# A CONSUMERS GUIDE TO LOW-COST FUNDRAISING SOFTWARE

**SEPTEMBER 2020**

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# FOREWORD ▶▶▶

At Tech Impact, we believe in bringing unbiased research about important technology issues to the nonprofit sector. If there were ever a specific category of software that was directly developed for nonprofit organizations, it is fundraising software. I am grateful to all of our sponsors and advertisers, who feel as passionate as we do about the importance of this report.

Fundraising is something nearly every organization faces, yet the options for software that enables this important function are significant. This research is meant to provide you with an easy-to-follow guide to many of the solutions on the market today and to help you align your organization's needs to the features and functions that you are most likely to use in your organization.

If you are considering your first fundraising software investment or looking to upgrade your software to keep up with the demands of your development team, I am hopeful that you find this guide very useful. I encourage you to share your feedback with us so that we can strengthen future publications. And, please pass it along to other organizations who might benefit.

Most importantly, I am hopeful that this information helps you to strengthen your processes and deliver efficiently and effectively on your mission.

Thank you for your commitment to our community.

Sincerely,

Patrick Callihan
Executive Director, Tech Impact

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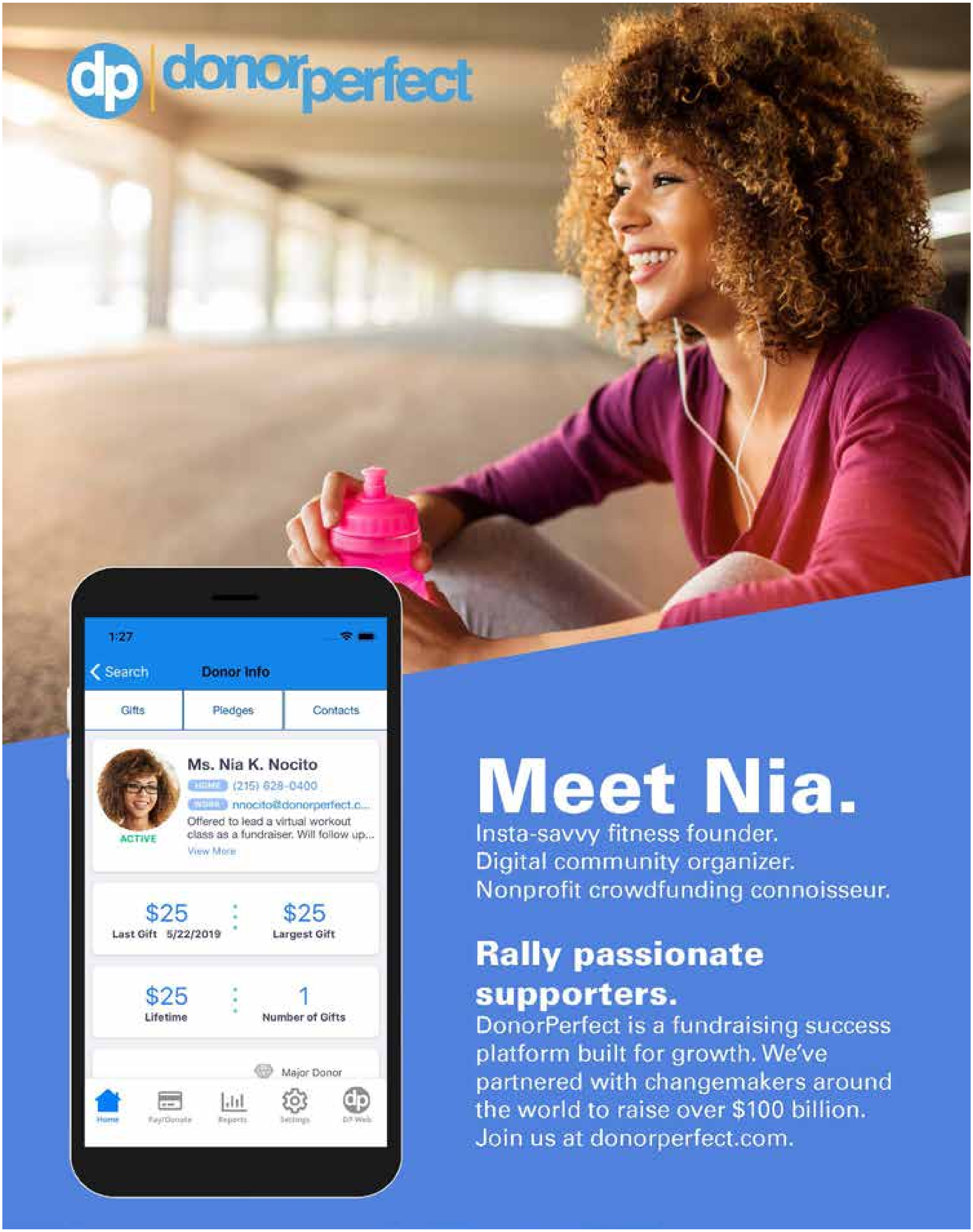
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# INTRODUCTION

Americans gave nearly $450 billion to charities in 2019, according to data from Giving USA, more than two-thirds of which came from individual donors. Charitable giving is the lifeblood of nonprofits. Which means that tools to manage donations and donor relationships are a critical need.

Small and mid-sized nonprofits constrained by limited budgets and small staff need affordable tools to help them manage and grow their fundraising programs. Fortunately, today's marketplace offers myriad options for nonprofits seeking low-cost fundraising tools.

At its core, successful fundraising is built on relationships. For major gifts programs, these are one-on-one relationships between development officers and high net worth individuals. But this model is not feasible for direct response fundraising. For this group of donors, nonprofits look to donor engagement strategies that deepen connections between the organization and donors. In recent years, many donor management systems have broadened their offerings to keep pace with the growing desire of nonprofits to deepen engagement with their constituents.

Fundraising software allows nonprofits to provide mass personalization—letting individuals know they are "seen" by a nonprofit and are integral to the organization's success. To accomplish this, a system must be able to collect and repurpose a lot of data about each constituent.

Nonprofits need strong reporting tools to understand who has given, why they have donated, and how to increase the likelihood of getting this donor to give an additional gift. They need to be able to reach their donors where they are—either through postal mail, telephone, email, social media, or mobile devices. They need to have a system that their entire staff can access and use so that fundraising and communication strategies and tactics are data-driven and responsive to changes.

In today's world, that means nonprofits need to consider systems that facilitate work from any geographic location, that allow them to collect donations online, and that allow them to communicate directly with their donors.

This report looks at 23 systems that do just that. And because the individual needs of nonprofits vary greatly, there is no one-size-fits-all solution out there. The system that checks the most boxes may not necessarily do everything well or be easy to use. A system that does a few things really well is likely a better fit for a nonprofit that focuses primarily on those few things. That's why we're not telling you which of these 23 systems is the best—instead we've laid out 12 use cases that correspond to ways in which nonprofits leverage their software, and selected one system to represent each use case.

For the first time, we've also created a digital version of this guide with additional functionality to help organizations filter systems by the criteria most important to them and compare the available options. By looking at what fundraising systems can do and deciding which features are most critical to your needs, you can narrow your search to the options that best meet your needs and better navigate this competitive marketplace.

# WHAT'S CHANGED IN THIS REPORT?

This is the fifth edition of this report, and since the first edition, much has changed—most obvious, of course, is the name. Why did we change the title from **A Consumers Guide to Low-Cost Donor Management Systems** to **A Consumers Guide to Low-Cost Fundraising Software?** Because we think the new one better reflects how nonprofits use the systems we review in its pages and better matches how vendors talk about their products. (You can learn more about the terminology in the next section, *What Types of Systems are Available?*)

We've changed, as well. Since the last edition of the this guide, Idealware merged with the nonprofit Tech Impact—a longtime provider of education and services to the sector—to create an organization with more resources, more expertise, and a wider reach.

The marketplace for systems has changed. As the nonprofits who rely on them changed how they do their work to keep pace with the times, the vendors who build the systems worked hard to meet those changing needs. The growth of online fundraising made the ability to accept online donations critically important. A series of high-profile data breaches also underscored the importance of strong security measures to protect systems and data.

The world itself was changing, too. As we conducted our research, nonprofits worldwide were adjusting to the impacts of a global pandemic that upended traditional office-based staffing models, discouraged in-person events, and forced them to rethink the ways they could deliver on their mission, pushing remote work and flexible online tools to the forefront of nonprofit IT priorities.

At the same time, we initiated a series of conversations with nonprofit staff, subject matter experts, and software vendors to find out how the sector uses this guide in the software selection process and identify ways to make it more useful.

There's no shortage of excellent software on the market. At a high level, every system in this guide—and some that did not meet our eligibility requirements for one reason or another—is capable of meeting the general needs of most nonprofits. It's in the details, where the specific needs of every nonprofit differ, that selection becomes most important. There is no "best" software—the right software for you is the one that best meets your individual needs.

To that end, we've expanded our use case models to make it easier than ever for nonprofits to find one that most resembles their own needs and models for how they might use a donor management system. For each, we've listed the systems that we think are best-suited to that particular use case. We've also updated our evaluation terminology to better reflect changing knowledge, and added a number of new considerations—such as text messaging capability, payment processing flexibility, login security, automated workflows, and much more—to better differentiate the systems' features and abilities.

## The Systems

For this edition, we surveyed vendors of nearly 40 systems, and participated in vendor demos of the 23 that met our eligibility criteria based on their responses to our survey questions. Of those 23 systems, we chose 12 to represent each of the use cases we identified, and conducted longer demos—and wrote longer reviews—of those dozen systems.

We'll talk more about that methodology elsewhere in this guide, but there's one takeaway we cannot state clearly or frequently enough—the 12 systems we chose for longer demos and reviews are not necessarily the best 12 systems, nor are they ranked in any order. We chose them because they best met the needs of the use cases we identified. But in the real world, each nonprofit's needs are different, even among those with similar use cases, and can vary dependent upon everything from size and budget to the abilities of its most- and least-knowledgeable users and countless other factors. Our overarching goal for this guide is to teach you how to make smart decisions about technology, and to provide you with as much information about the different systems available to you for you to make that decision on your own. Our reviews and choices are simply a starting point for your own due diligence.

