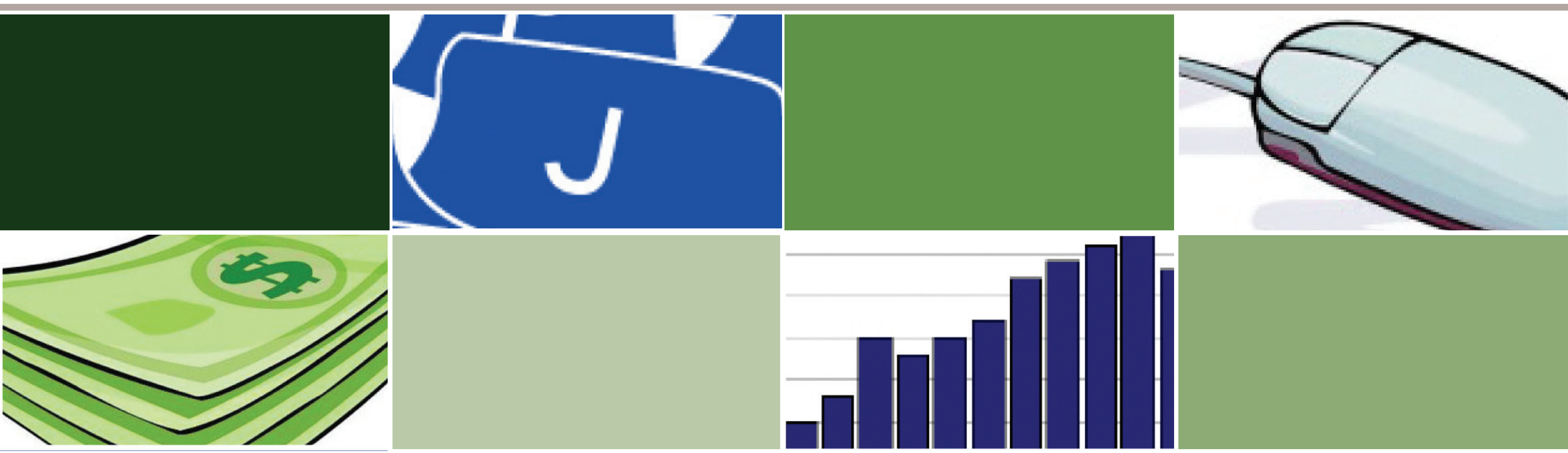
A CONSUMERS GUIDE TO LOW COST DONOR MANAGEMENT SYSTEMS



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CONSIDERING DONOR MANAGEMENT SYSTEMS

INTRODUCTION

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. In this report, we take a look specifically at 29 lower-cost systems, which we've defined as under $4,000 to support one user and less than 500 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 $4,000 cutoff. Some are very full-featured. Others are stripped down and simple.

This report is targeted at small-to-medium-sized nonprofits for whom 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 $4,000.

The first step in choosing a software tool, of course, is to understand 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 you might want 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 Low Cost Donor Management Systems.

Finally, we take a more detailed look at 10 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.

WHAT HAS CHANGED

The donor management landscape has changed since 2009, 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 systems that are new or that gained prominence since our last review, including:

- Click & Pledge, by Click & Pledge
- DonorSnap.com, by DonorSnap
- Donor Tools, by The Small Idea Company
- Little Green Light, by The Bicknell Information Group
- NetSuite Do Good Better, by NetSuite.org.
- Nonprofit Manager, by Trailblazer
- PatronManager, by Patron Technology
- Sumac, by Sumac

To keep the total number of systems reviewed close to a manageable 30, we adjusted our price threshold from the $4,250 for one user and 500 donors used in the 2009 report to $4,000. Also, to ensure that we were fair to systems whose focus lies beyond donor management, we excluded systems 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 towards those needs. In practice, this means we dropped some systems included in the last version of this report, including:

The donor management landscape has changed since 2009, and we've updated the report to reflect those changes.

- Donarius, by Nuverb Systems Inc, as its client base is more than 50 percent churches.
- Donation Director, by Cascade Data Solutions, as its client base is more than 50 percent membership organizations.
- FUNDimensions Fundraising Software, by FUNDdimensions, as it has fewer than 100 clients in North America.
- Membership and Fundraising, by Linked Software, as its client base is more than 50 percent membership organizations.
- Orange Leap, as they don't have any single product which is both under $4,000 and has more than 100 clients in North America.

Two additional systems included in our last report are, as far as we can tell, no longer supported by any organizations—Metrix, by Fund for the City of New York, and Mission Assist, by Donor Strategies—and do not appear in this version. Finally, one vendor, Straight Forward Software, Inc., chose not to participate in our research, so its LifeLine Nonprofit Management System is not included.

WHAT TYPES OF SYSTEMS ARE AVAILABLE?

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 they should only get one mailing, and it's suddenly completely unmanageable.

If you're receiving more than a handful of donations, you'll quickly run into problems with an Excel spreadsheet.

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 it will put within reach, you may well be able to bring in a bit more money to cover the cost.

Tracking Donors Vs. All Constituents

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 is very useful—it's ideal to be able to look at one place to see everything that John Smith has done with your organization. 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.

Hosted Vs. Installed Systems

A growing number of donor management systems are hosted entirely online, and accessible via a Web browser. In this model, sometimes called Software-as-a-Service (SaaS), or using an application "in the cloud," you pay a software vendor to provide online access to the software. The software, and all your data, is stored on the vendor's servers. You don't have to purchase any hardware, the vendor handles software updates and data backups, and your staff can access the system from anywhere there's an Internet connection.

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 (sometimes 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 using 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 that are 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 weeks or months to build yourself. Look for an extensively customizable system (there's a scenario specifically devoted to that in our **Recommendations** section) and start there. 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.

WHAT DO THESE SYSTEMS DO?

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 gibes 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 given "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 free-form notes to be referred to to later? Can you track the part of a gift that isn't tax deductible because the donor received a "premium," or 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?

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 his or her phone, or gets a new job? Some systems integrate with outside sources of addresses and other demographic information to help keep you donor data as up-to-date as possible. Systems also account for the death of donors in myriad ways, ranging from a simple checkbox marking a donor as "deceased" all the way through wizards guide you through all the areas of the system that might be affected by a donor's death.

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 reached thresholds or changes in the data. For example, a system might allow you to set up action reminders for 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 with built in word processors. Others integrate with Microsoft Word to let you easily mail-merge into predefined Word templates. Some, though, require you to export data into Microsoft Excel and mail-merge from there. If you're using a Mac, make sure the system supports it—some of the online systems work fine with Macs in every way except mail-merging.

Some systems provide seamless letter creation and mailmerging 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 steps 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 e-mail by clicking on contacts. More and more systems, 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 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, which means 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 yourself removed from blacklists when it does.

Some provide useful broadcast email support, though surprisingly few of them offer functionality comparable to specialist tools.

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 generated 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.

Some systems provide a set of tools to create your own reports, with the data, columns and formatting useful to you.

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.

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 range from a minimum of about 2.5 percent all the way up to a whopping 7-8 percent.

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.

Donors are not your organization's only constituents—you likely work with a wide variety of other people as well.

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.

Customization

Most donor management systems are designed to work for a wide variety of organizations. To facilitate this, they let you configure many of the field values throughout the system—for example, you can define the types of relationships your organization has with constituents, and those choices show up in drop-down 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.

Some systems allow unlimited new fields, or even let you customize further to support unique constituent interactions.

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—to, for instance, 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 or installed, the donor data contained within it is yours.

Whether your system is hosted (also called "Software-as-a-Service" or "in the cloud") 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.

If you want to build an automated connection, check to make sure the system supports it. Is an API or ODBC database connection 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 kind of support does it offer for actually communicating with your accounting system?

Many systems (although certainly not all) support the idea of a "batch" of donations—a set of payments for a particular timeframe that's grouped and considered as one for accounting purposes. Sometimes you'll need to enter gifts into a batch, or sometimes you can create the batch afterwards by grouping existing gifts. Once a batch is closed, a few systems let you mark it as "posted" or reconciled to accounting for tracking purposes.

But the systems vary in how they approach making changes to a payment after the batch it's assigned to has been reconciled. Many systems offer no controls to prevent someone from changing a donation after the fact, which could throw your books out of whack. Others offer the opposite extreme—there's no way to make any change to a payment once it's been reconciled. The best approach may fall somewhere in-between—for instance, the ability to un-post and then re-post batches.

A donor management system that speaks directly to your accounting system can be handy, but often isn't necessary.

Having a donor management system that speaks directly to your accounting system can come in handy. A number that we reviewed offer direct feeds to such common accounting systems as QuickBooks. But a system that handles batching well is usually sufficient—as long as you define a straightforward batching strategy, it's not typically difficult to manually export batch information from your system and import it into your accounting system on a regular basis. In fact, some organizations prefer the control that process allows compared to an automated process.

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.

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

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.

Systems should also effectively support power users—often, these users are development staff 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 actually click it. But printed manuals are also useful. If you're going to widely roll out a system, can you tailor the documentation to your own processes?

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

Training varies among vendors, from affordable over-the-phone and online options to more formal on-site training at your office. Do they offer training materials? How much will you pay for each training option?

Installation and Maintenance

What must you do internally to support and maintain the system? Hosted systems are typically easier to support, but check how easy it is to back up data so you have your own copy?

If the system is installed on your own desktops, you'll need to take charge of the installation process and back up your data (though the vendor may help you through the process). A few of these systems have fairly complicated infrastructural needs—make sure you know, for instance, whether you'll need a dedicated server (a computer that literally does nothing but run the donor management system). For any installed system, you'll need to add in any system updates, so it's worth checking how often they're issued and what you'll be expected to do to install them.

Product Background

It takes considerable effort to choose a donor management software package and move your data into it. You don't want to be forced to repeat the process in a year because the vendor went out of business.

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?

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.

RECOMMENDATIONS

Which of the 29 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 $4,000 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 10 systems that, for us, offer the best combination of functionality, price and attractiveness in a variety of situations. We compare those systems on page 24.

Ready to dive in?

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 have one or two users, less than a few thousand donors, and you want to pay as little as possible.

- **Basic Funder Premier,** by Jellyware Corporation
- **DONATION,** by Software4Nonprofits
- **Donor Tools,** by The Small Idea Company
- **Exceed! Basic,** by Telosa Software, Inc.
- **GiftWorks,** by Mission Research
- **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.

- **CiviCRM,** by Social Source Foundation
- **DonorPerfect,** by Softerware
- **DonorSnap.com,** by DonorSnap
- **eTapestry,** by Blackbaud
- **Exceed! Basic,** by Telosa Software
- **GiftWorks,** by Mission Research
- **NetSuite Do Good Better,** by NetSuite.org
- **Nonprofit Manager,** by Trail Blazer
- **Sumac,** Sumac
- **NEON,** by Z2 Systems

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.

- **DonorPerfect Online,** by Softerware, Inc.
- **DonorPro,** by TowerCare Technologies
- **Donor Tools,** by The Small Idea Company
- **eTapestry,** by Blackbaud
- **GiftWorks,** by Mission Research

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,** by Softerware, Inc.
- **DonorPro,** by TowerCare Technologies
- **Exceed! Premier,** by Telosa Software, Inc.
- **GiftWorks,** by Mission Research
- **Patron Manager,** by Patron Technology
- **NEON,** by Z2 Systems, Inc.
- **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
- **NetSuite Do Good Better,** by NetSuite.org
- **Organizer's Database,** by The Organizer's Collective
- **Salesforce Foundation's Nonprofit Starter Pack,** by Salesforce Foundation

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.

- **CiviCRM,** by Social Source Foundation
- **Common Ground,** by Convio
- **DonorPerfect,** by SofterWare, Inc.
- **DonorPro,** by TowerCare Technologies
- **Salesforce Foundation's Nonprofit Starter Pack,** by 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
- **Common Ground,** by Convio
- **DonorPerfect,** SofterWare, Inc.
- **DonorPro,** by TowerCare Technologies
- **Salsa,** by Salsa Labs
- **NEON,** by Z2 Systems, Inc.

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.

- **CiviCRM,** by Social Source Foundation
- **Common Ground,** by Convio
- **DonorPerfect,** by SofterWare, Inc.
- **DonorSnap.com,** by DonorSnap
- **eTapestry,** by Blackbaud
- **NetSuite 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.

