processing of Thank Yous**: Lets you build a queue of people to be thanked by marking them at gift entry. You can then create letters for everyone in the queue at once. Alternatively, you can query to find all those who need to be thanked (for example, by finding recent donors who have not yet been thanked), and create letters for them all at once.

• **Mail Merging Gift Strings**: Lets you create letters that include custom gift strings based on a donor’s previous giving history, using Microsoft Word’s formula functionality.

• **Creating One-Off Letters**: Lets you mail merge a single letter using your choice of letter templates from a donor record.

• **Defining Group to Mail**: Lets you print letters through the system for a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event).

• **Printing Labels**: Lets you easily print labels for a set of people from the same query result page used to print letters.

**Emailing**

• **One-Off Email**: Lets you easily send email to particular individuals from their donor records and from the network view of relationships to that donor.

• **Defining Group to Email**: Lets you send email through the system to a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event).

• **Merging Data into Emails**: Lets you create individual and group email that includes both standard text and “mail merge” type inserted data.

• **Merging Gift Strings into Email**: Lets you send emails that include custom gift strings based on a donor’s previous giving history, using Microsoft Word’s formula functionality.

• **Graphical Emails**: Does not meet this criteria. HTML templates with graphics are possible if using Constant Contact, a third-party broadcast email client.

• **Scheduling Emails**: Cannot schedule email to send in the future. This is possible if using a third-party broadcast email client.

• **Email Server**: If you use Constant Contact, emails are sent via their servers, protecting you from blacklisting; Constant Contact takes measures to ensure email goes to donors’ inboxes rather than their spam filters.

• **Unsubscribes**: Donors can easily unsubscribe from emails without involving the organization if using Constant Contact.

• **Email Reports**: Does not provide any reports to help you understand how many opens or clicks an email generated. These reports are available if using Constant Contact.

• **Automatic Emails**: Lets you set up automatic emails based on certain events, like a web form submission, only through integration with Constant Contact.

**Querying**

• **General Querying Approach**: Lets you create powerful queries with comparative ease by defining a series of criteria and filters. You can also define “exclusive not” queries—which exclude the results for one query from a different one.

• **Querying Based on Giving**: Lets you find lists of donors based on a wide set of criteria, including amount given
this year, total amount given, number of gifts, and number of gifts this year compared to prior years.

- **Querying on Any Field:** Lets you query using criteria from any database field, including custom fields.
- **Complex Queries:** Lets you create complicated queries using an unlimited number of criteria connected with logical “ands” and “ors.” They provide particularly powerful yet comparatively easy to use functionality in this area—you can define “exclusive not” queries that exclude the results for one query from a different one.
- **Expanding Queries:** Lets you easily limit or expand a query after you’ve generated the list by saving the query and editing it again.
- **Saving Queries:** Lets you save queries to be run again later. Saved queries can be easily found as Filters under the Analysis tab, or on the user dashboard.
- **Taking Actions on a List:** Once you have created a list, you can mail merge letters to that list, email to that list, update any field in the database for the list, or export the list.
- **Packaged Queries:** Includes the packaged queries underlying the standard reports.

**Reporting**

- **Standard Reports:** Lets you easily generate prepackaged reports including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This One (LYBUNT) or donors from Some Year but Unfortunately Not This One (SYBUNT).
- **Giving Reports:** Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.
- **Comparing Campaign Success:** Lets you compare success metrics for a number of different campaigns, but you cannot see the cost of the campaigns.
- **Reporting on Pledges:** Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts. It includes a report to compare your past projections to actual performance, to judge the historical effectiveness of your projections.
- **Ad Hoc Reports:** Can create basic Ad Hoc reports by choosing what columns you want to include, and adding groups or totals.
- **Custom Fields in Ad Hoc Reports:** Cannot create custom fields. Fields that have been renamed by the user can be displayed within Ad Hoc reports.
- **Saving Reports:** Lets you save reports that you create or modify.
- **List of Favorite Reports:** Lets you quickly view favorite reports without navigating a much larger set.
- **Exporting Reports:** Lets you export reports to CSV, Excel, PDF, Word, or .txt format.
- **Distinguishing Reports:** The vendor highlights their large library of standard reports, and those created for clients at implementation, as distinguishing from other, similar systems.
- **Custom Reports:** Lets you create custom reports through a custom report wizard powered by Crystal Reports.
- **Graphical Capabilities:** Does not let you add charts and graphs to reports.
- **Dashboard Placement:** Lets you place favorite reports and up to four graphs on the dashboard.

**Payment and Website Integration**

- **Processing Credit Cards:** Lets you charge donors’ credit cards within the system, with an additional module at additional cost.
- **Recurring Gifts:** Lets you set up recurring gifts which are both logged and charged to donors’ credit cards at designated intervals. This requires a module at additional cost.
- **Web Signup Form:** People can easily request to receive emails via an integrated signup form on your website, but users must manually add them to the mailing list.
- **Online Payments:** Lets you set up an online payment form on your website and pull online payments automati-
cally into your database. They offer a complete form builder that allows you to create an unlimited number of forms and fully customize their fields and their position and order.

- **De-duping Online Actions**: Online signups or payments are logged to donors’ existing payment records by name or other contact information you can specify. These possible duplicates are presented for your confirmation before being logged in the system.

- **Event Registration**: Lets you accept online registration fees for events, at additional cost, using an add-on module.

- **Online Recurring Payments**: Lets donors set up recurring payments online (such as monthly donations) which are automatically charged to their credit cards, at additional cost. This requires an optional module.

- **Distributed/Team Fundraising**: Lets supporters set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts with an additional module at additional cost.

- **Membership Dues**: Lets members pay membership dues online, at additional cost, using a separate module.

- **Shopping Cart**: Lets supporters purchase multiple items at once, as through a shopping cart, with an optional module at additional charge.

- **Payment Form Customization**: Vendor provides an online payment form which can be customized to completely match your website.

- **Transaction Fees**: Vendor does not charge a transaction fee for each payment. The vendor recommends a specific merchant account, iATS, for which the fees are $22 per month plus $0.22 per transaction, and this includes the merchant fee.

- **Refunds**: You must issue refunds through the merchant account, and then log the refund into the system manually.

- **Recurring Payments**: Lets donors set up recurring payments online (such as monthly donations), which are automatically charged to their credit cards, but requires a module at additional cost.

- **Mobile Giving**: Can access the donor portal via mobile phones. The system is not optimized for mobile web browsers.

- **Self Management of Donor Record**: Does not allow donors to manage their own records.

### Tracking Other Interactions

- **Event Registrants**: Lets you track everyone who has registered for a particular event. Using the Events module, at additional cost.

- **Tracking Guests**: Lets you track non-paying guests for particular events, and distinguish them from those who paid, with the Events module, at additional cost.

- **Lets you manage table details for an event, including names of table captains, seating arrangements, and the amount of gifts raised per table, with the Events module, at additional cost.**

- **Nametags**: Lets you easily create nametags for an event via segmentation and merge to Word template.

- **On-Site Registration**: Does not provide any specific functionality to support on-site registration.

- **Volunteer Interests**: Lets you track a detailed profile of someone’s interests and aptitudes, including several different types of information, in order to match volunteers to jobs. This functionality requires an optional module at additional cost.

- **Volunteer Work Tracking**: Lets you log volunteer activity for supporters, including date, duration and tasks, but no dollar equivalent for their time. This functionality requires an optional module at additional cost.