This edition of the guide marks the inaugural appearance of a number of new systems:

- CharityEngine
- Eleo
- Keela
- NationBuilder
- Virtuous

In addition, several systems reviewed in the 2017 edition merged with or were acquired by other vendors and no longer qualify for this report:

- DonorCommunity merged with Telosa Software to create Arreva
- Arreva acquired MatchMaker FundRaising Software
- Blackbaud acquired NPOconnect

For this edition, we revised our inclusion criteria to consider only systems that offer a cloud-based access option, facilitate online donations, allow users to create a variety of online forms, and provide either native email marketing tools or a pre-built integration with an email marketing platform. In practice, this means some systems included in the last edition did not meet our new eligibility criteria:

- Abila Fundraising 50
- Akubo CRM
- BasicFunder Premier
- DONATION
- FastFund Raising Online
- ResultsPlus
- Total Community Manager
- Total Info

Each of these systems has its own strengths and weaknesses, and any might be a good fit for your particular needs, regardless of our own eligibility requirements.

Finally, while we made numerous attempts to contact vendors for systems we had previously included, several did not respond:

- Causeview
- Donor Tools
- FundRaiser Select
- Sustain Fundraising Management Software
- Talisma Fundraising Online

# WHAT TYPES OF SYSTEMS ARE AVAILABLE?

Whether you're looking for your first system or hoping to replace the one you're currently using, you've got a number of options from which to choose. As you start to consider them, think through the high-level options before delving into the detail of features.

## Donor Management vs. CRM vs. Fundraising Platform

Past editions of this guide focused on *donor management systems*—software built specifically to track donors, and in some cases, do little else. Some offered little functionality to support event attendees, volunteers, members, or other constituents.

But many vendors have broadened their offerings to keep pace with the growing desire of nonprofits to deepen engagement with all their constituents, and many donor management systems evolved into *Constituent Relationship Management systems,* or CRMs. Originally developed to provide sophisticated data collection and analysis tools for corporate sales and marketing purposes, CRMs are increasingly popular with nonprofits.

In addition to functionality to track donors and other constituents, *fundraising platforms* also let you conduct online fundraising campaigns and collect online donations. As online fundraising continues to grow year over year, both in terms of total dollars raised and as a percentage of all fundraising, nonprofits are more interested in software that allows them to use the data from their constituent databases to create and execute holistic fundraising strategies.

Which is right for you? Again, it depends—as with any software, there are trade-offs to each. No one type of system is going to meet everyone's needs.

Donor management systems were designed with development staff in mind, but sometimes lack the flexibility of a CRM. While more flexible, corporate-focused CRM systems will likely need a good deal of configuration to meet the needs of nonprofit fundraisers and can sometimes be daunting to non-technical staff. Donor management systems and CRMs that offer online fundraising add-ons may not have the depth of a system purpose built for online fundraising.

The type of system that is right for you is the one that provides you the tools you need in a package that meets your budget and technical ability.

## Hosted vs. Installed Systems

Many donor management systems today are cloud-based, which means the software resides on a server hosted by the vendor and most often accessed via a web browser. Several vendors host their databases in the cloud, but the user needs to have the system interface installed on their computer to access their database. With remote work growing in prevalence, even prior to COVID-19, cloud-based systems allowed nonprofit staff to maintain productivity no matter their geographical locations.

The benefits are many: the software and all data is stored securely on the vendor's servers; you don't have to purchase any hardware; the vendor handles software updates and data backups; and staff can access the system from anywhere there's an internet connection. You typically pay a monthly or yearly subscription fee 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 and installed onto your network and staff computers. Many of these 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. If you'll have multiple users, some require a dedicated server—literally a computer that does nothing but run the software. 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.

Installed system vendors typically charge a "license" fee to buy the system, which is often based on the number of staff members (also called "users," "seats," or "licenses") you'll have using the system. After you pay the license fee, you're not committed to paying anything else, but most vendors offer technical support services and the ability to get free updates to the system (such as new software releases with improved functionality) for a continuing annual 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.

## Open-Source Systems

Generally speaking, open-source software is software whose underlying source code the developer makes freely available so that others can use, modify, and distribute it. Some of the most popular website Content Management Systems, including WordPress and Drupal, are open-source. There are no purchase costs or subscription fees for open-source systems—but that doesn't mean they're free.

They need to be installed and customized to meet your workflows and needs. They require hardware to run on, and someone needs to maintain them and provide training on them. As the saying goes, open source systems are "free like puppies, not free like beer," because over their lifetime, they will require a lot of care and feeding.

While open-source systems are highly customizable and flexible, you'll need to work with a consultant or highly trained staff member to set them up and migrate your data. (Only one system in this guide, CiviCRM, is an open-source product—it includes donor management, fundraising, marketing, event management, and volunteer tools.)

## Custom-Built Systems

What about building or commissioning your own custom database? You wouldn't be the first—but fair warning, it's very unlikely to be your best path. For one thing, donor management processes are much studied and well understood, with lots of systems purpose-built to support them—many of which are very configurable. For another, 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 need to pay to create the system initially, and keep paying to maintain it—not to mention that you'll never get any upgrades that you don't pay to build.

If you have needs or processes unique to your organization, you're probably better off starting with an existing system and customizing it, even extensively, if necessary. Existing systems will have basic functionality—such as integrated mail-merging, emailing, and standard reporting—that would take you days or weeks to build yourself.

Look for an extensively customizable system, like a CRM platform or open-source platform, 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 we've said elsewhere in this guide, and which we'll repeat to make sure the point is clear, there is no "best" system—the right system for your organization is the one that helps you do your work better and more efficiently. As you begin to assess *your* own needs, it can be helpful to understand the features and functions available among the systems in this guide to meet them.

Remember, there's often an inverse relationship between functionality and ease of use. Systems with more advanced functionality—or that have more features—can seem daunting to non-technical staff.

When considering ease of use, keep a few questions in mind:

- Are screens neatly laid out, with clear links and action buttons?
- Does the design help you see important information?
- Are fields and functions intuitively named and easy to find?

The order of steps to follow also matters. Do you select a set of constituents, then choose an action? Or do you choose an action first, then select the set of constituents? Either can work, but make sure the system makes the order clear—and that the order fits the way you prefer to work.

It's OK for software to have a learning curve, but it should be learnable—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, making your investment in the new software a waste of time and money.

Systems should not just support basic users, they should also effectively support power users—in this case, often development staff members who spend hours each day using the tools. Being able to quickly add gifts, find information, and run the right queries and reports can make a big difference in their efficiency and win over their support for the system.

## Donation Management

No fundraising system would be effective without the ability to easily enter and manage donations, but the systems we looked at vary a lot in terms of capabilities in this area.

Most offer several ways to enter a donation: from an individual or organization contact record; from a donation or gift menu; using a quick entry form; or importing a spreadsheet of gifts into the database. When you enter a gift, most systems allow you to search for the donor in the system to prevent duplicate records. But will the system provide suggestions based on a partial match of a name? Does it offer a Soundex search that will bring in results that sound similar or a fuzzy search that brings in non-exact matches?

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 time frame that can be transferred as a single entity to your accounting system).

Other systems offer little support for batches, which can be a problem if you're used to reconciling that way. Some offer a middle ground, such as defining batches for gifts you've already entered. Can you associate a gift with a fund or even split gifts across funds?

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 log gifts against those pledges when the gift is made. Does the system alert you to open pledges when you are entering a gift? Will the system allow you to set up automatic pledge payments?

Monthly donors—also known as sustaining donors or recurring donors—are becoming the cornerstone of many nonprofit fundraising programs. The number of sustaining donors has increased each year over the past five years, according to data from the 2020 donoCentrics Sustainer Summit.

> ***Monthly donors—also known as sustaining donors or recurring donors—are becoming the cornerstone of many nonprofit fundraising programs.***

Some systems manage recurring donations via a pledge module, while others separate out the functionality and reporting. Does the system automatically process recurring donations each month, or do you need to trigger the payment processing? How does the system handle recurring donors with expiring credit cards? Do you have to run a report each month and contact donors to get updated card information? If so, can you schedule this report to run automatically and be sent to you? Will the system or payment processor automatically send out notifications to donors that their cards are expiring? Some systems have the ability to automatically update expiring credit cards, but may require an additional fee.

How does the system support other gift types? Does it support gifts "in honor of" someone, tribute gifts, stock gifts, in-kind gifts, cryptocurrency gifts? Can you track part of a gift that isn't tax deductible because a donor received a "premium" (a thank you gift, like a T-shirt, that has value)—and can you track and report on premiums for fulfillment purposes?

Define what you really must track for each of these gift types 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 knowing *what* made a donor support your organization and *how* the money came in will help you understand what types of appeals work best for your supporters. Can you easily track a gift by a campaign, appeal, or source? Can you log a "soft credit" for gifts that someone else in the database—say a board member—helped to bring in?

Systems vary widely in how they support online donations. According to the 2018 Global Trends in Giving report, 60 percent of donors in North America prefer to give online. Key differentiators among systems include the ease of setting up online giving forms, the extent to which you can customize the look and feel of your forms, how the forms interact with your website (does the system provide you with a code that allows you to embed the form in your website, or do you have to link to a donation page on the vendor's site?), and how online donations are added to the database (do they wait in a queue for you to review and approve or are they automatically added to that database?).

Also, as mobile giving becomes increasingly prevalent, it is important to consider whether a system's online donation pages are mobile-optimized.

Finally, what additional information do you need to collect on gift records? Can you enter free-form notes to refer to later or attach a document to a gift record? Can you add in custom fields to collect information not included in standard database fields?

## Constituent Management

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

Can you store all the phone numbers, email addresses, and postal addresses you need, including seasonal addresses (so mailings follow them to summer or winter homes)? Can you clearly mark when someone should not be contacted at all? What if your donors are on Facebook, Twitter, or other social media—can you store their social media handles? Can you see what they are posting online?