- **Common Ground,** by Convio
- **eTapestry,** by Blackbaud
- **NetSuite Do Good Better,** by NetSuite.org
- **NEON,** by Z2 Systems

Other good values

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

- **The Databank,** by thedatabank (particularly for advocacy groups)
- **DenariOnline,** by Synergy Development Systems, Inc (particularly for missionary and child sponsorship programs)
- **Organizers Database (ODB),** by the Organizers' Collaborative (particularly for grassroots organizing groups)
- **Sage Fundraising 50,** by Sage (particularly for those with sophisticated but somewhat-tech-averse fundraising staff)

THE TOP 10

We took a much more detailed look at 10 of these systems that, for us, offer the best combination of functionality, price and attractiveness in a variety of situations. In selecting the 10, we prioritized functionality to manage complex gift and donor information, issue printed acknowledgement letters, usability, querying and reporting, configurability, managing constituent data beyond donations, and price.

We evaluated 10 systems based on a list of 147 criteria. The matrix on the next page summarizes our findings.

These aren't likely to be precisely the best 10 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 10 of these systems, see the Reviews of Low Cost Donor Management Systems, starting on page 28.

Since the first version of this report, the top 10 has seen a few changes. Of the new systems included in this update, two made it into to the top 10: Nonprofit Manager, by Trailblazer, and NetSuite Do Good Better, by NetSuite.org. In addition, CiviCRM, by Social Solutions Foundation is also new to our top 10, but not to our report. Sage Fundraising 50 was bumped from the list, and Orange Leap MPX, which made the top 10 in our last report, didn't meet our selection criteria this time around and thus was not reviewed.

Near-Misses

While not among our top 10, these systems are strong contenders worthy of serious consideration.

- **DonorSnap.com,** by DonorSnap
- **PatronManager,** by Patron Technology
- **Sage Fundraising 50,** by Sage
- **Salesforce Foundation's Nonprofit Starter Pack,** by Salesforce Foundation
- **Sumac,** by Sumac

CHART OF RECOMMENDATIONS

	CiviCRM	Common Ground CRM (Basic)*	Common Ground CRM (Full)*	Donor Perfect Installed (Basic)*	Donor Perfect Installed (Full)*	Donor Perfect Online (Basic)*	Donor Perfect Online (Full)*	DonorPro	eTapestry (Basic)*	eTapestry (Full)*	GiftWorks (Basic)*	GiftWorks (Full)*	NetSuite Do Good Better	Neon	Nonprofit Manager by Trailblazer	Total Info
Adding and Tracking Donations	Good	Excellent	Excellent	Good	Excellent	Excellent	Excellent	Good	Good	Excellent	Excellent	Excellent	Good	Excellent	Fair	Good
Managing Donor Information	Good	Good	Good	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Good	Excellent	Good	Good	Good	Good
Prospecting and Proposals	Good	Excellent	Excellent	Good	Excellent	Good	Excellent	Good	Good	Good	Fair	Fair	Good	Excellent	Fair	Excellent
Permissions	Good	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Good	Excellent	Excellent	None	Good	Good	Good	Good	Good
Mail-Merging Letters	Good	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Fair	Fair	Good	Good	Excellent	Excellent	Good	Excellent
Emailing	Good	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Good	Excellent	Good	Good	Excellent	Good	Good	Good
Querying	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Good
Reporting	Excellent	Excellent	Excellent	Excellent	Excellent	Good	Good	Good	Good	Good	Excellent	Excellent	Excellent	Good	Good	Excellent
Payment and Website Integration	Excellent	None	Excellent	None	Excellent	None	Excellent	Excellent	Fair	Excellent	None	Good	Good	Excellent	Good	Fair
Tracking Events	Good	Good	Good	Excellent	Excellent	Excellent	Excellent	Excellent	Fair	Good	Fair	Excellent	Fair	Good	Good	Good
Tracking Other Built-In Interactions	Good	Good	Good	Excellent	Excellent	Excellent	Excellent	Excellent	Fair	Fair	Fair	Good	Fair	Excellent	Excellent	Excellent
Customization	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Good	Excellent	Excellent	Fair	Good	Excellent	Good	Fair	Good
Integration	Excellent	Excellent	Excellent	None	Excellent	Excellent	Excellent	Good	Fair	Excellent	Fair	Fair	Excellent	Good	Fair	Good
Accounting Support	Fair	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Fair	Fair	Good	Good	Good	Good	Good	Excellent
Ease of Use	Good	Good	Good	Excellent	Excellent	Excellent	Excellent	Excellent	Good	Good	Excellent	Excellent	Good	Good	Good	Fair
Extent of Support and Training	Good	Excellent	Excellent	Good	Good	Excellent	Excellent	Excellent	Good	Good	Good	Good	Good	Good	Excellent	Good
Ease of Installation and Maintenance	Fair	Excellent	Excellent	Good	Good	Excellent	Excellent	Excellent	Excellent	Excellent	Good	Good	Excellent	Excellent	Excellent	Fair
Product Background	Excellent	Good	Good	Excellent	Excellent	Excellent	Excellent	Good	Excellent	Excellent	Excellent	Excellent	Good	Excellent	Good	Good

• None   Fair   Good   Excellent

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

Pricing Comparison

This matrix summarizes approximate list cost for each of our top 10 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.

	One User, 900 Donors		Three Users, 20,000 Donors	
	First Year	Yearly Ongoing + Email Support	First Year	Yearly Ongoing + Email Support
CiviCRM	$0	$600[1]	$0	$600[1]
Common Ground (Basic)*	$2,400	$2,400	$3,600	$3,600
Common Ground (Full)*	$3,900	$3,900	$5,100	$5,100
DonorPerfect Installed (Basic)*	$2,555	$510	$6,215	$610
DonorPerfect Installed (Full)*	$4,340	$510	$8,050	$610
DonorPerfect Online (Basic)*	$576	$576	- [2]	- [2]
DonorPerfect Online (Full)*	$3,971	$2,976	$5,387	$4,392
DonorPro	$3,714	$2,214	$4,860	$3,360
eTapestry (Basic)	$456	$456	$2,952	$2,952
eTapestry (Full)	$3,023	$775	$7,266	$5,018
GiftWorks (Basic)*	$499	$0	$1,497	$0
GiftWorks (Full)*	$1,247	$0	$3741	$0
NetSuite Do Good Better	$0 [3]	$0 [3]	$0 [3]	$0 [3]
Neon	$1,235	$600	$2,933	$2,388
Nonprofit Manager by TrailBlazer	$1,188	$1,188	$4,299 [4]	$4,299 [4]
Total Info	$1,380	$360	$3,080	$360

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

[1] Support is available from third-party providers, for a cost estimated at $50 to $2,000 per year.

[2] Vendor does not recommend the lowest price version for clients with over 15,000 records.

[3] NetSuite provides Do Good Better as a free donation, including support, to qualified nonprofits with self-installation and setup.

[4] Pricing for TrailBlazer is based on the amount the organization receives in contributions, gifts and grants, rather than number of users. This price assumes that the organizaiton recieves $800,000 to $1,200,000 in contributions

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, factor in 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.

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.

A few hundred dollars shouldn't dictate your fundraising future.

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 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 demoed—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 LOW COST 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 10 of these systems, there's even more detail—see **Reviews of the Donor Management Systems** for a six-page review of each.

BasicFunder Premier, by Jellyware Corporation (2011)

Installed on PC desktops

At $349 for as many users as you like, with support included, 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, thanks to integration with Austin Payment Exchange for credit card transactions. 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 (although it won't let you include custom fields), and a list-builder to create queries and define what fields you want to see for them. It's weak in address-handling and relationships, however—you can store only a single address unless you use custom fields, and there's no support for relationship tracking (for example, "John works with Jill," or "knows Barbara on the board") other than through notes. Householding must be done manually, by either tracking a spouse only in a notes field, for instance, or otherwise marking one of the spouses as "do not mail." All in all, it provides a limited but useful set of features at a reasonable price. Small updates have been made to this system since our 2009 report.

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 and Joomla, and with online payment and form building functionality but no ability to batch donations for integration with accounting. You'll need someone familiar with installing and configuring open source systems on a web server in order to get you up and running. 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 2009 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 who need a donor management solution coupled with the ability to sell products or solicit and process donations online. 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. Much of the rest of the implementation, however, is standard Salesforce Non Profit Starter Pack, with all of that platform's strengths and weaknesses. Click & Pledge is available for free to qualifying nonprofit organizations. The company draws revenue through fees from payment transactions. Click & Pledge has several fee plans, ranging from $60 per year plus 4.5% and $0.35 per transaction to $300 per year plus 2.85% and $0.27 per transaction. A no monthly fee plan is also offered that charges somewhat higher fees per transaction.

Common Ground CRM, by Convio

Online hosted system

Convio's Common Ground, a product built on the Force.com platform, (as in Salesforce.com) will be of interest to many nonprofits. It essentially transforms Salesforce.com into a full-featured donor management system while keeping the flexibility for which Salesforce is known. Common Ground has strong support for gift entry and tracking, integrated receipting, mail merging, emailing, householding, and a substantial number of useful standard reports. Support for payment processing and event registration are available through the Online Fundraising module at additional cost. Since our last report, the system has gained the ability to track events and volunteers, and has added a mobile app that lets you access donor records and reports from certain smartphones. Still missing is built in functionality to track membership payments and levels. Common Ground is, however, very customizable and there are many opportunities for your technical staff or consultant to extend the system. You can also take advantage of the many add-ons built for Salesforce.com via the AppExchange (most at additional cost). The interface is reasonably laid out but novice users will likely require training. There have been significant updates to this system since our 2009 report. See **Reviews of the Donor Management Systems** for an in-depth review of this system.

Community Enterprise, by CitySoft, Inc.

Online hosted system

CitySoft is a highly integrated package with support for a number of different 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, nor is there an automatic way to mark a batch of thank you letters as sent. There are several pre-built donor reports and a fairly advanced query tool allows you to find a list of donors, email them, mail-merge letters, or export data to Excel. While the system has the ability to import gifts in bulk from a spreadsheet, there is no facilitation for manual quick entry of large numbers of gifts. CitySoft has strong event- and member-management functionality, and could be a good fit for those with lighter donations 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 costs $250 to $500 a month. Substantial updates have been made to this system since our 2009 report. 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 they then customize with the appropriate fields and reports to meet each clients' needs. The user interface is clunky at times—for instance, everything is displayed as text with links rather than using buttons for actions, and you need to navigate through a number of complex screens and options to create a query. 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. They offer both prepackaged reports, and customizable "roster" reports—all reports are displayed in a matrix format, so they have a basic look but good information. The strong internal broadcast emailer will be attractive to many organizations. The system, with the Fundraising module included, starts at $2,475 per year. 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 2009 report.

DenariOnline, by Synergy Development Systems, Inc.

Online hosted system

This is a strong system that will be of particular interest to Christian ministries and organizations—but it's hampered by some usability issues. It'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. Donor information is spread out across a number of tabs with an unusual navigation system, which makes it a bit difficult to get a full view of all activities. There's a built-in email and text editor, with templates and mail-merging. Their querying tool is powerful, but not trivial to use — it can be difficult to find the right system fields, and to arrange them into the query you want. Standard reports are strong once you get the query right—with a number of both summary reports and more detailed views. There's no ability to create ad-hoc custom reports, however, other than by exporting data out of the system. Beyond just donor management, they offer unusual modules to support ministries, such as features to support missionary work, child sponsorship, and radio "-athon" events. The system price varies both by number of system user and by number of records—for instance, it would be $840 annually for one user less than 1,000 users, or $1,860 for three users and 5,000 donors. Phone support is included. Small updates have been made to this system since our 2009 report. Many of these changes were outside the scope of our review criteria.

DONATION, by Software4Nonprofits

Installed on PC desktops

This basic, entry-level installed system is an interesting option for organizations seeking to step up from a spreadsheet but who don't need a full featured donor management system. While unsuitable for tracking and managing the full fundraising process, DONATION's strengths, as its name suggests, lie in tracking basic information around donors and gifts. It supplements this with some basic mail-merge and reporting functionality, including support for more complicated Canadian receipts out of the box. An enhanced report browser has been added since the first edition of this report and it does a great job of presenting the 30 or so canned reports in a logical manner. Searching and querying capabilities are limited and there is no support for householding, relationships or accounting. Customization is limited to three, user definable "other" fields, plus two "category" drop down fields. The system is targeted at small organizations, and nonprofits with more than a few thousand donors will quickly outgrow it. A single user license is $80 (optional $40 annual support thereafter) and a multiuser network license for up to five users is $150 (optional $75 annual support thereafter). Small updates have been made to this system since our 2009 report. Many of these changes were outside the scope of our review criteria.