- **Membership Tracking**: Provides functionality to track member levels, payments, and expiration dates through the Membership module (at additional cost).

- **Other Interactions**: In addition to the interactions we’ve covered here, the system offers support for planned giving, online fundraising, and Friends Asking Friends, through add-on modules at additional cost.
Customization

- **Customizing Values**: Lets you customize drop-down values for fields such as campaigns, type of relationships, and many others. You can change list values for most fields, including the order of the list.
- **Custom Fields**: Users cannot create their own custom fields.
- **Renaming Fields**: Lets you rename some, but not all, existing fields at no additional cost.
- **Moving or Deleting Fields**: Cannot move or delete existing fields.
- **Custom Constituent Interactions**: Cannot create custom interactions without vendor help, in order to track multiple pieces of data about a single interaction (for instance, to track date, title, and audience rating for the lectures delivered by your volunteers).
- **Vendor Customization**: Vendor does not customize the system, but does respond to customer feedback.
- **Access to Source Code**: Cannot access the source code in order to update or add functionality.

Integration

- **Existing Integrations**: Can automatically exchange data with WealthEngine, DonorSearch, Microsoft Great Plains Accounting, Microsoft Outlook, and Constant Contact.
- **Data Export**: Lets you export all data visible to users into another file format, such as .XLS, .PDF, .CSV, or .DOC, among others.
- **Data Import**: Lets you map different files of donor and gift information to the proper fields in the system, and import the data. Can do a batch import for the system install, and an “incremental” import for subsequent jobs that adds de-duplication functionality.
- **Programmatic Integration**: Does not allow a programmer to create custom data feeds to an external system.

Accounting Support

- **Existing Integrations**: Lets you automatically export data to Microsoft Dynamics Great Plains. Lets you create a file format tailored to upload easily into or QuickBooks, Sage 50, or other accounting systems.
- **Approach to Batching**: Lets you create batches of payments in order to ease the reconciliation process with an accounting system, including separate batches for checks, cash and credit payments.
- **Reconciling a Batch**: Cannot mark a batch of payments as “reconciled with accounting.” You can mark records as being passed to accounting, but this is not quite reconciliation.
- **Controlling Reconciled Donations**: There is an optional setting that disables the ability to edit a gift after the gift has been processed in a batch. Alternatively, you could restrict the group of people who can edit reconciled donations, or prohibit it altogether, using the (complex) advanced permissions functionality.

Ease of Use

- **Ease of Use for Novices**: Moderate. The layout is well organized and generally fairly understandable. However, it’s a complex system, and it will take some time to learn.
- **Speed for Expert Users**: Easy. Once you have mastered the system, it becomes quite quick to use. Terminology is easy to understand, and the system provides a fair amount of functionality to optimize time consuming tasks, like data entry. The query building tool provides a lot of control once you’ve learned how to use it.

Support and Training

- **Training**: Vendor provides training, either via the internet or live, at additional cost.
- **Manuals and Documentation**: Provides a written manual, as well as workbooks for use in staff training.
- **Support**: Vendor provides phone and email support for a flat fee that amounts to 25 percent of the license fee.
Installation and Maintenance

- **Installation and Maintenance**: As is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain, as the vendor takes care of the infrastructure and updates.

Product Background

- **History**: Talisma Fundraising, formerly known as Donor2, has been in business approximately 25 years.
- **Clients**: Vendor reports over 500 North American clients.
- **Sustainability**: The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.
APPENDICES
The research for this report followed a five-step process:

1. Define vendors to be included.

Based on a preliminary scan of the marketplace, we defined that systems should be included in the report using the following criteria:

- It’s intended for use by small organizations as their only database to manage online and offline donors, and is specifically set up to track multiple donations from one donor out-of-the-box.
- An organization with one user and 500 donors could purchase it for less than $10,500 in the first year.
- More than 100 organizations in North America had actually purchased it for less than $10,500 as of April 2013.
- More than 50 percent of its clients are nonprofits, exclusive of churches and membership organizations.
- Some official entity (whether a vendor or an open source governance group) proactively manages the continued development of the system.

We distributed invitations to vendors to fill out a preliminary survey about their systems, pricing, and number of clients in order to be considered for inclusion. We emailed the invitation directly to individual contacts at all vendors who were included in the last version of the report, who have contacted Idealware since that report to let us know they’d like to be included, or who were already known to Laura Quinn, Elizabeth Pope, or Robert Weiner, and then followed up via an additional email to vendors who did not respond.

We then distributed an open invitation to participate through the Idealware blog and social media channels, and on a number of email discussion lists including NTEN’s national list, Progressive Exchange, and Information Systems Forum.

2. Update review criteria.

In March 2013, Idealware contacted three low-cost donor management experts to seek their input on useful changes and additions to the criteria we used to review the systems in the 2011 report. Based on their input, we changed a handful of criteria and added about five new considerations to take into account in system reviews.

3. Complete summary reviews.

From April to October of 2013, Idealware conducted half-hour demos of all 36 systems included in this report. Each vendor was sent some preliminary questions about its system and a list of 10 high-level tasks to be demonstrated; these questions and tasks were designed to investigate the factors most often identified as important and that, in Idealware’s experience, most differentiate the systems. Based on these summary reviews, we created a rough preliminary scoring mechanism to compare the systems, and wrote a paragraph summarizing the strengths and weaknesses of each system.

Each summary paragraph was sent to the system vendor (or official representative) to allow them flag errors, and revised to ensure there were no inaccuracies. Vendors did not have final approval over their own review, but we allowed them to opt for us to not publish their review at all. None of the vendors chose this option.
4. Identify the top systems.

We selected 12 top systems to review in more detail based on our rough preliminary scoring mechanism. This scoring mechanism highly prioritized price and functionality to manage complex gift and donor information, but also considered usability, broadcast email functionality, querying and reporting, and configurability.

5. Complete detailed reviews.

For each of the 12 top systems, we conducted two- to three-hour demos, during which we reviewed each system for 147 features and attributes. Prior to the demos, vendors whose systems were included in the Top 10 of the 2011 report were sent the review text from that report to identify anything which may have changed in the years since. Our detailed reviews evaluate each of our top 10 systems on these 147 features. We sent the review text based on these criteria to the vendors to allow them to flag errors, and revised them to ensure there were no inaccuracies. Vendors did not have final approval over their own reviews.

Review criteria were grouped into 17 categories, and each system was given a rating for each category based on a rating framework (as defined in our How We Rate the Systems section).