Systems vary in how they handle "householding"—tracking multiple people who live together. Some systems make it easy to track information about individuals in a household separately but allow you to store a preferred salutation for letters and send them combined mailings. Others group all the people in a household into a single record and manage them all together, or let you define relationships between separate records. And some require sub-optimal 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? 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—as well as board member relationships with donors.

The initial view of a contact record is important to building donor relationships. When a donor calls, can you quickly see their involvement, giving history, where you got their name, and your record of communicating with them? Does the system automatically record emails and letters sent to donors on contact records? Can your staff log all calls and contacts with donors so staff can see a full history? Can you add emails sent from outside the system to a contact record? Can you filter this list to only show certain types of interactions? 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? Can you easily access it via a mobile device or tablet?

Information is dynamic. Some systems integrate with third-party address update tools to help you keep you donor contact information as up to date as possible. You can also ask donors to submit updates to their information online, either by using contact forms that connect to fields in the database or by providing a self-service donor portal that allows a donor to manage contact and payment information.

Since the majority of systems price subscriptions on the number of contact records, a good duplicate management tool is critical for keeping costs down (and keeping your data clean). Does the system match records by requiring a primary "key" that is unique to all records (i.e. email address)? Or can it highlight potential matches based on several fields in the system (e.g. first name, last name, address, etc.)? Does it flag potential duplicates automatically or do you have to trigger a duplicate checker? How easy is it to merge duplicate records?

As with gift records, most systems will provide you with the flexibility to define custom fields for contact records to collect information not included with standard fields. Some systems group all the custom fields together in one section of the contact record, while others allow you to place custom fields anywhere on the record screen.

Many systems now include some sort of integration with a third-party donor research or wealth-screening tool. These integrations may require a separate subscription, but some vendors have negotiated agreements that allow clients to perform a certain number of profile searches. This data from these tools is captured on the donor record, and some vendors even combine this information with donor interactions in the system to create prospect ratings and donor engagement scores.

## Prospecting and Proposals

Having the ability to build out comprehensive donor profiles is important, as many organizations want to use all this tracking data to develop plans to cultivate donors and deepen relationships. These can range from simple follow-up actions for new donors, such as phone calls, to more complex "moves management" plans for donor relationship development. 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 definitely solicit, a "lapsed" donor that may need a different approach, or an "unlikely" donor—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 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.

Systems vary in their support for automating these workflows. Some will automatically move a donor to the next stage and assign a new set of tasks when the donor reaches a milestone or an activity is completed, while others require you to manually change the stage and assign tasks. 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 tasks or reminders for yourself or others to do something or call someone on a certain date, or even have the system notify you based on certain thresholds reached or changes in the data.

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.

## Communications

From acknowledgment letters and emails to email marketing, text messaging, and social media campaigns, communication is key to fundraising success. You need a system that facilitates the communications most critical to your organization.

Most systems make it easy to create and send thank you letters and emails for gifts and auto-responder emails for online donations. Some provide seamless letter and email creation and mail-merging with built in word processors and email delivery tools. In general, systems include built-in letter and email templates that you can customize or allow you to create new templates that include mail-merge tokens within the system. These templates may only allow limited customization, or they may allow you to add headers, signatures, and custom formatting. A few allow you to create templates in Microsoft Word or Google Docs or build full HTML emails and upload them into the system. There are still some, though, that require you to export data into Microsoft Excel and create your mailings outside the system. Some allow you to create label and envelope templates within the system, but many still require you to create these by exporting address data.

Systems often will 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 you should also check their support for generating one-off thank you letters. 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. You should also check the export formats for letters created in the system—some allow you to export the letters in Word format so you can further personalize the content, while some only export letters as PDFs.

Systems may handle individual email sends differently than bulk (or broadcast) email sends. Individual emails and auto-responders are usually sent through the vendor's server, although some vendors allow you to set up your system so that emails are sent using your organization's DNS information (which is not recommended for bulk email sends). Some systems have built-in broadcast email capability that allows you to send emails to large groups of individuals, such as campaign solicitations or event invitations, while others integrate with third-party broadcast email providers for marketing emails.

This integration can range from a simple upload of a group of contacts to the third-party provider to a two-way integration that allows you to bring in donor unsubscribes and performance data for each email campaign. Systems vary on the type of email performance metrics they track—some provide detailed statistics, while others only record a few (or no) metrics.

It's also important to consider how the system logs the letter or email 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? For emails, will the system also log a recipient's interactions with the message (e.g. opens, clicks) on the contact record?

For both letters and emails, 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).

## Enhancing Social Connections

While social media is nearly ubiquitous in many people's daily lives, nonprofit fundraisers have struggled to figure out how to make the channel work for them. We first added the capture of donor social profiles to our evaluation criteria in the 2017 edition of this report, but since then, several systems have enhanced their functionality around social networking tools significantly.

Salsa wanted to make use of the data it could pull from Facebook, the largest social network, to assist with clients' marketing automation and advertising. As a result, nonprofits on the Salsa Engage platform can use the Facebook Pixel—code that collects data that helps track users—on their donation forms to create retargeted Facebook ad campaigns for individuals who visit a donation page but do not complete a transaction.

Salsa also used Facebook's API to integrate Facebook Lead Ads with Salsa Engage, so that individuals who interact with a Lead Ad are automatically added to the database and entered into a triggered email series.

Other vendors have similar features that help nonprofits use social media for acquisition campaigns. EveryAction includes an integration with Facebook's Ads Manager, which can push a list of contacts directly into a custom audience in Facebook for use in targeted messaging or to create a "lookalike" audience. NationBuilder's Twitter integration allows you to import a Twitter account's followers, or the accounts a Twitter user is following. The system also lets you tag the contacts who engage with your Facebook posts. Virtuous offers an optional "Social Insights" feature that appends social media handles, profiles, and images to contact records.

Nonprofits continue to experiment with ways to integrate social media into their fundraising plans. If your organization is one of those experimenting, you should look into ways your fundraising system can help you do this.

An increasing number of systems now support text messaging, either natively or via a third-party integration. This can range from simple broadcast texts that allow you to send out updates or links to an online form to two-way text messaging that is saved as an interaction on a contact record, or text-to-give or text-to-action functionality that allows a constituent to text a shortcode to a number to receive a link to a mobile-optimized donation or sign up form.

## 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. And 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 selling tickets online, recording RSVPs and attendance, recording basic information like meal preferences, printing out attendee lists or checking people in onsite, taking onsite payments, or even selling assigned seats for a performance.

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

In addition, many of these systems help to manage volunteers—for instance, to track their interests so you can match them with appropriate opportunities, schedule volunteers for shifts, and then track the hours that they put in. Some also allow you to manage a membership program, including multiple member levels, payments, and expiration dates. Some provide peer-to-peer fundraising tools so that you can enable your supporters to solicit donations from their friends on your behalf. 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.

### Engaging Supporters With Video

The written word dominates donor communications for nonprofits, but video is increasing in importance. Network for Good has taken video one step further by incorporating video messaging tools into its platform. These tools allow you to record and send video acknowledgements, personal video messages, and group video messages to donors.

The recipient will receive a text message or email with a preview image that contains a personal message and a link to the video. After watching the video, the recipient can like it and add a comment. The system is set up to encourage the use of video messaging, so once you send one video you will receive suggestion of what video to send next. Some of the suggestions include birthday messages, "donor-versaries," and donors who are in danger of lapsing.

## Payments and Accounting

Accepting credit card payments or bank transfers through your system requires a payment gateway (and merchant account). The systems we evaluated vary greatly in how they support these needs.

Some vendors integrate with several payment processors, while others have their own custom solutions. Fees vary by processor and are generally charged on a per transaction basis, and some vendors charge an additional per-transaction fee in addition to processor fees. Many systems allow you to add a checkbox to online donation forms that gives donors the option to cover the processing costs for their gift, which can help defray some of those costs.

In addition to asking about processing fees, there are additional questions you should ask about payment processing. Can you set up an automatic process for charging cards on a recurring basis? Does the system store credit card numbers in the database? If so, ask about how they protect credit card data and make sure that the system is PCI compliant at a minimum.

Some vendors that allow you to choose from several payment processors will also allow you to connect multiple payment processors to the system for different types of transactions. This can be a benefit for adding quick payment solutions, such as Apple Pay, to your donation forms or for accepting onsite payment at events. In addition, different processors provide different services—in some systems you may need to select a specific processor if you want to accept recurring donations or if you want to automatically update expiring credit cards in the system. Finally, what happens if someone asks for a refund? Some systems will require you to use a different interface to make a refund, and then log the refund separately into the system.

Because donor management systems track incoming money, it's critical to be able to easily sync transactions 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?

Nonprofits vary in the ways they reconcile donations with accounting. Some group a bunch of donations together into a single entry in their general ledger. Others (usually smaller nonprofits) prefer that each transaction be entered individually.

> ***Because donor management systems track incoming money, it's critical to be able to easily sync them with your accounting system.***

Many systems support the idea of a "batch" of donations—a set of payments for a particular time frame 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 to which it is assigned 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.

Having a donor management system that speaks directly to your accounting system can come in handy. A number that we reviewed offer pre-built integrations with common accounting systems. But every system has the ability to export transactions, and vendors will often work with clients during implementation to create a custom report that will export transactions with the information the finance department needs (and, in some systems, you can schedule that report to run automatically and be sent directly to the accounting team). In fact, some organizations prefer the control that a more manual process allows compared to an automated process.

## Search, Queries, and Reporting

Easy access to information in the system rests largely on the effectiveness of the search function, the query builder, and the reporting tools.

Some systems provide a global search available across all modules that will index and search numerous system fields. Each module (contacts, donations, reports, etc.) usually has a quick search as well to help locate information contained in those record types.

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 nontechnical users, either by using a visual approach to query building or by providing a step-by-step query building wizard. Several systems in this report now allow you to view the results of their queries as you set up the conditions, and as you add or refine your query, this list will update dynamically, allowing you make sure that you have the list you need.