DonorPerfect, Installed and Online, by SofterWare, Inc.

Installed on PC desktops or Online hosted system

SofterWare offers two similar but distinct systems: DonorPerfect Installed (DPI), and DonorPerfect Online (DPO). There are small functional differences between them, but for the most part they are very similar. They are both interesting systems, with as strong functionality as any system we reviewed in gift and donor tracking, prospecting and support for accounting needs, and they are laid out to be among the easiest of the systems to use. The systems are 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. They provide useful mail merge functionality, querying and reporting, and a strong integration with Constant Contact in the online version. However, email functionality is not very strong in the installed version—you can't, for instance, mail merge fields into emails. An optional module (WebLink) also adds strong online payment and custom form functionality. Both support volunteers and members and include some events functionality. There have been significant updates to this system since our 2009 report. See **Reviews of the Donor Management Systems** for an in-depth review of this system.

DonorPro, by TowerCare Technologies

Online hosted system

DonorPro has solid 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 visual design is not beautiful, but it's quite usable, with a particularly friendly tool for generating queries and a number of functionalities that speed up repetitive tasks like data entry. Through an integration with Constant Contact, email capability has been greatly enhanced since our last report; the ability to track and to get detailed reports on broadcast email is now included. The system has powerful quick search capability, including phonetic searching to compensate for spelling errors, but you cannot search for data in custom fields. An optional module provides support for events. 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 2009 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. It is easy to search for donors and once found their information is displayed in a comprehensive and cleanly displayed donor profile. DonorSnap lets you easily create custom fields which can be placed virtually anywhere in the system. Querying is strong, if sometimes complicated, and the system includes an array of useful donor reports that can be filtered easily. Reports that are modified, however cannot be saved, which could lead to duplication of effort. DonorSnap allows you to import gifts from an Excel spreadsheet, but lacks support for manual quick entry of gifts in bulk. Also challenging is the system's inability to process credit card payments, and lack of support for online giving. DonorSnap is $450 per year for one user and 900 donor records. An organization with three users and 20,000 donor records would pay $1,125. These prices include unlimited users, setup, training and email support.

Donor Tools, by The Small Idea Company

Online hosted system

Donor Tools, a hosted solution by The Small Idea Company 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 thank you letters for pledges and gifts is also a straight forward affair. 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. At the time of this review, Donor Tools did not have broadcast email capability. The system does not allow custom fields, and in lieu of traditional reports, users must rely on on-screen query results to get the information they need. This might disappoint users who wish for more layout and display flexibility. Donor Tools is offered at three pricing levels: $60, $360 and $720 per year, with support for pledges starting at the $300 per year level. All levels offer unlimited users and donor records.

eTapestry, by Blackbaud

Online hosted system

eTapestry provides useful and affordable functionality for small organizations, along with the ability to grow as an organization's needs evolve (although at considerable additional cost). The base product provides strong gift- and donor-tracking functionality, and querying, as well as reasonable email, mail-merged letter and reporting functionality. 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 (for instance, a date, a category and a rating for the same interaction). Many system functionalities require an additional charge, however—for instance, importing data, advanced emailing capability, online payments and Web integration all require additional fees. There are a lot of features and options in the system, and some terminology may not be intuitive to all users, making it more complex to use than many we reviewed. The price varies greatly depending on the number of people using the system, the features you add, and the number of donors you store. A mobile app that allows eTapestry data and reports to be accessed from certain smartphones. Small updates have been made to this system since our 2009 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 Vertical Response to Exceed! Basic, a welcome enhancement for organizations who 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 each additional user, with a number of support packages starting at $200 (or keep an eye out for discount offers from TechSoup). This system has changed substantially since our 2009 report. Many of these changes were outside the scope of our review criteria.

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 to 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 while 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. Some screens are crowded and busy, but the general layout makes sense. The events module track RSVP status, table assignments, and name tags, and is included in the core price. The system is $3,095 for a single user (or $2,095, if you only need to track up to 2,500 records), $500 for each additional users, with an annual support cost of 20 percent of the license cost. 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. This system has changed substantially since our 2009 report. Many of these changes were outside the scope of our review criteria.

FundRaiser Select, by FundRaiser Software

Installed on PC desktops

Fundraiser Select has solid donation management features, though support for pledges 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, and then either email them or print mail merged letters using a built in word processor. However, throughout the system, interactions are displayed primarily through short codes/acronyms rather than more descriptive names, which could lead to difficulties keeping track of them all as the list grows. FundRaiser Select is $1,200 to license for a single user, or $1,700 for a multi-user version. Support is extra. This system has changed substantially since our 2009 report. Many of these changes were outside the scope of our review criteria.

GiftWorks, by Mission Research

Installed onto PC desktops or online hosted system

GiftWorks is a very friendly, polished system that offers impressive functionality for its low price. It provides useful gift tracking and donor management functionality, with a nice "dashboard" of all your interactions with a donor. Mail-merging, querying, reporting and accounting controls are also solid. While the base product is limited in its support for online interactions, 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, and add-on modules provide useful functionality for events and volunteer tracking. 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. Phonetic search capability and ability to enter large numbers of gifts through a quick entry interface are among the enhancements to the system since our last report. See **Reviews of the Donor Management Systems,** for an in-depth review of this system. This system has changed substantially since our 2009 report.

Income Manager, by Income Manager Inc.

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

True to its name, Income Manager provides support for a number of different kinds of income, including donations, events and corporate sponsorships. There's a strong and useful setup for campaign tracking that summarizes the amount raised, number of people, number of gifts and more for each campaign code, and lets you track costs against it. The system also has the flexibility to let you compare the success of various campaigns. The features to create queries, emails, and letters are not very easy to use, however. You need to open a separate (included) application to create receipts and thank you letters. For other letters, you need to export data out of the system (for instance, to Excel) in order to merge it with a word processor like Word. Bulk emailing requires you to create and save your query, write and save your email text, and then open IM Email Blast, a separate (included) application, to actually email. Querying itself requires substantial knowledge of how databases work. There are a number of pre-packaged reports, or you can connect to the Access database underlying the application and build your own reports. The system is $1,595 for as many users and donors as desired. Support is an additional $575 per year, and a recommended two days of training is $1,400. They also offer a hosted version (provided via Citrix) at $75 per month. Small changes have been made since our 2009 report.

Little Green Light, by The Bicknell Information Group

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. Simple workflows for the entry and retrieval of donor information 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. Organizations with such users will also appreciate Little Green Light's strong search capabilities. Some advanced users, however, might find themselves frustrated by the program's lack of built in reports and inability to send broadcast email. Inability to support credit card processing will also be a hurdle for organizations who accept donations via credit card. Little Green Light is priced on a sliding scale tied to organizational budget. A small organization with a sub $100,000 budget can acquire a license for about $240 per year. An organization with a $1 million budget would pay about $960 per year.

MatchMaker FundRaising Software Standard Edition (+ Enterprise Edition), by Heritage Designs, LLC

Installed on PC desktops

The company is run by former nonprofit development staff, and that experience shows in their application. While screens are simple and clean in the Standard version, better interface design might improve usability. Both Standard and Enterprise make it easy to do things like manage multiple addresses, view donor pledges before entering gifts, and enter multiple gift amounts or recurring gifts. There's no ability to add multiple gifts in via a bulk entry screen or automatic payment processing for donations or events, but the system handles receipting well. In addition to a much-enhanced interface design, the Enterprise Edition adds features like split gifts and strong functionality around automated email blasts. Some users may struggle with a few interface issues, like required fields not marked as such and some non-intuitive technical terms, 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. The Standard Edition is $1,990 for a single user, $2,795 for two users, or $4,245 for unlimited users, while the Enterprise Edition is $2,790 for a single user, $3,795 for two users, or $5,495 for multiple users. Annual support for both versions is $700, $1,200, or $1,500 for one, two, or three-plus users, respectively. Small updates have been made to this system since our 2009 report. Many of these changes were outside the scope of our review criteria.

NetSuite Do Good Better Fundraising, by NetSuite.org

Online hosted system

NetSuite's Do Good Better, offered as a free grant to qualifying nonprofits, offers sophisticated fundraising functionality with an integrated accounting systems—geared at those with more advanced system needs. It's organized around a well-designed and customizable dashboard that features key performance indicators and other useful information. You'll generally find NetSuite Do Good Better has all the basic functionality you need for donor management, though some areas could benefit from more automation. For example, matching gifts are easily configured but you are not alerted to matching possibilities when entering a new donation. 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.

Neon, by Z2 Systems

Online hosted system

Neon is a strong integrated online system with solid support for donor management. It has support for pledges, soft credits and batches for accounting purposes, as well as 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 bbc line. Gift data can be easily imported into the system. While there is built-in functionality to track and report on grants separately from other gifts, you must use custom fields to track foundation interest. The system also allows broswer-based access via smartphones. The support for mail-merged letters and broadcast email is useful, and it 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 2009 report. See **Reviews of the Donor Management Systems,** for an in-depth review of this system.

Nonprofit Manager, by Trailblazer

Installed onto PC desktops

Trailblazer'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 generally strong. Also useful are the system's ability to let you track event registrants and details around volunteers. However, the gift tracking areas of Nonprofit Manager are not as strong as some other systems reviewed. For example, the system doesn't support seasonal addresses or grant proposal tracking without custom fields. We review this system for the first time in this report. See **Reviews of the Donor Management Systems** for an in-depth review of this system.

PatronManager, by Patron Technology

Online hosted service

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 allows both online and box office sales. Patron Technology also adds to base Salesforce the proprietary PatronMail tool for broadcast emailing. PatronManager shares Salesforce's weaknesses in the area of donor management (see our review of Salesforce, Non-profit Starter Pack), many of which can be remedied by add-ons from the AppExchange. 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.

Results Plus, by Metafile Information Systems

Installed on PC desktops or Online hosted system (via a browser plug-in)

Results Plus, 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 Results Plus allows you to tally gifts either by individual or household, and helps you avoid sending duplicate letters to the same address. 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. To build queries, users must navigate a complex query language and know or look up unintuitive table and field names. Once created, though, 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. The pricing tiers are complicated, based on both the number of users and the number of records. It starts at $1,000 for a single user and up to 1,000 records. It's $4,000 for two or three users, plus $500 per additional user. To manage more than 3,500 records requires a $3,000 upgrade. Support is available at an additional charge. Small updates have been made to this system since our 2009 report. Many of these changes were outside the scope of our review criteria.

Sage Fundraising 50, by Sage

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

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 one on the strongest systems we reviewed in gift and donor tracking function, 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. Sage Fundraising 50 handles broadcast email through the client's email server and provides no delivery reports. Sage Fundraising 50 integrates with Sage Fundraising Online for Internet fundraising The price is determined solely by the number of licenses purchased. One license is $3,400; two licenses are $4,650; and three licenses are $5,900. The yearly maintenance and support fee is 23 percent of the license cost. Small updates have been made to this system since our 2009 report.

Salesforce.com Nonprofit Starter Pack, by Salesforce.com Foundation

Online hosted system

Salesforce is a powerful Constituent Relationship Management system with some basic support for donations out of the box—and it's free to 501(c)(3) organizations for up to 10 licenses. The "nonprofit starter pack", available through the Salesforce Foundation website, 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 integratingwith other systems. The system is very flexible in tracking and displaying all the myriad ways a constituent mightinteract 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. Those who are looking for a low investment system with strong donor management features– our target audience for this report—should consider Convio Common Ground, which is a donor management package built on top of the Salesforce platform. Small updates have been made to this system since our 2009 report.