After we conducted the detailed reviews, we dropped one system from our detailed reviews that didn’t perform as well as our summary review indicated it might. This left us with 11 top systems.
### APPENDIX B: HOW WE EVALUATED THE SYSTEMS

<table>
<thead>
<tr>
<th>Fair</th>
<th>Solid</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Adding and Tracking Donations</strong></td>
<td><strong>Lets you quickly enter a number of gifts at one time through a streamlined quick-entry interface. OR Lets you easily map and import donor and gift information in custom file formats.</strong></td>
<td><strong>Lets you find a person by searching data entered into custom fields.</strong></td>
</tr>
<tr>
<td><strong>• Lets you quickly search the database for an existing person.</strong></td>
<td><strong>The system provides functionality to allow at least TWO of the following THREE features:</strong> 1. Lets you record zero dollar donations. 2. Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like. 3. Lets you upload and attach documents to gifts, activities, and/or proposals and stores them as part of the database.**</td>
<td><strong>When using the interface to add new gifts, the system asks if you want to apply them against existing pledges.</strong></td>
</tr>
<tr>
<td><strong>• Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.</strong></td>
<td><strong>Lets you assign and track premiums, including the tax deductible amount, potentially via custom fields.</strong></td>
<td><strong>Lets you quickly enter a number of gifts at one time through a streamlined quick-entry interface which can be tailored with the appropriate fields and defaults for a particular set of gifts.</strong></td>
</tr>
<tr>
<td><strong>• Lets you enter pledges for future gifts, including the amount and scheduled date.</strong></td>
<td><strong>The system can create a full set of pledges based a payment schedule, which you can then customize as needed.</strong></td>
<td><strong>Lets you easily map and import donor and gift information in custom file formats without additional charge.</strong></td>
</tr>
<tr>
<td><strong>• Can track a note on a gift.</strong></td>
<td><strong>Lets you track the value of stock gifts without the use of custom fields.</strong></td>
<td><strong>The system provides functionality to allow at least TWO of the following THREE features:</strong> 1. Lets you record zero dollar donations. 2. Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like. 3. Lets you upload and attach documents to gifts, activities, and/or proposals and stores them as part of the database.**</td>
</tr>
<tr>
<td><strong>• Lets you add freeform notes to a gift.</strong></td>
<td></td>
<td><strong>• Lets you assign and track premiums, including the tax deductible amount, potentially via custom fields.</strong></td>
</tr>
<tr>
<td><strong>• Lets you associate gifts with an organization, as opposed to individuals.</strong></td>
<td></td>
<td><strong>• Lets you quickly enter a number of gifts at one time through a streamlined quick-entry interface which can be tailored with the appropriate fields and defaults for a particular set of gifts.</strong></td>
</tr>
<tr>
<td><strong>• Lets you record gifts given “in honor of” or “in tribute to.”</strong></td>
<td></td>
<td><strong>• The system can create a full set of pledges based a payment schedule, which you can then customize as needed.</strong></td>
</tr>
</tbody>
</table>

---

**AppeNDIX B: HOw we evALuATeD THe SYSTeMS**
## Managing Donor Information

<table>
<thead>
<tr>
<th>Fair</th>
<th>Solid</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Lets you track at least three phone numbers and addresses for each donor, label them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact methods.</td>
<td>• Lets you create a profile for an organization and track the people who work for it.</td>
<td>• Lets you track as many phone numbers and addresses as you like.</td>
</tr>
<tr>
<td>• Lets you track relationships between donors and label them (for example, “family member,” “co-worker”) with custom relationship types.</td>
<td>• Automatically stores a record of all system-generated letters and emails for each donor.</td>
<td>• Lets you track people’s seasonal addresses with effective dates, and automatically switches primary addresses for the appropriate timeframe.</td>
</tr>
<tr>
<td>• Lets you keep a manual log of communications such as phone calls or personal meetings.</td>
<td>• Lets you record donors as deceased.</td>
<td>• Lets you define which addresses should be used for specific types of mailings without the use of custom fields.</td>
</tr>
<tr>
<td>• Lets you mark that a particular person should not be contacted.</td>
<td>• Lets you track the source of a particular donor.</td>
<td>• Lets you track connections between donors and as many of your own staff members as you like, along with what staff member is responsible for the relationship.</td>
</tr>
<tr>
<td>• Lets you track the source of a particular donor.</td>
<td></td>
<td>• Lets you easily see all recent communications and donor actions on one screen.</td>
</tr>
</tbody>
</table>

## Social Media Integration

<table>
<thead>
<tr>
<th>Fair</th>
<th>Solid</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Lets you record social media profiles within the donor record, potentially via custom fields. OR Lets your supporters set up their own fundraising pages with text and images in order to solicit donations from their own contacts.</td>
<td>• Lets your supporters set up their own fundraising pages with text and images in order to solicit donations from their own contacts.</td>
<td>• Lets you capture a donor’s social media activities within the donor record without the use of custom fields.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Lets you import address or other information to the donor record from their social media profile(s).</td>
</tr>
<tr>
<td>Fair</td>
<td>Solid</td>
<td>Excellent</td>
</tr>
<tr>
<td>------</td>
<td>-------</td>
<td>-----------</td>
</tr>
<tr>
<td><strong>Prospecting and Proposals</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Lets you assign both a priority and a stage to a donor to manage a prospecting workflow, at least through custom fields.</td>
<td>• Lets you assign both a priority and a stage to a donor to manage a prospecting workflow without custom fields OR Lets you define and track a custom workflow.</td>
<td>• Provides advanced built-in functionality to track prospects OR Provides detailed extensive functionality to define and track a custom workflow.</td>
</tr>
<tr>
<td>• Lets you create a reminder for yourself for a particular task and date.</td>
<td>• Lets you track what proposals are due, what you’ve submitted and what has already been approved by a particular foundation OR Lets you track a particular foundation’s interest areas based on your organization’s custom categories of interest.</td>
<td>• Can see reminders you or others have set prominently displayed at the appropriate time.</td>
</tr>
<tr>
<td>• Lets you easily see the list of donors assigned to you as a solicitor by running a segmentation report.</td>
<td>• Lets you track and report on grants separately from other donations.</td>
<td>• Automatically matches donor information to outside resources in order to provide more information on giving capability OR Provides historical analysis of past estimates to help you improve estimates.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Lets you track a particular foundation’s interest areas based on your organization’s custom categories of interest without custom fields.</td>
</tr>
<tr>
<td><strong>Permissions</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Can define multiple user groups that have different access to system functionality.</td>
<td>• You can grant individuals access to granularly view, edit or delete data for a wide variety of system functions.</td>
<td>• Lets you define user or group permissions on a field-by-field basis.</td>
</tr>
<tr>
<td><strong>Mail-Merging Letters</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Can mail merge data into letter templates without exporting data from the system.</td>
<td>• Automatically logs for each donor that a letter was sent when you confirm that a batch of letters were printed.</td>
<td>• Lets you create letters that include custom gift strings based on a donor’s previous giving history.</td>
</tr>
<tr>
<td>• Lets you print letters through the system for a particular group of people who meet a sophisticated set of criteria.</td>
<td>• Lets you easily mail merge and print a single thank you letter from the gift entry interface by choosing from a number of letter templates.</td>
<td>• Lets you flexibly create letter templates in Word or OpenOffice with complete control over layout, formats, logos and images.</td>
</tr>
<tr>
<td>• Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.</td>
<td>• Lets you easily print labels for a set of people from the same query result page used to print letters.</td>
<td>• Lets you build a queue of people to be thanked by marking them at gift entry. You can then create letters for everyone in the queue at once.</td>
</tr>
</tbody>
</table>
# Emailing

<table>
<thead>
<tr>
<th>Fair</th>
<th>Solid</th>
<th>Excellent</th>
</tr>
</thead>
</table>
| • Lets you easily send email to particular individuals from their donor records.  
  • Lets you send email through the system to a group of people who meet a sophisticated set of criteria. | • Lets you create and save graphical email templates to use in emailing groups.  
  • Lets you create individual and group email that includes both standard text and “mail merge” type inserted data.  
  • Donors can easily unsubscribe from emails without involving the organization.  
  • Lets you see the open rate, click-through rate and unsubscribe rate for each email. | • Lets you send emails that include custom gift strings based on a donor’s previous giving history.  
  • Lets you create and save graphical email templates to use in emailing groups.  
  • Lets you schedule email to send in the future.  
  • Emails are sent through the vendor’s email server, protecting you from blacklisting issues, and the vendor takes a series of steps to ensure email goes to donors’ inboxes rather than their spam filters. |