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). 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. Since queries are the basis for segmented lists of donors, saved queries are a way for nonprofits to create groups of donors that update dynamically. Some systems merge querying functionality with reporting and ask you to start your reporting process at the same time.

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. Vendors will often help clients build several custom reports during implementation, if needed.

Think about what reports your organization needs, and which you'll regularly use. Comparing fundraising totals over time is common, but what about comparing multiple campaigns, comparing demographic groups, or reporting on your pledge pipeline? If you usually provide a year-end giving summary to your donors, some systems will allow you to easily generate this report and send it out, which can take weeks to pull together in other systems.

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 that don't apply to your work 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. 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.

Most systems now provide some type of "dashboard" interface to display and access frequently used reports, graphs, or charts showing important metrics about your fundraising performance. In some systems, the dashboard may be pre-configured with particular reports, charts, or task lists, and users may have some ability to hide particular items that aren't relevant to their work. More robust systems may allow users to fully tailor the dashboard to their needs by adding desired standard or custom reports or new charts or graphs. A few systems even allow you to set up specific dashboards by user role, letting you have different information displayed for a major gift solicitor and your executive director, for example.

## Integrations

Integrations are a popular way for vendors and nonprofits to extend the functionality of a fundraising system. Many vendors offer a variety of pre-built integrations with third-party tools, such as software for accounting, email marketing, peer-to-peer fundraising, wealth screening, text messaging, and more. In many cases the vendors offer these integrations at no additional cost, but you will often have to pay subscription or package fees to the third-party vendor to use their services. If a vendor offers an integration for a function that is important to your organization, be sure to ask about additional costs, as well as whether it is a one-way (you send your data to the third-party system and use it there) or two-way (you send your data to the third-party system and can update records in your fundraising system with the results). Some systems offer an app store: a searchable set of apps, modules, or extensions built by third-party vendors that work with the database.

If you want to integrate your fundraising system data with another online tool—and manual imports and exports will be too 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. Most systems will provide an API (or multiple APIs). If your vendor does provide an API, you need to find out what data can be accessed and whether it is read-only or if you can write to the database. One area of caution regarding custom integrations: if an integration is not created by the vendor, you are at risk of having the connection stop working if a vendor makes changes to the API during an upgrade.

## Security, Customization, and Configuration

Recent high-profile incidents have served to emphasize the importance of security for any system that stores personal or sensitive information about individuals and organizations. Fundraising systems are a particularly appealing target for hackers due to the extensive donor profile and contact information and financial and credit card/bank account data storage.

Security begins with the login process. At the very least, the system you select should have password complexity requirements, such as requiring a certain number of characters and a mix of characters, numbers, and symbols. More secure systems will allow you to turn on two-step verification or Multi-Factor Authentication (MFA) for logins to require users to enter a code that is texted or emailed to them. A few

> ***Fundraising systems are a particularly appealing target for hackers due to the extensive donor profile and contact information and financial and credit card/bank account data storage.***

systems allow Single Sign On (SSO) so that users can be authenticated with the credentials they use to access their organization's network. You should also ask if the system automatically logs users off after a period of inactivity.

How does the system handle data encryption? Does it encrypt data at rest and/or in transit? Are credit card numbers stored in the system or are they tokenized and stored in a PCI-compliant vault. How often do system backups run?

It's also important to think through who has access to different types of data in your system. Most systems allow you to control access to certain fields and features based on different user roles. Some systems have a limited number of user roles that correspond to certain types of tasks or access to specific modules that you can assign to staff in your organization. Others support a larger number of roles that allow a more granular level of control over update, view, and delete rights for modules. Some even allow you to define rights for individual data fields.

The donor data contained within the system belongs to you. Being able to extract it from the system is critical in order to back it up—which is always a good idea—or migrate it to a new system. Almost all of the systems in this guide allow you to freely export data, but it doesn't hurt to make sure. Most also allow you to easily import data, but check to see if there are additional costs to do so.

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—those choices then show up in dropdown boxes throughout the system. A few systems let users move or hide navigation menu items or certain views throughout the system.

But few systems let you move, remove, or change the names of default fields, and vary substantially in their ability to let you add new ones. Some let you add only a specific limited number of new fields, others don't let you add any at all, while still others allow unlimited new fields—or even let you customize them further to allow unique-to-your-organization constituent interactions. Check to see where your new fields will be displayed in the interface—often they must go into a limited "custom field" area, which can become disorganized and awkward if you add a number of fields.

A few systems can be almost completely customized to your needs—either by you or the vendor—with custom fields, labels, interfaces, processes, and functionality. For instance, because CiviCRM's open source system lets you access the underlying source code, an experienced programmer can make nearly limitless changes. This 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. It might be more effective to change your process than to customize a system around it.

You should also ask vendors about accessibility features for users with disabilities. This is often not a priority in system development, but can be tremendously important to individuals in your organization and constituencies served by your nonprofit. The most common accessibility standards for web developers are WCAG 2.0 and WCAG 2.1, but even such measures as compatibility with screen readers and use of contrasting colors can make a big difference.

Finally, if you have fundraising staff who often meet with potential donors away from the office, ask how the system functions on mobile devices or whether there is a mobile app available. This is also helpful if you want to use the system to check attendees in at events or to collect onsite registrations and donations.

## 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—email 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? Is support only available during certain days or hours? Is there an emergency support option if something goes wrong outside existing support hours? 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. If you're going to widely roll out a system, can you tailor the documentation to your own processes?

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? Most vendors also offer frequent free webinars covering system releases and fundraising best practices.

A few vendors have created a customer community or forum to allow customers to interact with each other and ask questions, while others provide customers with the ability to suggest new features and vote on suggestions. Make sure you find one that meets the level of customer support you're likely to need.

## 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.

How long have they been in business? How many clients do they have, and how many staff members?

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.

# HOW TO SELECT THE SYSTEM THAT'S RIGHT FOR YOU ▶▶▶

So, which of the 23 systems featured in this report is the best? As we've said elsewhere, there is no best—each has its particular strengths, and each aligns with at least one typical use case for a nonprofit fundraiser.

That's great news for organizations looking for a system that meets a specific set of needs. But it makes it complicated to try to understand the market and sift through the available options. Not every system is right for every nonprofit, but there is likely at least one in this guide that is a good fit for yours.

To help you determine which may best meet your needs, we defined a set of use cases, or scenarios,  that cover a number of different typical nonprofit scenarios and identified the systems that, in our opinion, fit each one.

But keep in mind the following things:

- Each system may be appropriate for more than one use case.
- All of the systems we've listed under each use case will meet the needs of similar organizations, not just the one we've called out with a longer review.
- Your own organization's use case may relate to more than one of those we've identified here, or none at all—look through them all to find the ones that most resonate for you.

Every system included in this report has solid donor management functionality. Every system allows you to create a variety of forms and collect online donations. Every system is cloud-based. In addition, every system costs less than $10,000 to implement and run in the first year. That's what they have in common—the use cases we've identified focus more on areas where you see some differentiation among the systems.

Once you've identified a use case that most closely correlates to your own, revisit the previous section *(What Do these Systems Do?)* and begin pulling together a list of functions that address your current needs and pain points. Work with colleagues who will also use the system to sort these functions into high, medium, and low priorities so that you have a framework for what to look for in a system.

Armed with your prioritized list of features and a list of recommended systems that may best fit your needs, flip to our *Index of Low-Cost Fundraising Software* beginning on page 23 to learn more about the systems we evaluated.

Remember, this guide is not meant to replace your software selection process—it's only meant to facilitate it. Be sure to conduct your own due diligence, including reaching out to peers at similar organizations to ask what systems they are using and if they have any recommendations. If you attend industry conferences—most likely virtually, for the time being—seek out roundtables and workshops on fundraising tools or talk to vendors about the strengths and limitations of their systems.

If you are new to software selection, consider starting with online resources that walk you through the process and showcase best practices, such as Tech Impact Idealware's three-part online course, *Software Selection for Nonprofits*, or Build Consulting's *10 Tips for Selecting Nonprofit Software, Systems, or Platforms*.

Alternately, if you have the budget, consider hiring a consulting firm who can assist your nonprofit with software selection and work with you to find the best system for your organization.

# INDEX OF LOW-COST FUNDRAISING SOFTWARE ▶▶▶

## @EASE Fund Development Software, by Batsch Group, Inc.

**www.raisefundswithease.guru/**

@Ease is a system built on Microsoft Azure that can be either cloud-based or installed on individual workstations and tablets. With an interface that will feel very familiar to Microsoft product users, the software provides a streamlined approach to managing a fundraising program.

The system tracks individual donors and corporate/organizational donors in separate sections, with the ability to collect a good amount of information for both types of constituents. You can track up to two addresses, four phone numbers, and two emails for individual donors (or twice that number if you designate two individuals in a couple using the "significant other" functionality) and multiple office addresses for corporate contacts. The system does not provide householding, but the significant other function links the profiles of up to two household members for a shared donor summary and it can track other relationships, as well as company employees. All constituent interactions can be logged in "Dickens," the system's contact manager, which provides the ability to track conversations with donors and can also sync with an organization's Google Calendar to manage reminders, calls, and meetings.

The system supports volunteer interest and volunteer credential tracking and some event registration and management functions. Campaigns are set up based on fiscal years and are further categorized with campaign types and campaign codes. The pledge module is used for both pledges and recurring gifts. iATS payment processing allows PCI-compliant storage of account numbers for credit cards and EFT monthly donations, which are run automatically each month.

Online donation forms (as well as other types of online forms) can be embedded on your website and the system compares records for possible duplicates when you import donations. You can send receipts in a variety of formats: e-receipts, PDF receipts, and printed receipts. Email receipts are sent through your server via SMTP. An integration allows you to easily send lists to Constant Contact for bulk email sends.

No specialized knowledge is required to run reports or queries. The system comes with a number of canned reports that can be viewed as tables, graphs, or charts. Vendor-created queries can be used to do bulk operations and export data for use in other systems. You are not able to create custom queries or reports, but the vendor will do so on request for no additional cost and the vendor implements all client requests for queries into the software for other clients to use as well.