Salsa, by Salsa Labs

Online hosted system

Salsa is an online fundraising and advocacy platform that includes some basic donor management features. It offers strong email functionality, tight integration of payment and sign up forms with your website, and features like support for distributed house parties and peer-to-peer donation tools that online organizers will find useful. However, there's little support for gift types beyond simple donations, such as stock gifts, in-kind gifts or tribute gifts, and you must know if a gift you're entering should be associated with a pledge—and if so, enter that information separately. It supports relationship tracking and lets you tabulate gifts by household or for each constituent, but isn't strong in creating a mailing list to send only one letter per household. There is no integrated way to generate thank you letters—all letters need to be created by exporting data from the system and merging it externally. If you are primarily interested in advocacy or online fundraising features, and you only need basic donation tracking, Salsa might work for you. Otherwise, you'll want to look elsewhere for donor management functionality. The system has a number of pricing tiers, starting at $1,200 per year (with a one-time $1,000 setup up fee) for the basic system and up to 10,000 donors; it's $4,800 per year with a $2,000 setup fee to support online donations and up to 100,000 donors. The vendor offers discounted pricing for nonprofits with less than $1 million dollars in annual revenue. All packages include support. Substantial updates have been made to this system since our 2009 report, many outside the scope of our selection criteria.

Sumac, by Sumac

Installed on PC desktops

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 straight-forward approach carries through most areas of the system 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, feels cluttered rather than well organized—this could be an issue in particular for organizations that want to track a lot of different types of things about each constituent. Reporting and accounting support are strong, and powerful querying functionality is assisted by a unique visual guide that shows users the number of constituent that will be found by each piece of their complex query before the query is run. The system supports broadcast emailing and includes basic delivery reports, but messages are sent through the client's servers, potentially exposing them to blacklisting. Sumac charges $250 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.

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 it has some of the most integrated and feature-rich mail-merge functionality of any system we reviewed. Relationship management and prospecting features are also particularly strong. Total Info lacks some advanced payment functionality of many systems we reviewed in detail, but stands apart from competitors in its detailed theater-style ticketing and box office functionality—a very unusual feature. 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, and then each person uses the system from their desktop via Remote Desktop Services. The infrastructure supports any kind of desktop computer, including Macs, but you'll likely need someone tech savvy to help install and support the system over time. There have been significant updates to this system since our 2009 report. Many of these changes were outside the scope of our evaluation criteria. See **Reviews of the Donor Management Systems,** for an in-depth review of this system.

REVIEWS OF THE DONOR MANAGEMENT SYSTEMS

CIVICRM, BY SOCIAL SOURCE FOUNDATION

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 send a receipt 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 and Joomla, and with online payment and form building functionality, but no ability to batch donations for integration with accounting. You'll need someone familiar with installing and configuring open source systems on a web server in order to get you up and running. 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 2009 report.

www.civicrm.org

- **Technical Setup:** Installed on your own Web server. This infrastructure is more complicated than that of most systems reviewed, and you'll likely want someone tech-savvy to set up and maintain the system.
- **Pricing:** Free and open source software.

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 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:** 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 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 when pledges are due.

- **Matching Gifts:** Does not let you track matching gifts that need to be claimed from an employer.
- **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 source, purpose, campaign, sub-campaign and fund, but you cannot split the gift across multiples 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:** Lets you add free-form notes to a gift.
- **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.
- **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.
- **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 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 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 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 via a mobile web browser, but is not customized to make records easy to use on a mobile browser.
- **Attaching Docs to Donor Record:** Lets you attach documents to the donor record and stores them as part of the database.
- **Tracking Donor Social Media Information:** Lets you track website URLs in the donor record.

Prospecting and Proposals

- **Prospecting Workflow:** Lets you assign both a priority and a stage to a donor to manage a prospecting workflow. Can define and track custom workflows if you install the integrated and free CiviCase add-on module.
- **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 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 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 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 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, or export the list.

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 C (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 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.
- **Graphical Capabilities:** Lets you add charts and graphs to reports, though these elements are not customizable.
- **Dashboard Placement:** Lets you place reports on a dashboard for quick viewing.

Payment and Web Site 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 Sign-up Form:** People can easily sign up for your email list via an integrated sign-up 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 sign-ups 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.
- **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 from iPhones via a downloadable app.
- **Volunteer Interests:** Does not provide any specific functionality to track interests in order to match volunteers with jobs, although this could be created through custom fields.
- **Volunteer Work Tracking:** Cannot log any details about specific hours and tasks for volunteers, except by using custom fields.
- **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 and petitions.

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 de-duplication functionality.
- **Programmatic Integration:** Provides an API to allow a programmer to create custom data feeds to an external system.

Accounting Support

- **Existing Integrations:** Does not have any existing integrations with any accounting 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:** Cannot 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, and thus throwing the system out of balance with the accounting system.

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:** The CiviCRM team delivers in-depth training courses for Administrators and Developers about six-to-10 times a year in various locations. Several other consultancies are also offering training programs. Free online tutorials are also available.
- **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 more than 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.
- **Roadmap:** Vendor indicates that priorities for the next year include: Improved accounting package integration, granularity of embedded account codes, improved support for automated workflows, increased automated testing code coverage to 90 percent or more of codebase.

COMMON GROUND CRM, BY CONVIO

Convio's Common Ground, a product built on the Force.com platform (as in Salesforce.com), will be of interest to many nonprofits. It essentially transforms Salesforce.com into a full-featured donor management system while keeping the flexibility for which Salesforce is known. Common Ground has strong support for gift entry and tracking, integrated receipting, mail merging, emailing, householding, and a substantial number of useful standard reports. Support for payment processing and event registration are available through the Online Fundraising module at additional cost. Since our last report, the system has gained the ability to track events and volunteers, and has added a mobile app that lets you access donor records and reports from certain smartphones. Still missing is built in functionality to track membership payments and levels. Common Ground is, however, very customizable, and there are many opportunities for your technical staff or consultant to extend the system. You can also take advantage of the many add-ons built for Salesforce.com via the AppExchange, most of which come at additional cost. The interface is reasonably laid out but novice users will likely require training. There have been significant updates to this system since our 2009 report.

www.convio.com/crm

- **Technical Setup:** Online service hosted by Salesforce.com and supported by Convio.
- **Pricing:** Pricing is based solely on the number of people using the system, starting at $2,400 per year for two users, including support. Additional users are $1,200 per year each.

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 any one field in database or across all fields. The search results are categorized by groups—for instance, households, organizations, people, tasks.
- **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 and a few other common fields.
- **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 by adding a batch number, or associated with a batch after entry by adding it to an existing batch or giving it a new batch number as appropriate. Gifts do not have to be batched.
- **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. Gifts can be entered into a spreadsheet and easily imported, as an alternative.
- **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, 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:** 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.
- **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, and in-kind and stock gifts.
- **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign or fund (called "Designation"). You can split the gift across multiple designations, but not sources or campaigns.
- **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. You can also automate the soft crediting process—to say, for instance, that John Smith always gets credit when a specific donor makes a gift.
- **Gift Notes:** Lets you add free-form notes to a gift.
- **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.
- **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.
- **Seasonal Addresses:** Lets you track people's seasonal addresses, with effective dates. It is possible to set up functionality to automatically switch the primary address for the appropriate timeframe, but it does not do so out of the box.
- **Do Not Contact:** Lets you mark that a particular person should not be contacted; 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"), or two-way ("spouse"), or directional ("boss; works for"). The system automatically creates the relationship for the linked donor if the relationship is a simple two-way one (spouse), but not for a directional relationship ("boss; works for")—to do that, you must manually define the relationship for both donors.
- **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 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 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; 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 click a link on a donor profile to view USPS, Wealth Engine, Hoovers and many other online sources of data for that donor. Each integration requires an additional fee.
- **Mobile Support:** Lets you access constituent records and run reports from mobiles via an application designed specifically for mobile access.
- **Attaching Docs to Donor Record:** Lets you attach documents to the donor record. Attached documents are stored as part of the database.
- **Tracking Donor Social Media Information:** Lets you record a donor's social media links to fields in the donor record. Also provides some significant integration with social media sites including Twitter, but requires installation of modules--most of which are free--from the Salesforce Apps Exchange.

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 a "Cause" in the system that links multiple solicitors and multiple prospects together for tracking and reporting purposes, or flexibly build a number of custom features to support various workflows.
- **Ticklers:** Lets you create a reminder for yourself for a particular task and date; 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 like Wealth Engine in order to provide more information on giving capability and priority, but 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.
- **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 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:** 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:** Cannot automatically mail merge letters on a Mac (running office on OSX) due to reliance on Windows based ActiveX technology. However, 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 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).
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- **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.
- **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 called "workflows."

Querying

- **General Querying Approach:** Lets you create powerful queries with comparative ease, by choosing criteria from a well organized interface.
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- **Querying on Any Field:** Lets you query using criteria from any database field, including custom fields.
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- **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:** 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, but not 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 reports that you create or modify. You can also schedule delivery of 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 or CSV formats, among others.

- **Graphics Capabilities:** Lets you add charts and graphs to reports.
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- **Online Payments:** Lets you set up an online payment form on your website and pull online payments automatically into your database, at additional cost, using the Online Fundraising module.
- **De-duping Online Actions:** Online sign-ups or payments are logged to donors' existing payment records, by exact email address, or by name and mailing address.
- **Event Registration:** Lets you accept online registration fees for events, including multiple ticket prices (such as a VIP ticket) and meal options, at additional cost, using the Online Fundraising module.
- **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, at additional cost, using the Online Fundraising module.
- **Shopping Cart:** Does not support multiple purchases at the same time.
- **Payment Form Customization:** Vendor provides an online payment form which can be customized to completely match your website, at additional cost, using the Online Fundraising module.
- **Transaction Fees:** Vendor does not charge a transaction fee for each payment. Transaction fees are charged by PayPal.
- **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 Online Fundraising module.
- **Self Management of Donor Record:** Lets donors manage their own contact information online, at additional cost, using Online Fundraising module.

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 a standard mail merge process.
- **On-Site Registration:** Provides functionality specifically to support onsite registration and ticket sales.
- **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:** Does not provide any specific functionality to track member levels, payments and expiration dates, except through custom fields.
- **Other Interactions:** In addition to the interactions we've covered here, the system offers support for surveys and petitions.

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 some 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 themselves provide customization services, the system is extensively customizable by any qualified person. They can refer you to one of many consultants who specialize in configuring systems based on the Salesforce.com platform.
- **Access to Source Code:** Cannot access the source code in order to update or add functionality. However, an extensive API allows tremendous access to underlying data and application structure for modifying the system and developing new functionality.

Integration

- **Existing Integrations:** Can automatically exchange data with many external systems, via the applications available in the Salesforce.com App Exchange. You'll need someone with moderate to significant technical skills to set these up.
- **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.
- **Programmatic Integration:** Provides an API to allow a programmer to create custom data feeds to an external system.

Accounting Support

- **Existing Integrations:** While Convio does not specially support any existing integrations with accounting systems, the Salesforce.com platform, on which Common Ground is built, offers a number of third party integrations with various accounting systems.
- **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 Common Ground and your accounting package to reconcile.
- **Reconciling a Batch:** Lets you mark a batch of payments as "reconciled with accounting."
- **Controlling Reconciled Donations:** Each gift record is "locked" after a thank you letter is printed or the batch is closed. 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 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 well organized once you learn it, but many tasks require a fair amount of steps and different pages, making it not the fastest system for data entry and other repetitive tasks.

Support and Training

- **Training:** Vendor provides free training via the Internet.
- **Manuals and Documentation:** Provides help text throughout the application, as well as a manual and recorded trainings.
- **Support:** Provides unlimited phone and email support, as well as a helpdesk chat from within the system, and an online help section from which you can sign up for trainings.

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 1999; Convio Common Ground package has been in use by clients since July 2008. The system was built on the force.com platform, which has been in use since 1999.
- **Clients:** Vendor reports about 400-plus clients for this particular package.
- **Sustainability:** The vendor confirms that the revenue earned from Common Ground covers the personnel and operational expenses required to support it.
- **Roadmap:** The vendor reports that Common Ground will be upgraded to include integration with Constant Contact (providing an additional email option beyond those already supported) and Network For Good (providing an additional online payment processing option beyond those already supported). In the fall of 2011, Common Ground clients will be able to quickly put peer-to-peer fundraising tools in the hands of supporters (helping nonprofits expand their fundraising capacity while harnessing supporters' energy and passion for their chosen causes).

DONORPERFECT, ONLINE AND INSTALLED, BY SOFTERWARE, INC.