# Querying

<table>
<thead>
<tr>
<th>Fair</th>
<th>Solid</th>
<th>Excellent</th>
</tr>
</thead>
</table>
| • Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts and number of gifts this year compared to prior years.  
  • Lets you save queries to be run again later.  
  • Once you have created a list, you can mail merge letters to that list, email to that list, update any field in the database for the list, or export the list. | • Lets you query using criteria from any database field, including custom fields if included in the system.  
  • Lets you create complicated queries using an unlimited number of criteria connected with logical “ands” and “ors”.  
  • Lets you easily limit or expand a query after you’ve generated the list by saving the query and editing it again. | • Lets you create powerful queries with comparative ease.  
  • The system includes pre-built queries. |

# Reporting

<table>
<thead>
<tr>
<th>Fair</th>
<th>Solid</th>
<th>Excellent</th>
</tr>
</thead>
</table>
| • Lets you easily generate prepackaged reports, including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This One (LYBUNT) or donors from Some Year but Unfortunately Not This One (SYBUNT).  
  • Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query. | • Lets you save reports that you create or modify.  
  • Lets you compare success metrics for a number of different campaigns.  
  • Lets you export any report to a CSV or Excel format. | • Supports ad hoc reports within the system which can include and filter by nearly any field displayed to users, including custom fields.  
  • Lets you quickly view favorite reports without navigating a much-larger set.  
  • Lets you either add a logo to an ad hoc report, OR include data-based charts and graphs in an ad hoc report.  
  • Lets you compare success metrics for a number of different campaigns, including the cost of the campaigns. |
### Payment and Web Site Integration

<table>
<thead>
<tr>
<th>Fair</th>
<th>Solid</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Lets you charge donors’ credit cards within the system, potentially via a third-party.</td>
<td>• Lets you set up an online payment form on your Web site and pull online payments automatically into your database, without the need for a programmer.</td>
<td>• Lets donors set up recurring payments online (such as monthly donations) which are automatically charged to their credit cards.</td>
</tr>
<tr>
<td>• Lets people easily sign up for your email list via an integrated sign-up form on your website.</td>
<td>• Lets you accept online registration fees for events, including multiple ticket prices (such as a VIP ticket) and meal options.</td>
<td>• Lets members pay membership dues online.</td>
</tr>
<tr>
<td>• Lets donors manage their own records online. OR Lets donors give via mobile devices.</td>
<td>• Lets donors manage their own records online. OR Lets donors give via mobile devices.</td>
<td>• Lets donors manage their own records online. OR Lets donors give via mobile devices.</td>
</tr>
</tbody>
</table>

### Tracking Events

<table>
<thead>
<tr>
<th>Fair</th>
<th>Solid</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Lets you track who has registered for a particular event, potentially with custom fields intended to track custom interactions.</td>
<td>• Lets you track who has registered for a particular event without using custom fields.</td>
<td>• Lets you track non-paying guests for particular events, and distinguish them from those who paid, without using custom fields.</td>
</tr>
<tr>
<td>• Lets you easily create nametags for an event.</td>
<td>• Lets you manage table details for an event, including seating arrangements, and the amount of gifts raised per table, without using custom fields.</td>
<td>• Lets you manage table details for an event, including seating arrangements, and the amount of gifts raised per table, without using custom fields.</td>
</tr>
</tbody>
</table>

### Tracking Other Built-In Interactions

<table>
<thead>
<tr>
<th>Fair</th>
<th>Solid</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Provides at least substantial custom field functionality to allow you to reasonably support some basic volunteer or membership information.</td>
<td>Provides two of the following: • Lets you log volunteer activity for supporters, including date, duration and tasks. • Provides functionality to track member levels, payments and expiration dates. • Provides substantial built-in support for at least one interaction not covered in the report.</td>
<td>Provides three of the following • Lets you track a detailed profile of someone's interests and aptitudes, in order to match volunteers to jobs. • Lets you log volunteer activity for supporters, including date, duration and tasks, as well as the dollar equivalent for their time. • Provides functionality to track member levels, payments and expiration dates • Provides substantial built-in support for a number of interactions not covered in the report.</td>
</tr>
<tr>
<td>Fair</td>
<td>Solid</td>
<td>Excellent</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>------------------------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Customization</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Lets you customize drop-down values for fields such as campaigns, type of relationships and many others.</td>
<td>• Lets you add at least fifty custom fields.</td>
<td>• Lets you create your own custom interactions, in order to track multiple pieces of data about a single interaction or vendor often adds fields or features to customer requests without charge.</td>
</tr>
<tr>
<td>• Lets you add at least a few custom fields.</td>
<td>• Custom fields can be placed on many screens in the system.</td>
<td>• Lets you move existing fields within the interface, or delete them altogether.</td>
</tr>
<tr>
<td></td>
<td>• Lets you create your own custom interactions, in order to track multiple pieces of data about a single interaction.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Custom fields can be placed on many screens in the system.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Lets you create your own custom interactions, in order to track multiple pieces of data about a single interaction.</td>
<td></td>
</tr>
<tr>
<td><strong>Integration</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Can export all data visible to users and import donor and gift data or provides a method to allow a programmer to create custom data feeds to an external system.</td>
<td>• Lets you export all data visible to users into another file format.</td>
<td>• Lets you export all data visible to users into another file format.</td>
</tr>
<tr>
<td></td>
<td>• Lets you map different files of donor and gift information to the proper fields in the system, among a variety of fields, and import the data.</td>
<td>•Lets you map different files of donor and gift information to the proper fields in the system, and import the data.</td>
</tr>
<tr>
<td></td>
<td>• Lets you import data without an additional charge.</td>
<td>• Provides a method to allow a programmer to create custom data feeds to an external system, with access to most fields in the system.</td>
</tr>
<tr>
<td><strong>Accounting Support</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Can export transactions in order to sync them with an accounting system.</td>
<td>• Can create and track accounting batches in order to ease the reconciliation process with an accounting system.</td>
<td>• Can mark a batch of payments as “reconciled with accounting.”</td>
</tr>
<tr>
<td></td>
<td>• Can create and track accounting batches in order to ease the reconciliation process with an accounting system.</td>
<td>• There are controls in place to prevent unauthorized people from editing a payment that has already been reconciled.</td>
</tr>
<tr>
<td><strong>Ease of Use</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Users can use the system, given enough training.</td>
<td>• The system is at least Moderately easy to use for both novices and experts.</td>
<td>• The system is at least Moderately easy to use for both novices and experts, and is Easy for one of these.</td>
</tr>
<tr>
<td><strong>Support and Training</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Training and support is available, at least from the community.</td>
<td>• Provides extensive documentation, including online documentation, a user community or videos.</td>
<td>• The vendor provides initial training over the Internet at no additional cost.</td>
</tr>
<tr>
<td>• Provides written documentation.</td>
<td>• Training and support is available from vendor, potentially at an additional charge.</td>
<td>• The vendor provides phone support for under $500 per year.</td>
</tr>
<tr>
<td>Ease of Installation and Maintenance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>--</td>
<td></td>
</tr>
<tr>
<td>- The system can be installed and maintained by a reasonably qualified IT staff.</td>
<td>- As is typical with an installed system, you will need to install the system to your desktops, maintain your own infrastructure, and install your own updates.</td>
<td>- As is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain.</td>
</tr>
<tr>
<td>- The system requires its own server, which you will need to install and maintain.</td>
<td>- The amount of work needed to maintain the system is typical for systems of this type.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Product Background</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>- The vendor reports more than 100 clients. OR The system is built upon a widely-used platform, which itself is used by more than 500 clients.</td>
<td>- The system has been in use for more than three years OR The vendor reports more than 500 clients. OR The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.</td>
</tr>
</tbody>
</table>
APPENDIX C: AUTHORS AND CONTRIBUTORS