An import tool automatically runs duplicate checks and alerts you to possible duplicates. The software includes robust help tools and training resources. The built-in Knowledge Management System organizes information by function and provides quick access to any information, such as a rich tutorial area with guidelines and how-to guides. Training opportunities are offered throughout the year.

Rather than using a subscription model, clients purchase the system for $11,000, which allows for five users and unlimited records. Batsch Group offers a lease-to-purchase option for approximately $430 per month over a three-year period, after which the only cost would be for a support agreement.

Additional licenses are $400 per person and the annual support contract is $2,100 per year. This pricing includes Microsoft Azure set up and the Donate Now online fundraising solution, as well as data management consulting services via the support contract.

## Blackbaud Raiser's Edge NXT

### www.blackbaud.com/products/blackbaud-raisers-edge-nxt

Blackbaud Raiser's Edge NXT provides fundraisers with an all-in-one solution that provides solid support for all aspects of a fundraising program, including online, offline, and multichannel campaigns; email marketing; gift processing; events management; grant tracking; major gift cultivation; and peer-to-peer fundraising. In addition to all of these features that are included in the vendor's base package, you can also add on optional components for volunteer management, prospect research, or advanced wealth insights for an additional fee.

Each user's personal "Work Center" page helps them manage the relationships assigned to them. The prominent "Needs Attention" area uses Artificial Intelligence (AI) to identify people in users' portfolios who may be at risk of lapsing or who have an upcoming personal event or milestone and provides recommended next steps, which can easily be converted to tasks for follow up. A more traditional dashboard of Key Performance Indicators (KPIs) is accessed in the Reports module, and includes charts that allow you to drill down to access the underlying data, filter to get more granular data, send out by email, and download as a PDF or .CSV.

Individual campaigns in the system have their own dashboards with key metrics, and the system also includes numerous canned reports. Constituent records provide a holistic view of all constituent data and interactions, with multiple addresses (including seasonal addresses with dates), multiple emails and phone numbers, social media profile links, relationships, and householding.

Data enrichment services that are included with all subscriptions provide a quarterly NCOA scan against the entire database and a yearly email and phone finder scan to populate missing information. Donor ratings are also included with a subscription, bringing in Target Analytics Affluence data on wealth assets, suggested donor type, and minimum next ask amount for all individual supporters as they are added to the system.

Outlook and Gmail add-ins allow you to save emails sent from outside the system into constituent records and sync upcoming activities with your calendar. Gift Management tools enable automatic processing of recurring gifts—including automated retries—for constituents according to pre-defined schedules. The system allows you to quickly enter large batches of gifts and tag them with gift type and subtype codes; appeal, package, and campaign attributes; connect to a fund; specify the acknowledgement letter; and add comments.

Online gifts are not automatically added to the database, but rather held in a queue for administrative review and approval. The built-in email marketing tool includes a variety of pre-built templates, or you can start with a blank email and build your message using a drag-and-drop designer. You can track performance metrics for email campaigns and interactions with emails are saved on constituent records. A workflow designer allows you to build automated tasks or triggered emails with a step-by-step process.

Pricing for The Raiser's Edge NXT starts at $5,600 per year; specific pricing for an organization requires a custom quote from the vendor.

## Bloomerang

### Bloomerang.co

Bloomerang's focus on donor retention is evident as soon as you log in to the system. With a prominent donor retention graphic on the dashboard, automated first-time donor call task assignments, and an engagement level meter on each constituent profile page, the system provides clear metrics, visual indicators, and actions that help a nonprofit cultivate repeat donors.

The system includes free nightly NCOA updates for address and deceased status changes. An integration with DonorSearch displays a constituent's "generosity score" and users with a DonorSearch subscription can click through to the site for more detailed information.

The process for entering donations into the software is straightforward, and gifts can be associated with funds, campaigns, and appeals. The system includes a robust pledge module that allows you to create and customize a payment schedule and also prompts you to apply a gift to an open pledge when entering gifts. Recurring donations are supported as well. Web form templates make it easy to bring data into the system and a variety of integrations extend the system's functionality, facilitating such activities as text-to-donate, peer-to-peer fundraising, and donor portals. Emails can be sent from the vendor's servers (with interactions recorded on constituent records) or via an integration with MailChimp. An API allows customers to develop custom integrations as well.

Reports can be built from scratch or users can access a variety of canned reports included with the system, which can also be modified and saved for future use but cannot be added to a "favorites" list. A recent update allows users to schedule reports to run on a certain date or at a specified interval and be delivered by email.

Pricing begins at 1,000 records and 5,000 emails per month for $1,188 per year. A version for up to 25,000 records and 125,000 emails per month costs $4,788 per year. All versions allow unlimited online giving pages/forms, an unlimited number of users, and free email/chat support and group training. Unlimited personal support is available for an extra charge. There is no setup cost for new customers who import their own data using the system's import tool, but customers also have the option to purchase a custom implementation package that is priced based on the complexity of data being imported.

## CharityEngine

### www.charityengine.net

CharityEngine is a cleanly-designed donor CRM and fundraising system that provides robust functionality and features that help make the system more approachable for non-technical users. The dashboard is arranged around a prominent search bar that poses the question "What would you like to do today?" where users type an action to pull up a list of related pages. The system is color-coded by section, and the color theme changes as you move from section to section.

The system supports a variety of gift types, including tribute gifts, pledges, and recurring donations. There is a particular focus on sustainer giving, including a pre-built communications series for sustainers with declined transactions, an automatic credit card updater for expiring credit cards, and a sustainer reactivation form.

A form creation wizard walks you through a screen-by-screen process for creating several different types of forms. The system includes a robust automation tool that allows you set up triggered email sends and series, auto-create task assignments based on triggers, and update records based on specific criteria. The system also supports broadcast text messaging.

The events module is particularly robust, allowing you to create events, collect registrations online, sell a variety of tickets (including multiple sessions within an event), manage a waitlist, assign tables and seating, manage guests, connect an event to a peer-to-peer fundraising campaign, manage volunteer assignments, and check attendees in onsite. CharityEngine also includes the ability to manage membership and volunteers.

The base implementation price for a smaller organization is generally in the range of $4,000–5,000 and includes system setup, customer training and education, and a basic data import. Implementation costs increase for more complex data migration.

Subscription pricing is based on the features and functionality selected, the number of contact records, and the number of outbound emails allotted per month, and generally starts at about $4,188 per year.

## CiviCRM

### civicrm.org

CiviCRM is an open source web-based platform that helps nonprofit organizations organize constituent information, handle donations and memberships, and engage communities. You can download and deploy the code for the system inside one of four open source web content management systems: Drupal, WordPress, Joomla, or Backdrop. It's free to use, and the code is free to study and share.

The platform is built around the core CRM functionality, which means that contact records are the hub of all functionality. The system is modular and includes a variety of components and extensions that you can enable and add as desired. Components deliver major features: CiviContribute handles donations, CiviMail manages bulk email sends, CiviEvent offers registration and event management, CiviCampaign tracks progress toward goals across several component modules, and CiviVolunteer assists with volunteer tracking and scheduling. Other modules assist with grants, advocacy, and case management. Extensions enhance functionality, but more narrowly than components. For example, CiviRules provides automation capability for tasks such as record updates and triggered emails.

The components themselves, with proper configuration, provide solid support for most donor management and fundraising efforts. You can collect and manage a variety of gift types, including pledges, recurring donations, tribute gifts, in-kind donations, and more. You can manage letter, email, and text message communications; set up and mange events and membership programs; schedule and track volunteers; and build reports that provide insight into your supporters and the performance of your fundraising programs.

While there's no fee for the CiviCRM platform, the system does require an open source web CMS. Technical expertise—either in-house or provided by consultants—is necessary to install and configure the system properly. You will need to set up an account with one or more payment processors in order to accept credit card and ACH transactions (which are necessary for online donations). There is extensive documentation of the system and components available online, but any training and support needs to be provided by a consultant with system expertise. If you need technical assistance with the system, CiviCRM.org maintains a list of partners that provide consulting, development, or hosting services.

## DonorPerfect, by SofterWare

### www.donorperfect.com

With strong donor management functionality, the ability to support multichannel campaigns, and numerous features that help non-technical users navigate the system, DonorPerfect has elements that appeal to both new users and power users. From a welcome screen that provides a comprehensive system tutorial to a "Walk Me Through" button that provides contextual help for each page of the system to its numerous tool tips and contextual help links, DonorPerfect makes it easy for non-technical users to get the help and context they need to accomplish key tasks. Power users can create and work with donor segments, create automated workflows with the system's "Smart Action" tool, and save and schedule custom reports that allow them to work with the data they need.

Contact records allow you to enter multiple addresses, including seasonal addresses with dates that you can use for mailings. While you can define relationships between constituents, the system does not include a householding feature. An integration with DonorSearch allows you to pull in wealth data and prospect ratings for constituents in the system. The system includes a large variety of online form templates for donations, sign ups and surveys, different types of events, and memberships. Forms can be customized with a built-in form styler (or by editing the form's CSS) and can be embedded on your website or standalone.

A robust event tracking tool allows you to accept online registrations, manage registrants and guests, and manage tables at galas. You can accept online payments using the system's mobile app and a credit card swiper. The system also includes native tools for volunteer tracking, memberships, and crowdfunding. Integrations with both QuickBooks Desktop and QuickBooks Online help streamline accounting processes. A marketplace featuring numerous integrations and an open API allow you to further extend the functionality of the system, but many of the integrations require additional subscriptions.

New clients can take advantage of a hands-on implementation process that starts with a needs analysis to identify how best to set up screens and customize the system.

Pricing for the system is based on the number of contact records and is divided into five packages; all packages include unlimited users and web chat support. An organization with 1,000 contacts using the "Lite" package can expect to pay $1,068 per year, while an organization with 20,000 contacts using their "Premier" package would pay $5,748 per year.