SofterWare offers two similar but distinct systems: DonorPerfect Installed (DPI), and DonorPerfect Online (DPO). There are small functional differences between them, but for the most part they are very similar. Both are very interesting, with as strong functionality as any system we reviewed in gift and donor tracking, prospecting and support for accounting needs, and laid out to be among the easiest of the systems to use. The systems are 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. They provide useful mail merge functionality, querying and reporting, and a strong integration with Constant Contact in the online version. However, email functionality is not very strong in the installed version—you can't for instance, mail merge fields into emails. An optional module (WebLink) also adds strong online payment and custom form functionality. Both support volunteers and members and include some events functionality There have been significant updates to this system since our 2009 report.

http://www.donorperfect.com

- **Technical Setup:** DonorPerfect Installed is installed onto PC desktop computers. DonorPerfect Online is an online service hosted by DonorPerfect.
- **Pricing:** The Installed version starts at $2,040 for a single user, $4,995 for two users and $645 for each additional user. Yearly maintenance starts at $510 per year and includes email support. The Online version starts at $567 per year for one user account and up to 500 donors. It can quickly increases in price from there—for instance, 25,000 donors and three user accounts would cost about $4,000 per year. Live technical support is extra, starting at $24 per month for the first user and $5 per month for additional users.

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.
- **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 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.
- **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, and in-kind and stock 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 free-form notes to a gift.
- **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.
- **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 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 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. 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 Wealth Engine by passing donor information from the system to Wealth Engine automatically. Data brought back from Wealth Engine is automatically entered into the system separate from other system fields.
- **Mobile Support:** 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 Docs to Donor Record:** Lets you attach documents to the donor record. Attached documents are stored as as part of the database.
- **Tracking Donor Social Media Information:** Lets you record a donor's social media links to fields in the donor record.

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 a "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 a partnership with Wealth Engine. Wealth Engine 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 Smart 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 through custom security filters.

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.

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, including th 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.

- **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 Web Site 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 Sign-up Form:** People can easily sign up for your email list via an integrated sign-up form on your website, at additional cost, using the WebLink module.
- **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 their WebLink module.
- **De-duping Online Actions:** Online sign-ups 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, at additional cost, using the Web link module.
- **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.
- **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.
- **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 share-a-thon events, product orders with inventory and fulfillment tracking, the ability for online donors to check if their employer 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 most screens in the system.
- **Renaming Fields:** Lets you rename a limited set of existing fields.
- **Moving or Deleting Fields:** Lets you move some fields within the interface, or delete them.
- **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 Wealth Engine.
- **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:** Both DonorPerfect Online and DonorPerfect Installed provide a direct ODBC database connection to all tables in the system to allow a programmer to create custom data feeds to an external system. In addition, DonorPerfect Online includes an API for their Premier level (otherwise it is $348 per month).

Accounting Support

- **Existing Integrations:** Lets you create a file format tailored to upload easily into QuickBooks, Cougar Mountain, Great Plains, 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 on setup 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 workflow, 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:** Vendor provides phone and email support starting at $695 for the installed version and $288 per year for the first user for the online version. Additional users are $60 per year.

Installation and Maintenance

- **Installation and Maintenance:** For the Installed version, 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. For the Hosted version, 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 1981. DonorPerfect Installed has been in use by clients since 1986; DonorPerfect Online has been in use since 2001.
- **Clients:** Vendor reports about 8,000 clients for DonorPerfect Installed, and about 3,000 for Donor Perfect Online.
- **Sustainability:** The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it
- **Roadmap:** Vendor indicates that priorities include advanced charting and graphics capability in reports.

DONORPRO, BY TOWERCARE TECHNOLOGIES

DonorPro has solid 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 visual design is not beautiful, but it's quite usable, with a particularly friendly tool for generating queries and a number of functionalities that speed up repetitive tasks like data entry. Through an integration with Constant Contact, email capability has been greatly enhanced since our last report; the ability to track and to get detailed reports on broadcast email is now included. The system has powerful quick search capability, including phonetic searching to compensate for spelling errors, but you cannot search for data in custom fields. An optional module provides support for events. 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 2009 report.

www.towercare.com

- **Technical setup:** Online service hosted by DonorPro. Alternatively, you could install the system onto your own web server.
- **Pricing:** They charge a $1,500 setup fee (plus $500 for the optional events module) up front, and then a yearly fee of $2,214 plus $0.06 per constituent, for an unlimited number of staff users. Support is included.

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 name, last name, address, constituent ID, social security number, Tax ID and groups. It includes a Soundex search so correct spelling isn't critical. Phonetic search capability allows you to find donors when exact spelling is not known.
- **Quick Search on Custom Fields:** Cannot find a person 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. You can also scan checks and attach them to the gift record.
- **Updating Donor Info via Quick Entry:** The quick entry interface lets you automatically create new donors and update donor contact information when appropriate.
- **Importing Gifts: L**ets 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.

- **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.
- **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, and in-kind and stock gifts.
- **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign or fund. You can split the gift across multiple funds, but not sources or campaigns.
- **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 free form notes to a gift.
- **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 a description of the gift.
- **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 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.
- **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 enter and view free form 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. 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. Decease donors are color coded on the constituents list. Another option must be checked to exclude deceased donors from mailings.
- **Online Integrated Data Cleaning and Appending:** Lets you click a link on a donor profile to view Wealth Engine 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 via a mobile web browser, but is not customized to make records easy to use on a mobile browser.
- **Attaching Docs to Donor Record:** Lets you attach documents to the donor record. Attached documents are stored as part of the database.
- **Tracking Donor Social Media Information:** Lets you record a donor's social media links to contact fields 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. 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 Wealth Engine.
- **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 ConstantContact.
- **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, through their internal email functionality but not through the Constant Contact integration.
- **Graphical Emails:** Lets you create and save graphical email templates to use in emailing groups, using the ConstantContact integration but not the internal email functionality.
- **Scheduling Emails:** Lets you schedule email to send in the future via integrated ConstantContact.
- **Email Server:** If you use the ConstantContact integration, emails are sent via system-integrated ConstantContact, protecting you from blacklisting; ConstantContact 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 most fields in the database for the list, or export the list.

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:** Cannot quickly view favorite reports without navigating a much larger set.
- **Exporting Reports:** Lets you export reports to CSV formats, among others.
- **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 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 Sign-Up Form:** People can easily sign up for your email list via an integrated sign-up form on your web site. Web forms can can 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 sign-ups 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.
- **Disributed/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 functionality to allow you to embed online payment forms into your own website, thus completely matching your website. However, you'll need someone with technical expertise to help set it up. Otherwise, you can add custom fields and a logo to the payment form, but it is not otherwise customizable.
- **Transaction Fees:** Vendor does not charge a transaction fee for each payment. The vendor recommends a specific merchant account, for which the fees are 2.25 percent plus $0.25 per item.
- **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.
- **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, with an optional Events module for $500.
- **Tracking Guests:** Lets you track non-paying guests for particular events, and distinguish them from those who paid, with an optional Events module for $500.
- **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 an optional Events module for $500.
- **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. This functionality requires an optional module at additional cost.
- **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:** Does not provide any specific functionality to track member levels, payments and expiration dates, except through custom fields.
- **Other Interactions:** In addition to the interactions we've covered here, the system offers support for recruitment, inventory management, and a patient services module to securely track information such as diagnoses, medications, and contacts.

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:** 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 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.
- **Programmatic Integration:** Provides some ability for a programmer to access data via HTML, but this is not a robust functionality.

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 training, either via the internet or live, at additional cost.
- **Manuals and Documentation:** Provides context sensitive text throughout the application, as well as a written 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 for more than eight years; DonorPro package has also been in use by clients for more than eight years.
- **Clients:** Vendor reports 500-plus 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.
- **Roadmap:** The vendor reports that ability to add favorite reports to the dashboard is in development. Also in development are SMS/text messaging support, dedicated membership management module, and mobile device optimization.

ETAPESTRY, BY BLACKBAUD

eTapestry provides useful and affordable functionality for small organizations, along with the ability to grow as an organization's needs evolve (although at considerable additional cost). The base product provides strong gift- and donor-tracking functionality, and querying, as well as reasonable email, mail-merged letter and reporting functionality. 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 (for instance, a date, a category and a rating for the same interaction). Many system functionalities require an additional charge, however—for instance, importing data, advanced emailing capability, online payments and Web integration all require additional fees. There are a lot of features and options in the system, and some terminology may not be intuitive to all users, making it more complex to use than many we reviewed. The price varies greatly depending on the number of people using the system, the features you add, and the number of donors you store. A mobile app that allows eTapestry data and reports to be accessed from certain smartphones. Small updates have been made to this system since our 2009 report.

www.etapestry.com

- **Technical Setup:** Online service hosted by eTapestry
- **Pricing:** The price varies greatly depending on the number of people using the system and the number of donors you store. It's free for one staff member to use at a time and up to 500 donors or $456 per year for one staff member at a time and up to 1,000 donors. It quickly increases in price from there. For instance, 20,000 donors and three users who could use the system at the same time would cost about $2,952 per year. Pricing is per concurrent user; you can created unlimited user accounts.. The base system includes unlimited email support. Phone support is extra, starting at $456 per year. A number of the features included in this review require additional modules at additional cost.

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 and address fields. This is optional; you can turn off the duplicate checking.
- **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 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, but this requires an add-on module at additional cost.

- **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.
- **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:** 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 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 set up a first match, but is stored for future gifts from this donor.
- **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 requires more steps than in some other systems.
- **Gift Notes:** Lets you add free-form notes to a gift.
- **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.
- **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.
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- **Automatic Communications Log:** Automatically stores a record of all system-generated letters and emails for each donor.
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- **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 whitepages.com information.
- **Mobile Support:** Lets you access constituent records and run reports from mobiles via an application designed specifically for mobile access.
- **Attaching Docs to Donor Record:** Lets you attach documents to the donor record. Attached documents are stored as part of the database.
- **Tracking Donor Social Media Information:** No ability to track social media information with the donor record without using custom fields.

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- **Prospecting Workflow:** Lets you assign both a priority and a stage to a donor to manage a prospecting workflow. You can also configure "journal entries" to track a date for when a donor reached a particular stage.
- **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.
- **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.
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- **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:** After you print out letters, you must navigate to a different interface to print out labels for that mailing. The built in word processor does not support labels, so you'll need to export your data and merge it by hand, for instance with Excel and Word.

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, with an advanced module at additional cost.
- **Email Server:** Emails are sent through the vendor's email server, protecting you from blacklisting issues. The basic system does not provide help to ensure email goes to donors' inboxes rather than their Spam filters. An "Advanced Email Module," at an additional cost, provides a number of additional emailing features.
- **Unsubscribes:** Donors must contact the organization to unsubscribe from emails in core, advanced module does this for a fee.
- **Email Reports:** The base system does not provide any reports to help you understand how many opens or clicks an email generated in core. An advanced module provides these reports at additional cost.
- **Automatic Emails:** Lets you set up automatic emails based on certain events, like a Web form submission, with an advanced module at additional cost.

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.
- **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.

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 formats, among others.

- **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 Web Site 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 Sign-up Form:** People can easily sign up for your email list via an integrated sign-up form on your website, but requires a module at additional cost.
- **Online Payments:** Lets you set up an online payment form on your website and pull online payments automatically into your database, at additional cost, using the eCommerce module.
- **De-duping Online Actions:** Online sign-ups or payments are logged to donors' existing payment records, matching by matching the name and email address.
- **Event Registration:** Lets you accept online registration fees for events, but requires a module 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, at additional cost. This requires the optional ecommerce 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, but requires a module at additional cost.
- **Membership Dues:** Lets members pay membership dues online, but requires a module at additional cost.
- **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, via a module at additional cost.
- **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, but requires a module at additional cost.
- **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, but requires a module at additional cost.
- **Tracking Guests:** Cannot distinguish non-paying guests for an event from those that paid, unless you configure this using Custom Fields in the Journal. While the Journal could support some functionality here, it would not be as robust as the event tracking provided by some other systems.
- **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.
- **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:** Cannot track any information about interests to help match volunteers with jobs unless you configure this using journal records. While the Journal could support some functionality here, it would not be as robust as the event tracking provided by some other systems.
- **Volunteer Work Tracking:** Cannot log any details about specific hours and tasks for volunteers unless you configure this using journal records. While the Journal could support some functionality here, it would not be as robust as the event tracking provided by some other systems.
- **Membership Tracking:** Does not provide any specific functionality to track member levels, payments and expiration dates, except through custom fields.
- **Other Built-In Interactions:** In addition to the interactions we've covered here, the system offers support for telethons, donor wish lists, and donor loyalty surveys. Donors can also login 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 their Journal functionality.
- **Vendor Customization:** Vendor will extensively customize system to your needs, at 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 for, PGCalc/Crescendo, Quickbooks, Walker Information and the Fundraising Effectiveness Project; all at additional cost.
- **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. This requires an additional module at additional cost.
- **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. Users may occasionally experience pages that are slow to load, which can also slow down work in the system.