Authors

Elizabeth Pope, Director of Research and Operations
Elizabeth Pope leads Idealware’s software research projects, conducting interviews and product demos, writing articles and reports, and helping to design project methodology. She has a B.A. in History from Columbia University and also earned an M.S. in Library and Information Science from the University of Illinois at Champaign-Urbana. Before joining Idealware, Elizabeth was the Assistant Director of the Center for Oral History at Columbia University and served as a Federal government archivist for the National Archives branch in New York City. She has used Exceed! Basic in previous positions and Salesforce as part of her work at Idealware. Otherwise, she has no experience using any of the tools profiled in this report.

Andrea Berry, Director of Partnerships and Learning
Andrea oversees Idealware’s training activities. She brings a breadth of experience with fundraising software, particularly as it relates to small nonprofits, and has worked as a consultant with nonprofits across New England to help identify appropriate donor management software. As Idealware’s fundraising system expert, she aided in defining review criteria, creating the list of top ten vendors, and participating in many of the detailed system reviews. She has used both Salsa by DemocracyInAction and Salesforce.com extensively as Idealware’s constituent databases. Other than that, she has no experience using or implementing any of these systems.

Laura S. Quinn, Executive Director
Laura defined the methodology used for the report, participated in some of the reviews, and managed analysis, recommendations, writing and comparisons in the report. She has used both Salsa by DemocracyInAction and Salesforce.com extensively as Idealware’s constituent databases. Other than that, she has no experience using or implementing any of these systems.

Kyle Andrei, Research Analyst
Kyle is responsible for researching software through demos, interviews, and surveys, and using that information to create Idealware’s reports and articles. In addition, Kyle also produces Idealware’s Ask Idealware videos, drawing on his broadcasting experience. Kyle is a graduate of Indiana State University, where he split his time between managing the student radio station, researching video game communication and working on local elections. He has used both Salsa by DemocracyInAction and Salesforce.com as Idealware’s constituent databases. Other than that, he has no experience using or implementing any of these systems.

Contributors

Many thanks to those who provided comments on our criteria for review:

Eric Leland, FivePaths
Keith Heller, Heller Consulting
Tricia Fitzgerald, Heller Consulting
Robert Weiner, Robert L. Weiner Consulting
It often makes sense to hire a consultant or firm to help you implement or make the most of your donor management system. To help you find one, we’ve compiled a number of the organizations and individuals that offer services in this area.

These are paid listings; each firm paid a sliding scale fee to be included, based on the size of their firm. Those with logos and descriptions paid more for these elements to be included. Idealware has not assessed the services provided, but only aggregated the information given to us by the firms. Conduct your own due diligence before hiring any firm.

<table>
<thead>
<tr>
<th>WIDE NATIONAL PRESENCE—MORE THAN A DOZEN LOCATIONS</th>
<th>Top Donor Management Systems</th>
</tr>
</thead>
<tbody>
<tr>
<td>These firms have on-the-ground staff members in more than a dozen cities.</td>
<td>Impartial software selection and implementation</td>
</tr>
<tr>
<td>JCA, Inc.</td>
<td>Impartial software selection and implementation</td>
</tr>
<tr>
<td>Jacobson Consulting Applications, Inc</td>
<td><a href="http://www.jcainc.com">www.jcainc.com</a></td>
</tr>
<tr>
<td>JCA has 25 years of experience implementing enterprise donor systems. With expert staff and deep experience with complex technical and functional consulting, JCA serves the nation's largest NPOs. 888-446-4588 or <a href="mailto:smarter@jcainc.com">smarter@jcainc.com</a></td>
<td></td>
</tr>
<tr>
<td>McGladrey LLP</td>
<td>mcgladrey.com</td>
</tr>
<tr>
<td>Experience The Power of Being Understood.® We offer deep not-for-profit experience in assurance, tax and consulting. Our goal is to understand your organization so you can focus on your mission. Matt Kenney, 800-274-3978 or <a href="mailto:erp@mcgladrey.com">erp@mcgladrey.com</a></td>
<td></td>
</tr>
</tbody>
</table>

---

WISH YOU HAD FREE ACCESS TO OVER 3,000 TECH EXPERTS? NOW YOU DO.

Connect with

the communityCORPS

tech volunteers powering social good

www.thecommunitycorps.org
# NEW ENGLAND

<table>
<thead>
<tr>
<th>Database Designs</th>
<th><a href="http://www.dbdes.com">www.dbdes.com</a></th>
<th></th>
<th>Top Donor Management Systems</th>
</tr>
</thead>
<tbody>
<tr>
<td>Database Designs Associates Inc</td>
<td></td>
<td></td>
<td>Salesforce.com</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Convio</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>CiviCRM</td>
</tr>
<tr>
<td><strong>Boston, MA</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Boston-based consulting firm. Our focus is planning &amp; implementing web and data systems in nonprofit &amp; public sectors. Services include: CRM, case &amp; program management, donation &amp; grant tracking.</td>
<td>Steven Backman, 617-423-6355 or <a href="mailto:dbdes_info@dbdes.com">dbdes_info@dbdes.com</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Karen Schaller Fundraising Database Consultant</td>
<td><a href="http://www.karenschaller.com">www.karenschaller.com</a></td>
<td></td>
<td>GiftWorks</td>
</tr>
<tr>
<td></td>
<td>Exeter, ME</td>
<td></td>
<td>Little Green Light</td>
</tr>
<tr>
<td></td>
<td>Services include data evaluation for any fundraising database, and data clean up, data conversion and training for listed software specialties.</td>
<td></td>
<td>Sustain</td>
</tr>
<tr>
<td></td>
<td>Karen Schaller, 207-379-2032 or <a href="mailto:karen@karenschaller.com">karen@karenschaller.com</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Connected Cause</td>
<td>theconnectedcause.com/dmsguide/</td>
<td></td>
<td>Impartial software selection and implementation</td>
</tr>
<tr>
<td><strong>Boston, MA</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Connected Cause is a place for nonprofit experts to share perspective, guidance and best practices for using today’s technology effectively, and provide thought leadership for all nonprofits.</td>
<td>Jeffrey Appell, 510-969-2761 or <a href="mailto:info@theConnectedCause.com">info@theConnectedCause.com</a></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

**Experts Working Together**

Shared knowledge brings exceptional results. The Connected Cause members combine our cross-industry experience to help nonprofits in these areas:

- System Assessment & Selection
- Design & Development
- Data Management & Business Processes
- Communication & Campaigns
- Integration & Custom Solutions
- Training & Support