## DonorSnap

### www.donorsnap.com

DonorSnap is a user-friendly cloud-based system that provides a variety of tools to help manage and communicate with donors and facilitate fundraising programs.

Each user within an organization has the ability to customize their dashboard by adding or removing apps, changing their position on the page, and choosing background and font colors for each app. Users can also select which fields appear in the summary section at the top of constituent records.

Constituent records can include multiple addresses (including seasonal addresses), relationships and households, volunteer information, and document attachments.

A National Change Of Address (NCOA) integration ensures that addresses are kept up to date. All system-generated emails and letters are recorded as interactions on the recipient's record. The system supports a variety of gift types, including pledges, recurring gifts, in-kind gifts, and honor/memory giving.

Manually entering multiple gifts in bulk is accomplished through a straightforward and useful interface. Online donations are supported through mobile-responsive forms, but you will need an account with goEmerchant to process those donations. Information and donations submitted through online forms are held in a queue for you to review and approve, and the system automatically checks for and flags potential duplicates.

The Automated Task Manager allows you to set up automated email series for a variety of situations, such as birthday messages, welcome series, and membership management emails. Individual and bulk emails are sent through the system, but DonorSnap also has an integration with Constant Contact for email marketing. Emails sent through the system are tracked to show opens, deliveries, bounces, clicks, and unsubscribes. In addition, the system supports text messaging campaigns. Users can create letters individually or generate them in batch and export them as PDF or Microsoft Word files.

You can build queries using any field in the system and export the results or use them for batch operations. The system includes a variety of canned reports that you can run or make changes to and save as a custom report. You can schedule reports to run in the future or at certain times and have the results emailed to individuals.

Pricing is based on the number of contacts in the system, with households counting as one contact for the purposes of pricing, and includes unlimited email support (phone support plans are available for an additional fee). All new clients pay a $200 site setup fee, which includes setup, four hours of data conversation, and private training. Pricing begins at $450 per year for up to 1,000 contacts. An organization with 20,000 contacts could expect to pay $2,270 per year.

## Eleo, by Community Software Solutions

### eleoonline.com

Eleo is an affordable donor management software solution focused on meeting the needs of small nonprofits and providing comprehensive training and support to clients. The system provides solid donor management and online fundraising support with a variety of modules that help nonprofits manage constituents, donor giving history, events, membership, volunteers, and grant proposals.

Constituent profiles allow you to track multiple addresses, communications preferences, and other donor data, such as social media profiles. While Eleo does not include household functionality, it lets you add a spouse name and track other relationships within the system. Constituent interactions are color-coded and can be filtered by type, but transaction-related interactions are held on a separate tab.

The system supports a variety of gift types, including tributes, in-kind donations, and stock gifts. A pledge module allows you to create and customize a payment schedule and add a credit card to a pledge. Online donation forms have a variety of customization options and you can also add the option to allow donors to cover processing fees. The system integrates with two payment processors: Stripe and Braintree.

Acknowledgement letters and emails can be sent individually or held in batches and marketing emails are sent via an integration with Constant Contact or MailChimp.

Eleo includes a basic query builder and numerous canned reports, as well as a custom report builder. Reports can be exported, saved, and marked as favorites, but cannot be scheduled. You can set up a report to format transactions for export to accounting systems, and the system integrates with QuickBooks online for a seamless transfer.

All packages include unlimited live phone and email support, with a one-ring standard for phone calls and email responses in less than 24 hours. The vendor provides unlimited personalized training for all users, regular webinars, and a robust knowledge base that even includes a glossary of terms. In-system help is available for every page, and the customer can customize these help screens with their own best practices.

Pricing is based on the number of donor records in the database and includes all modules, unlimited users, and unlimited support and training. An organization with 1,000 contacts can expect to pay $468 per year for the system, while an organization with 20,000 contacts can expect to pay $2,388 per year.

## eTapestry, by Blackbaud

### www.blackbaud.com/products/blackbaud-etapestry

Blackbaud's eTapestry product continues to focus on delivering a flexible integrated donor management and online fundraising solution to its core market of small to mid-sized nonprofits. A customizable widget-based dashboard provides a snapshot of your fundraising performance that you can use to drill down to the underlying data, as well as links to your favorite reports. Users can also customize their contact records page layout, turning modules on and off as needed and rearranging elements on their screen.

A variety of user-defined field sets allow you to extend the types of information and actions the system supports. Contact records include support for multiple addresses (including seasonal addresses with dates), relationships, and householding. The Journal function provides a timeline of all interactions with the contact, and you can filter these interactions by type of action or time frame.

Peer-to-peer fundraising is available via an integration with JustGiving, and this can also be used for virtual events. You can create a variety of online forms, including donation, contact information, volunteer information and hour submission, event registration and ticket sales, and membership payments. Transactions are processed using Blackbaud Merchant Services, which charges 2.79 percent plus $0.26 per credit card transaction and a flat fee of $0.75 for each ACH transaction.

Emails can be sent either in "basic" or "advanced" format, with the latter providing access to performance metrics. A step-by-step query builder walks you through the process of creating queries using clear language and also allows you to nest queries for compound segmentation. The system also includes numerous pre-packaged reports, standard accounting report templates for exports to 11 frequently used accounting systems, and a pre-built report to export annual receipts for all donors.

Implementation includes three two-hour onboarding sessions to configure the system and set up the basics. Tool tips are available throughout the system and access to chat support is included in the monthly fee.

System pricing is based on the number of constituent records in the system and includes unlimited users. Pricing begins at $1,188 for nonprofits with up to 1,000 contacts; organizations with larger databases need to contact the vendor for a custom quote.

## EveryAction

### everyaction.com

Since the last edition of the Consumers Guide, EveryAction has added a host of new functionality aimed at strengthening its position in the marketplace of systems for growing nonprofits. Today, the system brings together strong constituent management and reporting tools with automated workflow features and helpful functionality to help nonprofits manage complex membership programs and grant applications. In broadening its core functionality, however, the system packs a lot of information onto each screen, making it a little more daunting to individuals less comfortable with technology.

The system has much to offer organizations looking to expand beyond basic donor management and donation tracking. Multichannel campaign management and reporting allows you to export donor lists to any channel and track your fundraising performance across campaigns to determine which channels and packages are performing best. Pre-built reports allow you to dive deep into your data. Nonprofits that are looking to expand digital advertising will appreciate the system's social matching capability and integration with Facebook's Ads Manager. Smaller nonprofits can make use of the system's recurring lightbox upsell that asks donors if they would like to convert their one-time gift into a sustainer gift.

An automated workflow builder with a visual interface helps you create triggered messaging campaigns, such as a welcome series, and moves management plans to cultivate donors. A grant application management workflow with status tracking and automated task assignment is built into organization records. A straightforward query builder allows you to develop a list using virtually any field in the database and shows you the running total of results as you add new filters and save the results as a static or dynamic list.

The base package for the system includes donor management, online fundraising, basic advocacy, and basic volunteer management. It also includes free phone and email support.

Pricing is based on the number of contacts in the database and includes an unlimited number of users. New customers can use their self-service onboarding tools for free or can opt for a $1,500 "Getting Started" package that includes training and data migration. Yearly pricing for the base package starts at $1,308 for organizations with up to 1,000 contact records. Organizations with 20,000 contact records can expect to pay $5,388 per year for the base package.

## ExceedFurther, by Arreva

### www.arreva.com/software#ef

ExceedFurther by Arreva is a cloud-based, holistic donor relationship management and online fundraising system. A great deal has changed since the 2017 Consumers Guide, in which we profiled systems from Telosa Software, DonorCommunity, and MatchMaker FundRaising: DonorCommunity merged with Telosa to create Arreva, and the new entity acquired MatchMaker FundRaising as well as virtual auction management tool MaestroSoft. The result is a flexible, modular system that offers a great deal of functionality to a variety of nonprofits.

The core system provides robust donor relationship management and online fundraising capability. Contact records are built around households or organizations, and can contain as many people within those records as needed. While each household or organization has a primary record, which can be an individual or couple, you can track a variety of information and attributes about all of the individuals associated with the household or organization. You can set the mailing preferences (for email or postal mail) for a household, and when it comes time to generate acknowledgement emails and letters, the system will automatically generate each recipient's preferred type of correspondence.

The system supports a wide variety of gift types, including a robust tribute function that allows you to split tribute gifts and notify as many people as you wish about a gift. You can customize all data entry screens, create a virtually unlimited number of custom fields, remove fields, and move fields around to display in any order you wish. You also have the ability to create an unlimited number of online donation pages—online donations are automatically matched to existing records and are held in a staging area for approval and processing. Text-based giving is enabled via an integration with Arreva's Text2Fund software.

Arreva provides its own payment processing solution, but also works with a variety of third-party solutions, including Stripe, IATS, Intellipay, and Authorize.net. You can generate a variety of queries using the system's Quick Lists and apply filters, sort, export, and perform bulk actions on the results. The software includes numerous pre-built reports that you can customize. While you can save reports to favorites, you are not able to schedule them to run in the future.

Add-on modules that extend functionality include Peer-to-Peer Fundraising, Membership, Campaign (donor cultivation), Events, Volunteers, Grants, and Guests (hospitality management). The core software and each module have their own dashboards with widgets that users can customize and re-arrange. The platform includes pre-built integrations with both QuickBooks Online and Desktop, and you can also export transactions to a variety of other accounting systems. You can send broadcast emails via integrations with MailChimp, Vertical Response, or Constant Contact, and while you can view email campaign results within the system, you need to click a button to add interactions for sent emails to constituent records.

Pricing for the system is based on the number of household/organization records in your database and begins at $1,548 per year for a "Lite" version of the core software. An organization with 1,000 constituents can expect to pay $1,548 per year for the core system, while an organization with 20,000 constituents can expect to pay $12,600 per year. Add-on modules range from $420 to $900 per year.

## Keela

### keela.co

With a clean design and a straightforward, easy-to-use interface, Keela provides donor management and online fundraising tools that are accessible to less tech savvy nonprofit staff. An Insights tool provides a donor engagement score and a "Smart Ask" amount that you can use in communications with the donor and on donation forms. The system supports both pledges and recurring donations, and recurring donors are automatically emailed a receipt at the end of the year that summarizes their giving.