Support and Training

- **Training:** Vendor provides training in person and via the Internet at additional cost.
- **Manuals and Documentation:** Provides an online help section with written documentation. Basic videos are available for free online. More advanced level videos are available at an additional cost.
- **Support:** Vendor provides unlimited email and phone support for an additional fee, starting at $330 per year. There are a number of levels and price points available.

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 10 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.
- **Roadmap:** The vendor reports that they are working to get new customers up and running more quick.y, enhance the online feature set, and to make the pricing structure more intuitive.

GIFTWORKS, BY MISSION RESEARCH

GiftWorks is a very friendly, polished system that offers impressive functionality for its low price. It provides useful gift tracking and donor management functionality, with a nice "dashboard" of all your interactions with a donor. Mail-merging, querying, reporting and accounting controls are also solid. While the base product is limited in its support for online interactions, 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, and add-on modules provide useful functionality for events and volunteer tracking. The system is full of wizards and features to make it easy for you to find what you need, but these same features may somewhat slow-down an advanced user somewhat, and no advanced ad-hoc reporting tools are included. Phonetic search capability and ability to enter large numbers of gifts through a quick entry interface are among the small enhancements to the system since our last report.

www.missionresearch.com

- **Technical Setup:** Installed onto PC desktop computers or online hosted service hosted by Mission Research.
- **Pricing:** GiftWorks Standard is $499 per license; the Premium edition is $799 per license. The Volunteer module is $199 per license; the Events module is $299 per license; and the Online Donations module is $149 with a monthly fee of $29.99. Email support is free, but phone support costs $480 per year for your whole organization.

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 CVS 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 one of seven reports to see pledges that are near due or overdue, but staff members are not proactively notified.
- **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 itself needs to be added to the matching donor by hand, but the relationship allows you to see the association and to create queries based on it.
- **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, in-kind gifts (including a description of the gift and value), stock gifts 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 the Gift**: Lets you assign credit in the database for bringing in a gift to as many non-staff members as you like (using the relationship functionality), but only to a single staff member.
- **Gift Notes:** Lets you add free-form notes to a gift, as well as a "task" with a date, topic and campaign information associated with it.
- **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.
- **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 and will prevent communication from being sent.
- **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 describes 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 Docs to Donor Record:** Lets you attach documents to the donor record and store them as part of the database.
- **Tracking Donor Social Media Information:** No ability to track social media information with the donor record without using custom fields.

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:** Cannot create a reminder to be viewed by someone else (although you could create one for yourself to remind them).
- **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:** Cannot easily 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.
- **Grant Tracking and Reporting:** Lets you track and report on grants via custom fields only.
- **Thresholds and Action Triggers:** No special functionality to support thresholds and action triggers.
- **Permissions:** Standard package has only a single level of permissions for the whole system. GiftWorks Premium lets 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. This approach incurs a greater risk that your own email domain will be blacklisted.
- **Unsubscribes:** Donors must contact the organization to unsubscribe from emails.
- **Email Reports:** Does not provide any reports to help you understand how many opens or clicks an email generated.
- **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, or export the list.

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 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, through their very friendly and intuitive "smart lists" feature.
- **Exporting Reports:** Lets you export reports to Excel, .CSV or QuickBooks formats.
- **Graphical Capabilities:** Lets you add charts and graphs to reports, though these elements are not customizable.
- **Dashboard Placement:** Does not let you add reports to dashboards.

Payment and Web Site Integration

- **Processing Credit Cards:** Lets you charge donors' credit cards within the system, by entering them into an online form, with the Online Donation module at additional cost.
- **Recurring Gifts:** Lets you set up recurring gifts which are charged to donors' credit cards at designated intervals. These gifts are not automatically logged in the system, however—in order to be tracked, a system administrator must manually upload them.

- **Web Sign-up Form:** People can easily sign up for your email list via an integrated sign-up form on your website. This requires the Online Donations module, at additional cost.
- **Online Payments:** Lets you set up an online payment form on your website and pull online payments automatically into your database, at extra cost, with the Online Donations module This is implemented through a partnership with Qgiv, an online payment vendor. Signups or online payments are not automatically logged to their existing payment record—you must proof the list and confirm accuracy of payments, then submit to log them.
- **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:** Cannot 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:** 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.
- **Shopping Cart:** Does not support multiple purchases at the same time.
- **Payment Form Customization:** Vendor provides functionality to allow you to embed an online payment form into your own website.
- **Transaction Fees:** Vendor charges $29 per month to support online payments. Merchant account comes with Online Donations service.
- **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. This requires the Online Donations service.
- **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, using their event module, at $299 per license. In addition, these module lets you track 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. This functionality costs an additional $199.
- **Volunteer Work Tracking:** Lets you log volunteer activity for supporters, including date, duration and tasks, but no dollar equivalent for their time. This functionality costs an additional $199.
- **Membership Tracking:** Provides functionality to track member levels, payments and expiration dates.
- **Other Built-In 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 Microsoft Outlook, as well as the United States Postal Service Change of Address Service.
- **Data Export:** Lets you export all data visible to users into another file format, such as .XLS or .CSV.
- **Data Import:** Lets you import files of donor and gift information to the proper fields in the system, but the information must be in a specified file layout.
- **Programmatic Integration:** Does not allow a programmer to create custom data feeds to an external system.

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 at additional cost. "Gift Works University" offers one- to two-hour courses for $79 per course.
- **Manuals and Documentation:** Provides an online help section, documentation, and manuals.
- **Support:** Vendor provides unlimited email support without additional cost. The $39 per month includes phone support for one to three users and free yearly upgrades. Per incident phone support costs $75 per incident.

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:** MissionResearch has been in business for eight years; GiftWorks has been in use by clients 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.
- **Roadmap:** The vendor is currently working on a system update due in 2012.

NETSUITE DO GOOD BETTER FUNDRAISING, BY NETSUITE.ORG

The donor management experience in NetSuite's Do Good Better starts with a well-organized and customizable dashboard that features key performance indicators along with other useful information. 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. The system can process online donations and a $60 per year module will allow enables HTML savvy users to tightly integrate these pages with the look and feel of your website. An array of standard reports is available, and reporting functionality is flexible enough to easily incorporate graphics, as well as data-based charts and graphs. Users on the go will appreciate the ability to view these reports on their smartphones via a NetSuite app. You'll generally find NetSuite Do Good Better has all the basic functionality you need for donor management, though some areas could benefit from more automation. For example, matching gifts are easily configured but you are not alerted to matching possibilities when entering a new donation. NetSuite's "clicks, not code" philosophy means, however, that intrepid users with a little tech savvy can often build automation and other desired functionality without hiring a programmer. NetSuite Do Good Better is granted free of charge to qualifying nonprofit organizations who apply and can demonstrate the ability to implement and make effective use of this system. Product support is included in this grant.

www.NetSuite.org

- **Technical Setup:** Online service hosted by NetSuite
- **Pricing:** Base donation of complete system, five users, support and training is free of charge to qualifying non-profits who apply and can demonstrate the ability to implement and make effective use of this system. Product support is included in this grant. Additional users and modules deeply discounted according to organizational revenue.

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:** Donations are shared with an integrated NetSuite accounting functionality. The system does not group donations into batches for reconciliation with external 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 gifts as they are received to the donation.
- **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. 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 free-form notes to a gift.
- **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 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 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.
- **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 look at 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 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 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:** Lets you click a link on a donor profile to view PostCode Anywhere information for that donor, but this 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 Docs to Donor Record:** Lets you attach documents to the donor record and stores them as part of the database; can also store document links.
- **Tracking Donor Social Media Information:** No ability to track social media information with the donor record without using custom fields.

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:** Does not let you create reports that show all the asks that have been made. Can only report on grant applications.
- **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 included workflow module.

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:** 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 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 send emails that include custom gift strings based on a donor's previous giving history, but the functionality needs to be set up through customization.
- **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 most fields in the database for the list, or export the list.

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.
- **Graphical Capabilities:** Lets you add charts and graphs to reports, though these elements are not customizable.
- **Dashboard Placement:** Lets you place reports on a dashboard for quick viewing.

Payment and Web Site 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 Sign-up Form:** People can easily sign up for your email list via an integrated sign-up 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 sign-ups or payments are logged to donors' existing payment records, matching by matching according to user-defined criteria.
- **Event Registration:** Lets you accept event registration fees in a shopping cart, but includes no event registration functionality beyond this.
- **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, but you will need to pay typical merchant account fees.
- **Refunds:** Lets you easily issue refunds through the system. Donors can request refunds through the system which staff can then process or not.
- **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.
- **Self Management of Donor Record:** Lets donors manage their own contact information online.

Tracking Other Interactions

- **Event Registrants:** Does not provide any specific event functionality.
- **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 Built-In 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 their Custom Entry Forms.
- **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.

Integration

- **Existing Integrations:** Can automatically exchange data with Outlook, box.net, Google Apps, Salesforce, Constant Contact, and more.
- **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, free video training for most areas of product, fully documented developer tools, and an online user group including a dedicated forum for nonprofit users.
- **Support:** Grant includes email and phone support. 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. NetSuite Do Good Better, by NetSuite.org, has been in use by grantees for three years.
- **Clients:** Vendor reports 200-plus grantees using NetSuite.
- **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.
- **Roadmap:** Vendor provides two releases per year. Roadmap includes continued improvement of "clicks not code" configuration tools, more flexible ecommerce functionality and additional configuration of NetSuite to support volunteer management, member management and events management.

NONPROFIT MANAGER, BY TRAILBLAZER

Trailblazer'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 also includes spreadsheet-like pivot table capabilities that let you quickly summarize the data in these reports by practically any columns you could want. Email and mail-merge capabilities are generally strong, as is the system's ability to let you track event registrants and details around volunteers. However, the gift-tracking areas are not as strong as those of some other systems reviewed—for example, it doesn't support seasonal addresses or grant-proposal tracking without custom fields. We review this system for the first time in this report.

www.trailblz.com

- **Technical Setup:** Installed onto PC desktop computers.
- **Pricing:** Nonprofit Manager is priced according to an organization's annual contributions donations and grants, and number of donor records. An organization with under $25,000 in contributions and under 25,000 donor records could pay $1,188 per year, while for the same number of donor records, a nonprofit with $1 Million in annual contributions would pay $4,299 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 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:** For ease of reconciling with accounting systems, donations may be entered as part of a batch by adding a batch number, or associated with a batch after entry by adding it to an existing batch or giving it a new batch number as appropriate. Gifts do not have to be batched.
- **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 on a payment schedule.
- **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, you must check a report to see if a pledge exists.
- **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 by adding the donation, defining it as a matched gift, and then filling out a summary screen that allows you to "add matched pledge".
- **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.
- **Tracking Credit for Gifts:** Cannot assign credit in the database for bringing in a gift.
- **Gift Notes:** Lets you add free-form notes to a gift.
- **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 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:** No specific functionality for assigning and tracking premiums.

Managing Donor Information

- **Multiple Contact Methods:** Lets you track eight phone numbers, two email addresses and unlimited physical addresses. You can label each of them in a notes field—but cannot change the field label itself (for example, "office" and "cell phone")—mark the primary number and address, and track the donors' preferred contact method.
- **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; 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 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 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 emails for each donor.
- **Donor Dashboard:** Cannot easily see all recent communications and donor actions on one screen using the contact history screen; you must go to a couple of screens to get a complete view.

- **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:** No support for mobile devices.
- **Attaching Docs to Donor Record:** Lets you attach images, but not other documents, to the donor record. Attached images are stored as part of the database.
- **Tracking Donor Social Media Information:** No ability to track social media information with the donor record without using custom fields.

Prospecting and Proposals

- **Prospecting Workflow:** Lets you assign both a priority and a stage to a donor to manage a prospecting workflow. There's no ability to define and track a custom workflow, however.
- **Ticklers:** Lets you create a reminder for yourself for a particular task and date; shows the reminder prominently on the bottom 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:** 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, what you've submitted and what has already been approved via log notes only.
- **Foundation Interest Tracking:** Cannot track a particular foundation's interest areas except by using log notes.
- **Grant Tracking and Reporting:** Lets you track and report on grants via custom fields only.
- **Thresholds and Action Triggers:** No special functionality to support thresholds and 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 within the system that include mail-merged information.
- **Mail Merging on a Mac:** Cannot mail merge letters on a Mac, as this is a PC based system.
- **Flexibility of Letter and Thank You Templates:** Lets you create template with some control over format, logos and images, but your ability to create unusual layouts is limited.