**Is it time to evaluate your Donor Management System?**

Visit us at [www.TheConnectedCause.com](http://www.TheConnectedCause.com) for the resources and expertise you need to get the most out of your online systems.
## NEW ENGLAND

### Yellow Brick Road Consulting

- **South Strafford, VT**
  - Philanthropy, board leadership, OD, planning, and professional facilitation. Past board chair of the Association of Philanthropic Counsel. ‘Development assessments’ in “The Feasibility Study”
  - Anne Peyton, CPF CFRE, 802-291-0950 or anne@yellowbrickroadconsulting.com

### Trimble Consulting Group

- **Norwalk, CT**
  - Regina Trimble, 203-427-8190 or rtrimble@trimbleconsultinggroup.com

## NEW YORK & NEW JERSEY

### Community IT Innovators

- **New York, NY**
  - For 20 years Community IT has provided guidance tailored to organizations’ unique donor management and information system needs. We are product agnostic, so we help find the best solution for you.
  - David Deal, 202-449-6701 or ddeal@communityit.com

---

"At SIECUS, information is everything. From advocacy to education, we rely on Sinu’s enterprise-class communication tools and predictable pricing."

Jason Osher, COO at SIECUS

---

NYC Office: 212 380 1230
DC Office: 202 800 7510
www.sinu.com

Affordable all-inclusive IT solutions for nonprofits designed with your organization and its mission in mind.

Sinu. Your IT Department.
## NEW YORK & NEW JERSEY

### m3 Development

**www.m3development.net**  
**Marlboro, NJ & Manorville, NY**  
m3 Development is a full service consulting firm offering tailored solutions and counsel serving NPOs fundraising; campaign; board development; capacity building; search; & strategic planning needs.  
Michael Baker, CFRE, 732-245-9868 or mbaker@m3development.net

### Sinu Inc.

**www.sinu.com**  
**New York, NY**  
Sinu provides IT functionality and unlimited IT support to nonprofits for one affordable all-inclusive price to help streamline your technology, increase your productivity and save you money.  
David Owen, 877-692-7468 or dowen@sinu.com

### Management Solutions for Nonprofit Organizations, LLC

**www.msnony.com**  
**Bronxville, NY**  
Duff Batchelder, 914-779-4497 or duff@msnony.com

## MID ATLANTIC

### 501cTECH

**www.501ctech.org**  
**Washington, DC**  
501cTECH is a nonprofit delivering technology solutions for other nonprofits serving the DC area. Our goal is to help nonprofits advance their core missions through the use of innovative technology.  
Julie Chapman, 202-234 9670 or jchapman@501ctech.org

### AGH Strategies

**aghstrategies.com**  
**Washington, DC**  
CiviCRM specialists in Washington, DC, working with Drupal, Joomla, and WordPress. We do both large projects and small tweaks, and we offer on-call support and custom training, plus public classes.  
Andrew Hunt, 202-248-6400 or info@aghstrategies.com

### Beth Saunders Consulting

**bethsaundersconsulting.com**  
**Philadelphia, PA**  
Let’s get it right! Ensure Salesforce is designed to fit your current and future needs. I’ve been there; from here I will assure you get the most from SF. Analysis + Design + Implementation + Support  
Beth Saunders, 484-213-5247 or beth@bethsaundersconsulting.com
## MID ATLANTIC

<table>
<thead>
<tr>
<th>Top Donor Management Systems</th>
<th>Chapman Cubine Adams + Hussey</th>
<th>Community IT Innovators</th>
<th>Droz Marketing</th>
</tr>
</thead>
<tbody>
<tr>
<td>ccah.com</td>
<td>Arlington, VA</td>
<td>communityit.com</td>
<td><a href="http://www.drozmarketing.com">www.drozmarketing.com</a></td>
</tr>
<tr>
<td>We’re driven by the question, What’s Next? What’s next in multi-channel marketing? We embrace new ideas, innovative solutions and creative tactics that help our clients break through the clutter. Kim Cubine, 703-248-0025 or <a href="mailto:info@ccah.com">info@ccah.com</a></td>
<td>For 20 years Community IT has provided guidance tailored to organizations’ unique donor management and information system needs. We are product agnostic, so we help find the best solution for you. David Deal, 202-449-6701 or <a href="mailto:ddeal@communityit.com">ddeal@communityit.com</a></td>
<td>Droz Marketing helps nonprofits achieve greater impact through highly effective marketing, design, branding and social media strategies. Droz delivers solutions with measurable, manageable outcomes. Dan Droz, 412-338-1818 or <a href="mailto:info@droz.com">info@droz.com</a></td>
<td></td>
</tr>
</tbody>
</table>

### Technology is not only our work.

**It’s our mission and our passion.**

When it comes to donor management, one size does not fit all. We help identify your needs and find the right solution for your organization.

- Needs requirements
- Software selection
- Salesforce customization
- Outsourced IT
- Cloud migration
- Technology planning

**Questions? Let’s talk.**

Abigail Goliber • AGoliber@501cTECH.org

www.501cTECH.org

Empowering Nonprofits Through Technology
## MID ATLANTIC

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>KAG provides nonprofit organizations with tailored and flexible program evaluation services. We help refine processes and demonstrate outcomes to support fundraising and organizational development.</td>
<td></td>
<td>Impartial software selection and implementation</td>
</tr>
<tr>
<td>Trina Willard, 804-564-6969 or <a href="mailto:Trina@KnowledgeAdvisoryGroup.com">Trina@KnowledgeAdvisoryGroup.com</a></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OutreachU</th>
<th><a href="http://www.Outreach-U.com">www.Outreach-U.com</a></th>
<th>Pittsburgh, PA</th>
</tr>
</thead>
<tbody>
<tr>
<td>OutreachU™ is a series of principles that bring focus to your Outreach/Development activities resulting in increased customer loyalty and increased accountability.</td>
<td></td>
<td>DonorPro</td>
</tr>
<tr>
<td>John Chamberlin, 412-992-6852 or <a href="mailto:john.chamberlin@rockpaperscissorschute.com">john.chamberlin@rockpaperscissorschute.com</a></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sinu Inc.</th>
<th><a href="http://www.sinu.com">www.sinu.com</a></th>
<th>Washington, DC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sinu provides IT functionality and unlimited IT support to nonprofits for one affordable all-inclusive price to help streamline your technology, increase your productivity and save you money.</td>
<td></td>
<td>Impartial software selection and implementation</td>
</tr>
<tr>
<td>David Owen, 877-692-7468 or <a href="mailto:dowen@sinu.com">dowen@sinu.com</a></td>
<td>BlackBaud products FundEZ Salesforce.com</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>The EHL Consulting Group, Inc.</th>
<th><a href="http://www.ehlconsulting.com">www.ehlconsulting.com</a></th>
<th>Willow Grove, PA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Our commitment to the nonprofit community and our knowledge of the philanthropic arena make EHL Consulting a sought-after source for innovative approaches to challenging and critical projects.</td>
<td></td>
<td>Impartial software selection and implementation</td>
</tr>
<tr>
<td>Robert Evans, 215-830-0304 or <a href="mailto:revans@ehlconsulting.com">revans@ehlconsulting.com</a></td>
<td>DonorPerfect</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Trellon</th>
<th><a href="http://www.trellon.com">www.trellon.com</a></th>
<th>Washington, DC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trellon empowers organizations with effective tools and strategies for fundraising and donor management. We offer solutions that integrate directly with your CMS and social media campaigns.</td>
<td></td>
<td>CiviCRM Salesforce.com CRM Core</td>
</tr>
<tr>
<td>Michael Haggerty, 240-643-6561 or <a href="mailto:heytrellon@trellon.com">heytrellon@trellon.com</a></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CEDC.org</th>
<th>cedc.org</th>
<th>Washington, DC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laryn Kragt Bakker, 202-635-7987 or <a href="mailto:web@cedc.org">web@cedc.org</a></td>
<td></td>
<td>CiviCRM</td>
</tr>
<tr>
<td>SOUTH</td>
<td>Top Donor Management Systems</td>
<td></td>
</tr>
<tr>
<td>-------</td>
<td>-----------------------------</td>
<td></td>
</tr>
</tbody>
</table>
| **AGH Strategies** | aghstrategies.com  
Athens, GA  
CiviCRM specialists working with Drupal, Joomla, and WordPress. We do both large projects and small tweaks, and we offer on-call support and custom training, plus public classes.  
Andrew Hunt, 202-248-6400 or info@aghstrategies.com | CiviCRM |
| **Emphanos LLC** | emphanos.com  
Dallas, TX  
Full service professional CiviCRM and Drupal solutions provider: Data migrations, implementation and customizations, data dashboards, mobile apps, data migrations out of Raiser’s Edge and Salesforce.  
Young-Jin Kim, 312-970-1276 or info@emphanos.com | CiviCRM  
Drupal  
Red Hen CRM |
| **KELL Partners** | www.kellpartners.com  
Austin, TX  
We love nonprofits. We love how Salesforce can be your donor database and much more. So far we’ve helped over 650 nonprofits use this highly flexible technology from Salesforce. We love what we do.  
Sandra Jensen, 512-850-5355 or info@kellpartners.com | Salesforce.com  
Nonprofit Starter Pack |