The system is primarily focused on facilitating online communication and giving. While you can create PDF donation receipt templates in the system, all other offline communication is conducted outside the system. You would have to manually create an interaction and attach a letter to that interaction to store it in the database, but the system does provide the ability to do this in bulk for a list of individuals. You can create and send emails within the system using an email tool that features a user-friendly drag-and-drop editor, and those emails are recorded as interactions on constituent records.

There are a number of frequently used pre-built reports in the system that include graphs and charts to display data visually and the system also includes a custom report builder that allows you to create and save your own reports.

The system integrates with Stripe and PayPal for payment processing. It also includes an integration with QuickBooks Online for accounting, and users of other accounting systems can export transaction reports. An integration with Eventbrite allows you to import events created and managed in their system into your database. The system does include the ability to manage membership programs and track volunteer interests and hours.

Clients receive access to the system's knowledgebase, which includes a variety of training videos and information, as well as unlimited email support.

Pricing is based on the number of contacts in the system and includes all modules and integrations, as well as an unlimited number of users, beginning at $588 per year. A nonprofit with 1,000 contacts can expect to pay $1,068 per year, whereas one with 20,000 contacts would pay $4,788 per year.

## Kindful

### kindful.com

Kindful combines a clean, approachable design with solid donor management and online fundraising capabilities, a user-friendly reporting tool, and numerous pre-built integrations. There are some limitations to help maintain the simplicity of the system. A dashboard provides a snapshot of donor and fundraising performance, but it cannot be customized by users. By default, contact records can only track one mailing address (although you can add custom fields to capture additional addresses). Contacts can be added to groups—while you can create as many groups as you want, the system only supports static groups at this time. The system supports pledges, but they can only be saved with a single due date—you cannot create an installment schedule unless you set it up as multiple pledges, but individual payments can be applied to a pledge or a recurring transaction can be set up to apply to a single pledge.

You can send marketing emails via an integration with either MailChimp, Constant Contact, or Emma, and bring performance metrics back into the system to be logged on contact records. The system integrates with Stripe, Authorize.net, and PayPal for online transactions, or you can choose to use Kindful Payments, which charges 2.9 percent plus $0.30 per transaction for credit cards and 1 percent plus $0.30 per transaction for ACH payments. Kindful Payments does include a service that automatically updates expiring credit cards in the system, which helps avoid payment failures for recurring transactions.

More than 45 integrations are available to extend the functionality of the system. There are no additional fees to add any integrations to your account, other than subscription fees for your Kindful account and any subscription fees for the third-party system. In addition, Kindful provides an open API that allows developers to create custom integrations.

The initial implementation fee for new clients is $199, and you have the opportunity to select either a full onboarding package to assist with data migration or a training package. Subscription pricing is based on the number of contacts in the system and includes unlimited users, unlimited donation pages, and unlimited phone and email support. Pricing starts at $1,200 per year for systems with up to 1,000 contacts. Organizations with 20,000 contacts can expect to pay $4,800 per year.

## Little Green Light

**www.littlegreenlight.com**

Little Green Light provides nonprofits with solid donor management and online fundraising tools in an affordable package. Entering gifts is straightforward, with both a single gift and bulk gift entry forms. You can create pledges in the system but recurring gifts need to be entered using one of your online donation forms. The gifts will process automatically via the payment processor at the specified intervals, but you will need to manually access reports on expiring credit cards and ask donors to update their information.

Constituent profiles are neatly laid out in sections that you can expand or collapse, and include a color-coded, searchable timeline of all interactions. Little Green Light includes an integration with DonorSearch (which requires an additional subscription) that allows you to import wealth data and prospect ratings into constituent records. You can batch and send letter and email acknowledgements through the system. While you can send emails natively through the system, the vendor recommends using its integration with either Constant Contact or MailChimp for large broadcast sends.

A widget-based dashboard provides access to key metrics and reports and you can drill down to access detailed data. The system includes a query builder, a number of pre-built reports, and a custom report builder, and you can export query results and reports. A native event management module allows you to track registrations, guests, and table assignments, and the system also includes basic volunteer and membership management tools. The system integrates with three payment processors—Stripe, PayPal, and ProPay—and Little Green Light charges an additional 1 percent processing fee per transaction (capped at $50 per month) on top of payment processor fees. Additional third-party integrations are available with WuFoo, Fundraising Report Card, Zapier, and others.

System implementation for new clients is primarily self-service, but Little Green Light provides a library of training videos, regular Q&A webinars, and documentation, as well as email support for all clients. There is also a private Facebook group for system users to connect and share questions and best practices and an external LGL Consultant Network for fee-based support.

Pricing is based on the number of contact records in the database and includes unlimited users. An organization with 1,000 contacts could expect to pay $421 per year (plus up to $600 in transaction fees), while an organization with 20,000 contacts could expect to pay $745 per year (plus up to $600 in transaction fees).

## NationBuilder

### nationbuilder.com

NationBuilder is a cloud-based CRM and fundraising tool with a focus on online constituent engagement and action. Individuals are placed on and move along paths that correspond to how the constituent interacts with an organization, with clearly identified next steps and an assigned "point person" responsible for the relationship.

Online donation and engagement pages are all designed to encourage taking action, and an organization can daisy-chain pages into a logical series of actions. Users can also assign "social capital" points to constituents for various actions to measure engagement.

The paths assigned to constituents are the primary focus of their records, with additional address and biographical information located in tabs. The system allows both individual organization records, with organizations also connected to paths. Individuals can also be connected with other constituents and organizations in the database via relationships. NationBuilder captures basic contact and biographical information, which can be extended via custom fields (available for Pro plan subscribers at an additional cost).

A Twitter integration allows users to import constituents' Twitter followers or accounts they are following for acquisition purposes. In your database, you can also tag constituents who interact with your Facebook and Twitter posts to understand who engages with your social media content. The system allows you to broadcast emails, texts, and Facebook and Twitter messages, but does not include the ability to generate letters. It is easy to set up automated email series, but automations require a Pro plan subscription and there are additional fees for more than one automation. You can also set up a custom domain to allow your organization to receive incoming email, which some small organizations use as their inbox tool.

The system supports one-time, monthly, and in-kind gifts—with credit card and ACH payments processed by NationBuilder's own payment processor or via a payment processor integration with ActBlue—as well as pledges. Donations are connected to campaigns and source (email or an online form) via tracking codes. You can export transactions for reconciliation with Finance. Membership management requires a Pro subscription, with an add-on required if you need to support more than one membership type. The system includes a variety of dashboards with key metrics and charts tracking goals, activity, growth, finance, and contacts. You can also produce a formatted annual report with one click from the dashboard page.

The NationBuilder Starter plan begins at $348 per year, but does not include custom fields and permission, membership management, email automations, or A/B testing. The Pro plan starts at $1,188 per year. A nonprofit with 1,000 contacts would pay $468 per year under the Starter plan and $1,428 under the Pro plan. A nonprofit with 15,000 contacts would pay $6,228; databases larger than 15,000 contacts require an Enterprise plan, which has custom pricing.

## NeonCRM

### neoncrm.com

NeonCRM is a flexible system that provides solid support for fundraising and donor management along with the ability to manage volunteers, events, membership programs, peer-to-peer fundraising, e-commerce, and grants. Individual users can customize numerous aspects of their experience, from an extensive widget-based dashboard to the configuration of constituent profile screens to the order of items in their navigation menu.

Contact records include the ability to track multiple addresses, relationships, and households, as well as a timeline of all interactions that you can filter by activity. The system supports donations, pledges, in-kind and stock gifts, recurring donations, tributes, memberships, and peer-to-peer fundraising. The membership tool allows you to manage complex multi-level membership programs, track member benefits and credentials, and provide access to a member portal that can display or hide content depending on member type.

A sophisticated workflow automation tool allows organizations to send triggered communications or update records in the database based on a number of actions and events. The system includes a native email tool, and also integrates with MailChimp and Constant Contact. An integration with QuickBooks streamlines the transfer of transactions to the accounting system. Other integrations facilitate nightly NCOA updates, wealth screening, event ticketing, and text messaging.

NeonCRM includes more than 50 standard reports in addition to executive reports that provide analysis of donor retention and reactivation and other Fundraising Effectiveness Project criteria, and also allows you to build your own custom reports. NeonPay, the primary payment processor supported by the system, is included with all subscription packages.

NeonCRM offers four tiers of pricing with increasing access to additional modules, advanced functionality, and training and support. Pricing within the tiers is based on the number of records in the system and includes unlimited users. The entry-level tier, Essentials Light, is for nonprofits with fewer than 500 records, and is $588 per year. Organizations with 1,000 contacts can expect to pay between $1,188 and $3,588 per year, depending on the package selected. Organizations with 20,000 contacts can expect to pay between $7,788 and $9,588 per year.

## Network for Good

### networkforgood.com

Network for Good's donor management tool is a cloud-based, user friendly, all-in-one system that brings together CRM, fundraising, and communication capabilities. The main dashboard, which is not customizable, provides a snapshot of your organization's overall year-to-date fundraising performance and activity. The charts on the page break out active and lapsed donor metrics (with buttons that allow users to click through to see all constituents in each group), recurring donors, and donor retention rates. Subsections of the site contain secondary dashboards with metrics specific to that area (e.g. Contacts, Giving, Communications) and allow you to run reports on data in the subsection.

Contact records contain both individual and organization records, as well as household records that show total household giving and combined giving history. You can track up to three email and two postal mail addresses for a contact; additional addresses require a custom field. All custom fields are grouped together in one section of a record, rather than integrated with other sections. Constituents can update their own profile information online and can also change or update credit cards used for recurring donations. The system supports one-time gifts, monthly giving, tribute gifts, and pledges. Online donations, form submissions, and ticket purchases are automatically added to the database, with no need for administrator review.