- **Personalizing Letters:** Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.
- **Tracking That Letters Were Sent:** Lets you log that a thank you letter was sent by returning to the saved merge in the system and running an update against all records in the merge list, but this step is not done automatically.
- **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 Microsoft Word's formula functionality.
- **Creating One-Off Letters:** Cannot mail merge a single letter 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.
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- **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:** Cannot 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, 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.
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- **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.
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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).
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- **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.
- **List of Favorite Reports:** Lets you quickly view favorite reports without navigating a much larger set.
- **Exporting Reports:** Lets you export reports to CSV format.
- **Graphical Capabilities:** Does not let you add charts and graphs to reports.
- **Dashboard Placement:** Does not let you add reports to dashboards.

Payment and Web Site 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 Sign-up Form:** People can easily sign up for your email list via an integrated sign-up 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 sign-ups or payments are logged to donors' existing payment records, matching by matching the name and mailing 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 customized to completely match your website without additional charge.
- **Transaction Fees:** Vendor does not charge a transaction fee for each payment, but you will need to pay typical merchant account 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.
- **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.
- **Tracking Guests:** Lets you track non-paying guests for particular events, but only in the comments field.
- **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 amount of gifts raised per table or the specific seating arrangements.
- **Nametags:** Does not let you easily create nametags for an event.
- **On-Site Registration:** Does not provide any specific functionality to support on-site registration.
- **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, as well as the dollar equivalent for their time.
- **Membership Tracking:** Provides functionality to track member levels, payments and expiration dates.
- **Other Built-In 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 up to 18 custom fields, which can be placed on most screens in the system.
- **Renaming Fields:** Cannot rename existing fields.
- **Moving or Deleting Fields:** Cannot move or delete existing fields.
- **Custom Constituent Interactions:** Does not let you create your own custom interactions. You can use log notes to track multiple pieces of data about a single interaction.
- **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.

Integration

- **Existing Integrations:** Does not automatically exchange data with outside sources.
- **Data Export:** Lets you export all data visible to users into .CSV files.
- **Data Import:** Lets you import files of donor and gift information to the proper fields in the system, but the information must be in a specified file layout.
- **Programmatic Integration:** Does not allow a programmer to create custom data feeds to an external system.

Accounting Support

- **Existing Integrations:** Does not have any existing integrations with any 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."
- **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:** 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 intially 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 unlimited support and training for unlimited users for all modules.
- **Manuals and Documentation:** Provides an online library with dozens of videos and written documents.
- **Support:** Vendor provides unlimited support at no 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:** Vendor has been in business for 10 years; Vendor is an employee-owned company with no outside debt.
- **Clients:** Vendor reports hundreds of clients.
- **Sustainability:** The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.
- **Roadmap:** The vendor reports that a dashboard, improved graphical display of data, and emailed reminders to task owners are currently on the development roadmap, as is mobile support. Ability to use your smartphone's web browser to look up a donor's contact information, donation history and log notes is in beta testing.

NEON, BY Z2 SYSTEMS

Neon 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 bbc line. Gift data can be easily imported into the system. While there is built-in 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 and broadcast email is useful, and it 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 2009 report.

www.z2systems.com

- **Technical Setup:** Online service hosted by Z2 Neon.
- **Pricing:** The price varies depending on the number of donors you store. For instance, it's $600 per year for up to 1,000 donors, $3,000 per year for up to 25,000 donors, and $4,800 per year for up to 50,000 donors.

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 and email 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 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.
- **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.
- **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.
- **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.
- **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."
- **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 spilt 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 free-form notes to a gift.
- **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.
- **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.
- **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.
- **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. 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, 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.
- **Mobile Support:** Lets you access constituent records from mobiles via a view customized for mobile web browsers.
- **Attaching Docs to Donor Record:** Lets you attach documents to the donor record and stores them as part of the database.
- **Tracking Donor Social Media Information:** No ability to track social media information with the donor record without using custom fields.

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 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:** 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 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.

- **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 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:** Lets you log that a thank you letter was sent by returning to the saved merge in the system and running an update against all records in the merge list, but this step is not done automatically.
- **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:** 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. 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.
- **Automatic Emails:** Lets you set up automatic emails based on certain events, like a Web form submission. 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 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.
- **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.
- **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.

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:** 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.
- **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 Web Site 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 Sign-up Form:** People can easily sign up for your email list via an integrated sign-up 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 sign-ups 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.
- **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:** 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.
- **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. The vendor can match the header or logo for free and for a $300 fee, can match the exact template of your website.
- **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.
- **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.
- **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 via segmentation and merge to word template.
- **On-Site Registration:** Can register new attendees and quickly mark those attending as having arrived by clicking next to their name in the registration roster.
- **Volunteer Interests:** Does not provide any specific functionality to track interests in order to match volunteers with jobs, although this could be created through custom fields.
- **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.
- **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.

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:** Cannot rename existing standard fields.
- **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 their 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.

Integration

- **Existing Integrations:** Can automatically exchange data with phpBB and Google Analytics.
- **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.
- **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 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:** Cannot 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, and thus throwing the system out of balance with the accounting system.

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 $700. On-site training is $1,250 plus expenses.
- **Manuals and Documentation:** Provides an online library with dozens of videos and written documents.
- **Support:** Email support is free of charge. Live chat support is $65 for two hours of help, and unlimited 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 updates.

Product Background

- **History:** Vendor has been in business for seven years; Neon has been in use by clients for seven years.
- **Clients:** Vendor reports 1,000-plus 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.
- **Roadmap:** Vendor reports automated QuickBooks integration for online and offline versions coming in June 2011, fully documented API in late 2011, graphical reports coming late 2011/early 2012, Facebook Login integration coming late 2011/early 2012.

TOTAL INFO BY EASY-WARE

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 it has some of the most integrated and feature-rich mail-merge functionality of any system we reviewed. Relationship management and prospecting features are also particularly strong. Total Info lacks some advanced payment functionality of many systems we reviewed in detail, but stands apart from competitors in its detailed theater-style ticketing and box office functionality—a very unusual feature. 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, and then each person uses the system from their desktop via Remote Desktop Services. The infrastructure supports any kind of desktop computer, including Macs, but you'll likely need someone tech savvy to help install and support the system over time. There have been significant updates to this system since our 2009 report. Many of these changes were outside the scope of our evaluation criteria.

www.easy-ware.com

- **Technical Setup:** Installed onto a Windows server, using an Microsoft Access database, and shared with staff desktop computers (whether Windows, Linux, or Mac) via Remote Desktop Services. This infrastructure is more complicated than that of most systems reviewed, and you'll likely want someone tech-savvy to set up and maintain the system.
- **Pricing:** The price is determined based solely on the number of users. A single user is $795, two users is $1,595, and three or more users is $2,495. Initial purchase includes 90 days of free, unlimited support. After this, support is $360 per year for each user who needs to be able to call support. The vendor suggests running the software on a dedicated server if you have three or more users. (The vendor estimates the cost of the server as under $1,500).

Adding and Tracking Donations

- **Quick Search:** Lets you search the database for an existing person using a form that searches name and contact info.
- **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.
- **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 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.
- **Gift Quick Entry Interface:** Lets you quickly enter a number of gifts at one time through a streamlined quick entry interface. You first define up to six pre-set entry templates, each with different fields and default values as required. Then, when adding a gift, you can choose on the appropriate template to auto fill the fields.
- **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.
- **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, the system notifies you that a pledge exists.
- **Reminders for Pledges:** Staff members are notified that a pledge is near due with optional pop up reminders when the application starts, or when the donor contact record is first selected.
- **Matching Gifts:** Lets you track matching gifts that need to be claimed from an employer through a feature that can automatically create a pledge (for $0) against the employer when you enter the gift to be matched. The system also tracks the match rate.
- **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, in-kind and stock gifts, and event and auction revenue.
- **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.
- **Gift Notes:** Lets you add free-form notes to a gift.
- **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 track gifts given "in honor of," and tributes as tags, and schedule notifications—for instance, summary thank you letters—to the honorees to send immediately, or on a schedule.
- **Premiums:** No specific functionality for assigning and tracking 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.
- **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 display an optional, prominent message as a popup on the donor screen to notify staff that a particular person should not be contacted. Alternatively you can see this information on the donor screen.
- **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 a two-way relationship ("spouse") between donors, but not a one-way relationship ("would like to meet") or a directional relationships ("boss; works for").
- **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships using a network view to see the degrees of separation between people in the network, and the total giving for their network. You can also email people directly from this network view.
- **Householding:** A database record describes a single individual and all their contact information and actions. In addition, each individual is part of at least one "Family". These families link together those in the same house-

hold or business. For each family, you define the head of the household who will receive mailings.

- **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 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 using the contact history screen.
- **Giving Totals:** Lets you easily see all recent gifts in one click 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. Every individual is part of either a family or organization.
- **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.
- **Mobile Support:** No support for mobile devices.
- **Attaching Docs to Donor Record:** Lets you attach documents to the donor record by storing the document's filename and path in the database.
- **Tracking Donor Social Media Information:** Lets you track social media information with the donor record by recording this information as an "email type."

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. There's little ability to define and track a custom workflow, however.
- **Ticklers:** Lets you create a reminder for yourself for a particular task and date; shows the reminder prominently on startup of the application.
- **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.
- **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 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. 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 individuals access to granularly view, edit or delete data for a wide variety of system functions.
- **Field Level Permissions:** You 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 that include mail-merged information.
- **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 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 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 their names at gift entry. You can then create letters for everyone in the queue at once, by using a "batch" mail merge process to find all gifts not yet acknowledged. Alternatively, you could run a query to do this.
- **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:** Automatically asks if you'd like to print labels for each letter printed. The system provides advanced functionality in this area. For instance, if you're using a printer supported by the system, you can also print specific labels on a page of partial labels, barcode envelopes, or print images on the envelope.

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. The system uses the same sophisticated 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.
- **Graphical Emails:** Lets you send graphical emails if you create the appropriate HTML code outside the system, but not create or save templates.
- **Scheduling Emails:** Lets you schedule email to send in the future.
- **Email Server:** Emails are sent via your own email server. This approach incurs a greater risk that your own email domain will be blacklisted.
- **Unsubscribes:** Donors must contact the organization to unsubscribe from emails.
- **Email Reports:** Does not provide any reports to help you understand how many opens or clicks an email generated.
- **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, but the interface to do this is less intuitive than some other tools. As your first step in defining either a "Simple" or "Compound" query, you must first select a "data source" (i.e. some logical grouping of fields). Most users will requires training to understand what is in each data source.
- **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 most fields in the database for the list, or export the list.

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, PDF, Word or CSV formats, among others.
- **Graphical Capabilities:** Lets you add charts and graphs to reports, though these elements are not customizable.
- **Dashboard Placement:** Does not let you add reports to dashboards.

Payment and Web Site 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 Sign-up Form:** People can easily sign up for your email list via an integrated sign-up form on your website, via an existing integration with Formsite.com.
- **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 sign-ups or payments are logged to donors' existing payment records, matching by matching by name, phone number, email address and mailing address.
- **Event Registration:** Lets you sell tickets for theater style events, including multiple ticket prices (such as a VIP ticket) using a built in PrintTixUSA integration. Conference style online event registration is not supported except in a basic way through Formsite.com and PayPal Customization
- **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:** Members cannot pay membership dues online in a way that is automatically integrated with the system.
- **Shopping Cart:** Does not support multiple purchases at the same time.
- **Payment Form Customization:** Vendor provides an online payment form (using Formsite.com) which can be somewhat customized to match your website's colors and fonts, but not your website navigation. The box office functionality offers more customization options.
- **Transaction Fees:** Vendor does not charge any transaction fees for payments supported through Formsite.com, although you will need to pay typical merchant account fees. For online box office ticket functionality, the vendor charges the ticket purchaser a convience fee, which covers the cost of all credit card fees.
- **Refunds:** Lets you easily issue refunds through the system.
- **Recurring Payments:** Lets donors set up recurring payments online (such as monthly donations), which are automatically charged to their credit cards.
- **Self Management of Donor Record:** Lets donors manage their recurring payments and credit card information, but not their 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 and seating arrangements. You cannot track the amount of gifts raised per table except via a custom field.
- **Nametags:** Lets you create nametags for an event via their standard mail merge process.
- **On-Site Registration:** Provides functionality specifically to support selling tickets onsite (this functionality is geared towards their auction module, and all registrants are termed "bidders"). There is sophisticated support for ticketing and theater style events.
- **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 Built-In Interactions:** In addition to the interactions we've covered here, the system offers support for box office and ticketing functionality, as well as for walk-a-thons and other offline team-based fundraising, auction management, class and camp registration, economic development programs, legal case management, film festival management, pet tracking (as for animal shelters), and a point of sale system.