We ♥ Nonprofits. + We ♥ Salesforce. = ⭐⭐⭐⭐⭐  
4.9 out of 5 on AppExchange  
[ WE GOT THIS. ]

www.kellpartners.com  
512.850.KELL
SOUTH
Nonprofit Software Specialists, LLC
www.npsspecialists.com/
Nashville, TN
NSS provides nonprofits and schools with expert, personalized constituent relationship management (CRM) system training, audits, cleanup, configuration, & software selection to support their mission.
Felicia Terry, CNC, 615-301-1726 or felicia@npsspecialists.com

TechBridge, Inc.
www.techbridge.org
Atlanta, GA
TechBridge is a nonprofit who provides subsidized consulting services to design and implement a custom-developed Salesforce solution to meet your donor and information management needs.
John Banning, 404-879-5412 or info@techbridge.org

CEDC.org
cedc.org
Ocala, FL
Laryn Kragt Bakker, 202-635-7987 or web@cedc.org

Top Donor Management Systems
Rasier’s Edge
Salesforce.com
Nonprofit Starter Pack
DonorPerfect

TechBridge is a nonprofit that drives community impact by bringing affordable business & technology expertise to other nonprofits.

TechBridge provides subsidized consulting services to design and implement a custom-developed Salesforce solution. Salesforce is a cloud database to manage your mission critical information. Data is tracked in one place using proven templates in the following areas:

- Donors
- People
- Organizations
- Donors
- Sponsors
- Volunteers
- Events
- Grants
- Programs
- Case Management
- Campaigns
- Client Intake
- Emergency Assistance
- Custom Data Management

To learn more, visit us at: www.techbridge.org
Or email us at: info@techbridge.org

Technology Solutions for Social Change and Organizational Growth
- Technology strategy, assessment and planning
- Contact, donor, program and services data systems on the web
- Data migration and integration
- Drupal, Salesforce and .Net web and CRM solutions for effective communications and advocacy
- Client-centered training and support for new and existing systems

We make technology accessible and affordable for nonprofits

Database Designs Associates Inc
Steven Backman, Principal

Technology Solutions for Social Change and Organizational Growth
- Technology strategy, assessment and planning
- Contact, donor, program and services data systems on the web
- Data migration and integration
- Drupal, Salesforce and .Net web and CRM solutions for effective communications and advocacy
- Client-centered training and support for new and existing systems

We make technology accessible and affordable for nonprofits

Database Designs | 101 Tremont St, Suite 614 | Boston, MA 02108
TEL: 617.423-6355 | www.dbdes.com
## MIDWEST & MOUNTAIN

### Cividesk

![Cividesk Logo](image)

**www.cividesk.com**  
*Denver, CO*

Cividesk web-based, hosted solutions are built from open source & cost-efficient offerings, tailored to your unique needs, fully maintained and priced to be affordable even for the smaller nonprofits.  
Virginie Ganivet, 866-670-7165 or virginie@cividesk.com  

<table>
<thead>
<tr>
<th>Top Donor Management Systems</th>
</tr>
</thead>
<tbody>
<tr>
<td>CiviCRM</td>
</tr>
</tbody>
</table>

### Emphanos LLC

![Emphanos LLC Logo](image)

**emphanos.com**  
*Chicago, IL*

Full service professional CiviCRM and Drupal solutions provider: Data migrations, implementation and customizations, data dashboards, mobile apps, data migrations out of Raiser’s Edge and Salesforce.  
Young-Jin Kim, 312-970-1276 or info@emphanos.com  

<table>
<thead>
<tr>
<th>Top Donor Management Systems</th>
</tr>
</thead>
<tbody>
<tr>
<td>CiviCRM</td>
</tr>
<tr>
<td>Drupal</td>
</tr>
<tr>
<td>Red Hen CRM</td>
</tr>
</tbody>
</table>

### m3 Development

![m3 Development Logo](image)

**www.m3development.net**  
*Denver, CO*

m3 Development is a full service consulting firm offering tailored solutions and counsel serving NPOs fundraising; campaign; board development; capacity building; search; & strategic planning needs.  
Michael Baker, CFRE, 732-245-9868 or mbaker@m3development.net  

<table>
<thead>
<tr>
<th>Top Donor Management Systems</th>
</tr>
</thead>
<tbody>
<tr>
<td>DonorPro</td>
</tr>
<tr>
<td>DonorPerfect</td>
</tr>
<tr>
<td>GiftWorks</td>
</tr>
</tbody>
</table>

### MAP for Nonprofits

![MAP for Nonprofits Logo](image)

**www.mapfornonprofits.org**  
*St. Paul, MN*

Still not sure what to choose? We’ll start with a thorough needs assessment, then guide you through software demos and due diligence, and help you made a decision—confidently.  
Karen Graham, 651-393-2178 or info@mapfornonprofits.org  

<table>
<thead>
<tr>
<th>Top Donor Management Systems</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impartial software selection and implementation</td>
</tr>
</tbody>
</table>

### OutreachU

![OutreachU Logo](image)

**www.Outreach-U.com**  
*Youngstown, OH*

OutreachU™ is a series of principles that bring focus to your Outreach/Development activities resulting in increased customer loyalty and increased accountability.  
John Chamberlin, 412-992-6852 or john.chamberlin@rockpaperscissorschute.com  

<table>
<thead>
<tr>
<th>Top Donor Management Systems</th>
</tr>
</thead>
<tbody>
<tr>
<td>DonorPro</td>
</tr>
</tbody>
</table>

### The Connected Cause

![The Connected Cause Logo](image)

**theconnectedcause.com/dmsguide/**  
*Chicago, IL*

The Connected Cause is a place for nonprofit experts to share perspective, guidance and best practices for using today’s technology effectively, and provide thought leadership for all nonprofits.  
Jeffrey Appell, 510-969-2761 or info@theConnectedCause.com  

<table>
<thead>
<tr>
<th>Top Donor Management Systems</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impartial software selection and implementation</td>
</tr>
</tbody>
</table>
Choosing a new donor management system can feel overwhelming. Connect to our expert advice to make your donor database project successful.