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:** Cannot customize field names.
- **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). The vendor reports that they frequently add fields to support additional interactions upon request.
- **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 WealthEngine, formsite.com, PrintTixUSA, IATS, DiamondDonate and SendGrid.com
- **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:** Does not allow a programmer to create custom data feeds to an external system.

Accounting Support

- **Existing Integrations:** Lets you create a file format tailored to upload easily into QuickBooks. As you can set up G/L account numbers and classes in Total Info, this information can also be output and uploaded.
- **Approach to Batching:** Lets you create batches of payments in order to reconcile 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:** Each gift record is "locked" after a thank you letter is printed or the batch is closed. Those who have permission to unlock a gift could then do so and update it.

Ease of Use

- **Ease of Use for Novices:** Complex. The system has a technical look to it, with a number of complex screens. Many tasks can be done in a number of different ways, and with a number of different clicks, meaning it's not always clear how to do things. Many users will require training.
- **Speed for Expert Users:** Moderate. The system is feature rich, which can speed a number of tasks, and there are a number of shortcuts for quickly entering data. However, a number of tasks require a lot of clicks and steps.

Support and Training

- **Training:** Vendor provides training via the internet at an additional cost of $75 per hour.
- **Manuals and Documentation:** Provides an online library with videos and written documents.
- **Support:** Vendor provides unlimited email and phone support for a yearly fee of $360 year.

Installation and Maintenance

- **Installation and Maintenance:** Total Info must be installed on Microsoft Windows machines. This can either be a server, in which case users would access it through a remote desktop. Alternatively, the system can be installed on Windows PCs in a peer-to-peer configuration. The vendor recommends Windows 7 machines with Pentium processors if using the peer-to-peer configuration. Under both configurations the vendor recommends a gigabit ethernet network, though a 100 megabit network also works.

Product Background

- **History:** Vendor has been in business, and Total Info has been in use by clients since 2001.
- **Clients:** Vendor reports about 500 clients for this particular package.
- **Sustainability:** The revenue earned from this donor management system covers the personnel and operational expenses required to support it.
- **Roadmap:** The vendor is working on SendGrid.com integration for email, and an improved reporting wizard. Also in development are support for integrated online subscription purchases, online event registrations, and online membership management.

APPENDICES

APPENDIX A: METHODOLOGY

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 a system should be included in the report if:

- 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 $4,000 in the first year.
- More than 100 organizations in North America had actually purchased it for less than $4,000 as of February 2011
- More than 50 percent of the system's clients are nonprofits, exclusive of churches and membership organizations.
- Some official entity (whether vendor or an open source governance group) is proactively managing 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 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 known to Holly Ross, Laura Quinn, Eric Leland or Robert Weiner, and then followed up via an additional email, and finally a phone call if they didn't respond.

We then distributed an open invitation to participate through the Idealware and NTEN blogs and on a number of email discussion lists, including NTEN's national list, Progressive Exchange, Information Systems Forum and FNDSVS.

Based on the data gathered in this preliminary survey, we identified 29 systems that met our criteria. This list of vendors was created completely independently from the process of soliciting any vendor for funding. NTEN was responsible for vendor solicitation while Idealware was responsible for creating the vendor list and the report. None of the reviewers or Idealware staff members involved in this report know what vendors participated in funding the report.

2. Update review criteria.

In February 20011, Idealware contacted six 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 2009 report. Based on their input, we changed a handful of criteria and added about 20 new considerations to take into account in system reviews.

3. Complete summary reviews.

In March and April 2011, Idealware conducted half-hour demos of all 29 systems included in this report. Each vendor was sent some preliminary questions about their system and a list of nine high-level tasks to be demoed; 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 to 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 10 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 10 top systems, we conducted two- to three-hour demos, during which we reviewed each system for 140 features and attributes. Our detailed reviews evaluate each of our top 10 systems on these 140 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 18 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 10 top systems.

APPENDIX B: HOW WE EVALUATED THE SYSTEMS

Fair	Solid	Excellent
Adding and Tracking Donations		
• Lets you quickly search the database for an existing person. • Adding a single gift into the system is a straightforward process of finding a donor and filling out fields. • Lets you enter pledges for future gifts, including the amount and scheduled date. • Can track a note on a gift. • Lets you add free-form notes to a gift. • Lets you associate gifts with an organization, as opposed to individuals.	• 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. • The system provides functionality to allow at least two of the following three features: 1. Lets you record zero dollar donations 2. Lets you record gifts given “in honor of” or “in tribute to” 3. Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like.	• Lets you find a person by searching data entered into custom fields. • When using the interface to add new gifts, the system asks if you want to apply them against existing pledges. • 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. • Lets you easily map and import donor and gift information in custom file formats without additional charge. • The system can create a full set of pledges based a payment schedule, which you can then customize as needed. • Lets you assign and track premiums, including the tax deductible amount, potentially via custom fields

<table>
<tr><th>Fair</th><th>Solid</th><th>Excellent</th></tr>
<tr><td colspan="3">Managing Donor Information</td></tr>
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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.
Lets you track relationships between donors and label them (for example, “family member,” “co-worker”) with custom relationship types.
Lets you keep a manual log of communications such as phone calls or personal meetings.
Lets you mark that a particular person should not be contacted.
Lets you track the source of a particular donor.
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Lets you create a profile for an organization and track the people who work for it.
Automatically stores a record of all system-generated letters and emails for each donor.
Lets you record donors as deceased
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<td>
Lets you track as many phone numbers and addresses as you like
Lets you track people’s seasonal addresses with effective dates, and automatically switches primary addresses for the appropriate timeframe.
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.
Lets you easily see all recent communications and donor actions on one screen.
Provides specific householding functionality to allow you to easily segment out in a query a list of who should be mailed
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.
Lets you define directional relationships between donors (“boss; works for...”) and the system automatically assigns the appropriate relationships for both donors.
Lets you attach documents to the donor record and stores them as part of the database.
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Fair	Solid	Excellent
Prospecting and Proposals		
• Lets you assign both a priority and a stage to a donor to manage a prospecting workflow, at least through custom fields • Lets you create a reminder for yourself for a particular task and date. • Lets you easily see the list of donors assigned to you as a solicitor by running a segmentation report.	• 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. • 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. • Lets you track and report on grants separately from other donations	• Provides advanced built-in functionality to track prospects, OR Provides detailed extensive functionality to define and track a custom workflow. • Can see reminders you or others have set prominently displayed at the appropriate time. • 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 • Lets you create reports that show all the asks that have been made, as well as the gifts.
Permissions		
• Can define multiple user groups that have different access to system functionality.	• You can grant individuals access to granularly view, edit or delete data for a wide variety of system functions.	• Lets you define user or group permissions on a field-by-field basis.
Mail-Merging Letters		
• Can mail merge data into letter templates without exporting data from the system. • Lets you print letters through the system for a particular group of people who meet a sophisticated set of criteria. • Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.	• Automatically logs for each donor that a letter was sent when you confirm that a batch of letters were printed. • 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. • Lets you easily print labels for a set of people from the same query result page used to print letters.	• Lets you create letters that include custom gift strings based on a donor's previous giving history. • Lets you flexibly create letter templates in Word or OpenOffice with complete control over layout, formats, logos and images. • 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.

Fair	Solid	Excellent
Emailing		
• 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 OR Lets you schedule email to send in the future. • 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 OR Lets you send emails that include custom gift strings based on a donor's previous giving history • 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. • Donors can easily unsubscribe from emails without involving the organization.
Querying		
• 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

Fair	Solid	Excellent
Reporting		
• 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.
Payment and Web Site Integration		
• Lets you charge donors' credit cards within the system.	• Lets you set up an online payment form on your website and pull online payments automatically into your database, without the need for a programmer.	• Lets people easily sign up for your email list via an integrated sign-up form on your website. • Lets donors set up recurring payments online (such as monthly donations) which are automatically charged to their credit cards. • Lets you accept online registration fees for events, including multiple ticket prices (such as a VIP ticket) and meal options. • Lets members pay membership dues online. • Lets donors manage their own records online.
Tracking Events		
• Lets you track who has registered for a particular event, potentially with custom fields intended to track custom interactions. • Lets you easily create nametags for an event	• Lets you track who has registered for a particular event without using custom fields.	• Lets you track non-paying guests for particular events, and distinguish them from those who paid. • Lets you manage table details for an event, including seating arrangements, and the amount of gifts raised per table.

Fair	Solid	Excellent
Tracking Other Built-In Interactions		
• Provides at least substantial custom field functionality to allow you to reasonably support some basic volunteer or membership information.	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.	• 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.
Customization		
• Lets you customize drop-down values for fields such as campaigns, type of relationships and many others. • Lets you add at least a few custom fields.	• Lets you add at least fifty custom fields. • Custom fields can be placed on many screens in the system. • 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.	• Lets you create your own custom interactions, in order to track multiple pieces of data about a single interaction, without the need for a programmer. • Lets you move existing fields within the interface, or delete them altogether.
Integration		
• 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.	• Lets you export all data visible to users into another file format. • 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. • Lets you import data without an additional charge.	• Lets you export all data visible to users into another file format. • Lets you map different files of donor and gift information to the proper fields in the system, and import the data. • Provides a method to allow a programmer to create custom data feeds to an external system, with access to most fields in the system.

Fair	Solid	Excellent
Accounting Support		
• Can export transactions in order to sync them with an accounting system.	• Can create and track accounting batches in order to ease the reconciliation process with an accounting system.	• Can mark a batch of payments as "reconciled with accounting." • There are controls in place to prevent unauthorized people from editing a payment that has already been reconciled.
Ease of Use		
• Users can use the system, given enough training.	• The system is at least Moderately easy to use for both novices and experts.	• The system is at least Moderately easy to use for both novices and experts, and is Easy for one of these.
Support and Training		
• Training and support is available, at least from the community. • Provides written documentation.	• Provides extensive documentation, including online documentation, a user community or videos. • Training and support is available from vendor, potentially at an additional charge.	• The vendor provides initial training over the Internet at no additional cost. • The vendor provides phone support for under $500 per year.
Ease of Installation and Maintenance		
• The system can be installed and maintained by a reasonably qualified IT staff.	• 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.	• As is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain
Product Background		
• The vendor reports more than 100 clients.	• The system has been in use for more than three years, OR The vendor reports more than 500 clients. • The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.	• The vendor reports more than 1,000 clients. • The system has been in use for more than five years.

APPENDIX C: AUTHORS AND CONTRIBUTORS

Authors

Jay Leslie

As senior researcher at Idealware, Jay is responsible for researching software choices through demos, interviews and surveys, and using that information to create easy-to-use resources. He brings to his role 15 years of experience in information technology management in the nonprofit and philanthropic sectors. As the lead researcher in this report, he conducted all the demos, wrote the first draft of all reviews, and worked with the vendors to identify any inaccuracies. He has no experience using or implementing any of the systems included in this report.

Andrea Berry

Andrea oversees Idealware's fundraising and training activities, including the Field Guide to Nonprofit Software, sponsorship, corporate and individual giving, grants management and online seminars. 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 10 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, implemented GiftWorks and eTapestry, and used ResultsPlus.

Laura S. Quinn

Laura is the executive director of Idealware. She defined the methodology used for the report, participated in some of the reviews, and managed the 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.

Chris Bernard

Chris is Idealware's senior editor, and a longtime writer and journalist. He edited all of the text throughout the report. He has no experience using or implementing any of these systems.

As full disclosure, Colin Pizarek, who worked on-site at Idealware as an Americorp VISTA member from July 2010 to March 2011, now works for Z2 Systems. Z2 Systems creates and distributes Neon, one of the systems covered in this report. Colin was not involved in any vendor reviews, report updates or any other work relating to this report.

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