We will work one-on-one with your organization to:

- Determine your requirements
- Decide what to track
- Prioritize your needs
- Select the best donor management system for your organization.

It costs nothing to discuss your needs and our services. Contact us today!

651-393-2178 or info@mapfornonprofits.org
### PACIFIC NORTHWEST

**Sidekick Solutions**

- **Website**: [www.sidekicksolutionsllc.com](http://www.sidekicksolutionsllc.com)
- **Location**: Spokane, WA
- **Services**: We believe nonprofits are real-life heroes. We setup, implement, and support software for building donor relationships, managing fundraising performance, and demonstrating program outcomes and impact.
- **Contact**: Jeffrey Haguewood, 509-474-9596 or info@sidekicksolutionsllc.com

**Swift River Consulting**

- **Website**: [www.swiftriverconsulting.com/](http://www.swiftriverconsulting.com/)
- **Location**: Seattle, WA
- **Services**: Swift River Consulting is a Certified B Corporation™ focusing on small to medium-sized nonprofits, helping to maximize use of the Salesforce platform with our deep expertise in nonprofit processes.
- **Contact**: Meghan Morrison, 415-547-0630 or info@swiftriverconsulting.com

**galgeek**

- **Website**: [www.galgeek.com](http://www.galgeek.com)
- **Location**: Portland, OR
- **Services**: Barbara Miller, 503-616-5427 or galgeek@galgeek.com

**Technology Interpreter for Arts Groups**

- **Website**: [carolinerenard.com](http://carolinerenard.com)
- **Location**: Kirkland, WA & Seattle, WA
- **Services**: Caroline Renard, 425-998-6213 or cr@carolinerenard.com

### CALIFORNIA

**Baron Management Group**

- **Website**: baronmanagementgroup.com
- **Location**: Laguna Niguel & Orange County, CA
- **Services**: We provide an independent software evaluation, analysis of your resources, implementation of a system, and help you update and document your work processes to achieve maximum efficiencies.
- **Contact**: Jasna Baron, 949-230-2176 or jbaron@baronmanagementgroup.com

**Chapman Cubine Adams + Hussey**

- **Website**: ccah.com
- **Location**: San Francisco, CA
- **Services**: We’re driven by the question, What’s Next? What’s next in multi-channel marketing? We embrace new ideas, innovative solutions and creative tactics that help our clients break through the clutter.
- **Contact**: Kim Cubine, 703-248-0025 or info@ccah.com

**Exponent Partners**

- **Website**: [www.exponentpartners.com](http://www.exponentpartners.com)
- **Location**: San Francisco, CA
- **Services**: Exponent Partners is a Salesforce consulting firm that works exclusively with nonprofits to deliver solutions for managing donors, fundraising, client cases, student data, and organizational outcomes.
- **Contact**: Adam Park, 800-918-2917 or info@exponentpartners.com
<table>
<thead>
<tr>
<th>Top Donor Management Systems</th>
<th>CALIFORNIA</th>
</tr>
</thead>
<tbody>
<tr>
<td>FivePaths LLC</td>
<td><a href="http://www.fivepaths.com">www.fivepaths.com</a></td>
</tr>
<tr>
<td>FivePaths</td>
<td>FivePaths helps nonprofits choose and develop robust, attractive and sustainable data and web systems. FivePaths offers unique depth of knowledge in donor and web solutions best fit for nonprofits. Eric Leland, 415-326-3483 or <a href="mailto:eric@fivepaths.com">eric@fivepaths.com</a></td>
</tr>
<tr>
<td>Robert L. Weiner Consulting</td>
<td><a href="http://www.rlweiner.com">www.rlweiner.com</a></td>
</tr>
<tr>
<td>Robert Weiner</td>
<td>Robert L. Weiner Consulting helps fundraisers make informed, strategic decisions about tools like CRM systems, donor databases, and association management software, and business processes, staffing, and technology planning. Robert Weiner, 415-643-8955 or <a href="mailto:robert@rlweiner.com">robert@rlweiner.com</a></td>
</tr>
<tr>
<td>SuiteImpact</td>
<td><a href="http://www.suiteimpact.com">www.suiteimpact.com</a></td>
</tr>
<tr>
<td>SuiteImpact</td>
<td>SuiteImpact provides NetSuite implementation, training, customization and support services for social enterprises including Nonprofits, B Corps and L3Cs. Jeff Hancock, 619-838-4277 or <a href="mailto:jeff@suiteimpact.com">jeff@suiteimpact.com</a></td>
</tr>
</tbody>
</table>

**SUSTAINABLE TECHNOLOGY FOR YOUR CAUSE**

- [x] Strategy
- [x] Websites
- [x] Databases
- [x] Integrations
- [x] Support
- [x] Trainings

FivePaths

Your Trusted Technology Partners for Over 10 Years

www.fivepaths.com | 415-326-3483
<table>
<thead>
<tr>
<th>California</th>
<th>Top Donor Management Systems</th>
</tr>
</thead>
</table>
| Swift River Consulting | www.swiftriverconsulting.com/  
San Francisco, CA  
Swift River Consulting is a Certified B Corporation™ focusing on small to medium-sized nonprofits, helping to maximize use of the salesforce platform with our deep expertise in non-profit processes.  
Meghan Morrison, 415-547-0630 or info@swiftriverconsulting.com | Salesforce.com |
| The Connected Cause | theconnectedcause.com/dmsguide/  
Oakland, CA  
The Connected Cause is a place for nonprofit experts to share perspective, guidance and best practices for using today’s technology effectively, and provide thought leadership for all nonprofits.  
Jeffrey Appell, 510-969-2761 or info@theConnectedCause.com | Impartial software selection and implementation |
| Consult Jenny, Inc | consultjenny.com  
San Francisco, CA  
Jennifer Waggoner, 415-644-5094 or jwaggoner@consultjenny.com | Impartial software selection and implementation |

<table>
<thead>
<tr>
<th>Outside The U.S.</th>
<th>Top Donor Management Systems</th>
</tr>
</thead>
</table>
| Cividesk | www.cividesk.com  
Paris, France  
Cividesk web-based, hosted solutions are built from open source & cost-efficient offerings, tailored to your unique needs, fully maintained and priced to be affordable even for the smaller nonprofits.  
Valerie Davo, +33 9 75 18 48 76 or valerie@cividesk.com | CiviCRM |
| Freeform Solutions | www.freeform.ca  
Toronto, ONT, Ottawa, ONT & Victoria, BC  
We are a global Canada-based nonprofit helping other nonprofits of all sizes use technology - clients include Oxfam & Amnesty. We understand nonprofit needs because we are nonprofit ourselves.  
Jason Cote, 647-723-5415 or info@freeform.ca | CiviCRM  
Drupal  
Formulize  
Impartial software selection and implementation |