A rich set of built-in communication tools allows you to generate letters; send individual and broadcast emails; send broadcast text messages and run text-to-give, text-to-pledge, and text-to form initiatives; and record and send video acknowledgements, personal video messages, and group video messages to donors. While broadcast emails can be scheduled and donation acknowledgement emails are sent automatically, the system does not include any email automations that facilitated triggered email campaigns. All communications sent within the system are logged on constituents' records; you can log external communications by using a bcc email address.

Network for Good provides numerous resources to assist fundraisers throughout the year, including a series of engagement plans developed by fundraising coaches focused on popular fundraising initiatives (e.g. Giving Tuesday, end-of-year giving) that will auto-create a set of tasks and sample content that aligns with best practices, which can be customized and used by nonprofits. Network for Good also provides personal fundraising coaches at a cost of $250 per month. Other features include event ticketing and a peer-to-peer fundraising tool.

In addition to the graphs and charts available on dashboards, the system includes approximately a dozen canned reports, and lets you create dynamic custom filters from nearly every field in the database to be used for custom reporting. Query results and reports can be exported as .CSV files. The system integrates with QuickBooks Online, and you can also set up queries to export transactions for import into other accounting systems.

Pricing starts at $2,400 per year for up to 1,000 contacts and includes an unlimited number of users, free implementation and data migration, and email, phone, and in-app chat/messaging support. Pricing for nonprofits with more than 10,000 contacts requires a custom quote, but an organization with 20,000 contacts could expect to pay around $6,000 per year.

## NonProfitEasy, by Lumaverse Technologies

**nonprofiteasy.com**

NonProfitEasy, a cloud-based CRM and fundraising system, has continued to grow since the last edition of this guide. Developers have focused on deepening the system's analytics capabilities, streamlining the gift entry interface, and implementing robust integrations with partners like DonorSearch and Double the Donation.

Data is at the forefront of the experience, from smart dashboards that allow you to drill down into fundraising data to nearly 250 out-of-the-box reports that let users run, copy, customize, and schedule. Contact records display a large amount of information and data about constituents, their transactions, and wealth data from DonorSearch (NonProfitEasy clients can choose from five different subscription plans) and the system has added household views as well.

Gift entry screens have been streamlined so that all required information is contained on one screen and you can now view and manage recurring gift profiles in the system rather than managing them through your merchant account. The system automatically updates expired credit cards on recurring transactions via an integration with Stripe, and notifies you if a transaction fails. The system supports a variety of gift types, including honor/tribute and in-kind gifts, as well as pledges and matching gifts (via an integration with Double the Donation).

NonProfitEasy facilitates online fundraising with donation widgets, a WordPress plug-in, and pages that allow you to easily add a donor portal and donation forms to your website; a granular query builder that allows you to identify and segment your constituents for email campaigns; a built-in email marketing tool that allows for dynamic gift asks and A/B testing of subject lines and content; and the ability to send out one-click donation emails to individuals with credit cards on file. The system integrates with QuickBooks or you can download transactions for your finance department by scheduling a recurring report.

In addition to donor and gift management, NonProfitEasy also provides tools for membership, volunteer management, e-commerce, and peer-to-peer fundraising tools. Additional functionality is available through integrations with MailChimp, Google Maps, UJoin, SmartyStreets, and Zapier. The vendor reports that additional enhancements are planned for release before the end of 2020, including more changes to contact views, additional graphs and charts, and two-way text messaging.

Pricing is based on the number of households in the database and starts at $1,000 per year for nonprofits with up to 1,000 households in their database. Nonprofits with up to 25,000 households can expect to pay $5,000 per year.

## Salesforce Nonprofit Success Pack

### www.salesforce.org/nonprofit/nonprofit-success-pack/

Salesforce's Nonprofit Success Pack (NPSP) is part of the company's Nonprofit Cloud offerings and adapts the sophisticated power of the for-profit Salesforce platform to meet the needs of nonprofit organizations.

The highly-configurable dashboards available in the system provide you with a visual snapshot of program, fundraising, and campaign performance, and you can drill down to see the underlying data that comprise the many charts and graphs. NPSP comes with a variety of popular fundraising reports and also includes a powerful custom report and dashboard builder.

The new Salesforce.org Elevate product suite (available for an additional cost) includes a platform that integrates your online payment gateways with NPSP and donation forms that integrate with the Payment Services platform and NPSP. Engagement plans allow you to create automated moves management workflows for donor cultivation. The platform also supports volunteer management and membership programs. The new Accounting Subledger, available for an additional cost, includes pre-built templates for connecting NPSP with a variety of popular accounting systems.

NPSP includes a built-in email tool that allows you to send up to 5,000 emails at a time, and larger email sends are possible with additional integrated email and multi-channel marketing solutions. The Marketing Cloud add-ons include a powerful drag-and-drop visual process builder for marketing automations and their Einstein Engagement Scoring, which is an AI-based predictive analytics tool to help optimize your email campaigns. Additional functionality is also available through the Salesforce AppExchange, which has an entire section dedicated to nonprofit-focused apps. Salesforce's developer platform and APIs also provide the ability for custom-developed solutions.

The flexibility, configurability, and power of Salesforce provides a great deal of potential, but it requires training to set up and customize the system for your needs and can pose challenges for non-technical users new to the system. Salesforce's Trailhead system provides training for users at all levels to help increase knowledge of and comfort with the system. A large variety of partners provide implementation services for new customers, with different levels of pricing and support.

The NPSP is free to add to your Salesforce setup, but you'll need Salesforce licenses to use it. Any 501(c)3 may qualify, and Salesforce will provide your first 10 subscriptions free. Additional licenses for the Sales Cloud Enterprise Edition are available at a cost of $432 per year. Add-ons for extended functionality described above have additional licensing costs, as well.

## Salsa CRM by Salsa

**www.salsalabs.com**

Salsa continues to be a popular tool in the online fundraising sector, providing nonprofit fundraisers with strong functionality across the board. Salsa CRM comes bundled with Salsa Engage, the company's online fundraising and marketing automation tool, allowing nonprofits to manage both online and traditional donor programs as well as membership, events, peer-to-peer fundraising, text messaging, and social media campaigns. Salsa Engage also offers an optional Online Advocacy add-on module for an extra cost. In addition, Salsa offers Salsa Engage for Salesforce so that organizations using Salesforce as their constituent CRM can sync constituents, activity, and engagement data between the two systems.

Many of the actions within Salsa are accomplished via drag-and-drop interfaces or plain language tools. Individual users have the ability to control and customize the number and placement of widgets on their dashboards to prioritize the information and data most important to them. Integrations with WealthEngine and DonorSearch provide organizations with the ability to gather additional wealth and demographic data on constituents, while Salsa Engage's social lookup tool matches constituents with their social media profiles.

Users can add constituents to groups—which can either be static or update dynamically—for the purposes of messaging and reporting, or use an advanced query builder to identify and manage different types of data. Donations can be attributed to funds, campaigns, and appeals, and integrations with Double the Donation and MatchPro 360 can identify and manage matching gifts. An integration with Google Docs allows users to collaborate on letters with others in the organization and still pull in dynamic merge fields.

A very rich workflow management tool facilitates moves management and grants management, allowing organizations to set up numerous workflow processes, each with its own set of phases and tasks. The system also allows for triggered email sends, making communications such as welcome series or mid-level donor cultivation easy. A performance dashboard provides an executive-level look at overall fundraising metrics, and the system also comes with a variety of canned reports, which can be modified and scheduled.

Pricing is based on the number of contacts in an organization's database and all subscriptions allow for an unlimited number of users. Pricing starts at $2,988 per year for organizations with up to 2,500 contacts, and an organization with 25,000 contacts could expect to pay $6,800 per year.

## Sumac, by Silent Partner Software

**www.sumac.com**

Sumac's simple interface, modular approach, and configurability makes it a flexible system for nonprofits looking for a straightforward tool to manage donor information, collect online donations, and manage fundraising campaigns.

The system requires a "console" to be installed on each user's computer to access the database, which is stored in the cloud. Contact records allow you to store multiple addresses for constituents, including seasonal addresses, as well as personal information and contact preferences and a history of all interactions and donations. Users can extend the information collected by using custom fields, which can appear in any area of the contact record.

Donations can be entered manually or collected online, with the system using iATS as the payment processor and providing preferred rates to clients, or you can import them from a spreadsheet. Sumac's web integration service provides web pages that can be customized to reflect the design of your website and embedded on your website's pages. An optional pledge module allows you to manage both pledges and recurring donations.

The system includes templates and samples for letters and emails that you can customize and send. Emails are sent using your organization's mail servers, or you can send groups of contacts to either Constant Contact or MailChimp for broadcast emails. The system integrates with QuickBooks and Sage's Simply

Accounting, or you can export transactions using the reporting tool to upload into your finance software.

Although there are no dashboards in the system, it comes with a variety of pre-built reports commonly used by nonprofit fundraisers that you can copy, email, print, or export. You can't make changes to these pre-built reports, but you can use the advanced search tool, which provides a graphical interface you can use to build a query and export the results for reporting.

Pricing for the system depends on the number of users, contact records, and modules selected. A nonprofit with five users and up to 1,500 contact records can expect to pay $900 a year for the Standard plan and a nonprofit with 10 users and up to 20,000 records can expect to pay $3,000 per year for the Established plan. Both of these plans include basic CRM and unlimited support, but require add-ons for website pages (to collect online donations), pledges (required for recurring donations), forms, volunteer management, membership, and more. Sumac also offers a free Basic version of the system.

## Trail Blazer Non-Profit Manager

**www.trailblz.com**

Trail Blazer Non-Profit Manager is an affordable donor management tool that combines basic fundraising functionality with solid reporting and good event management features. Constituent records allow users to track multiple phone numbers and mailing addresses and up to two email addresses. You can track households and organizations in the system as well as individual constituents. Users can also categorize constituent records with an unlimited number of attributes, and different users can select which attributes they see and use. Log notes allow you to track a variety of interactions in the system, including volunteer hours, and you can create reports based on log note types.

The system supports a variety of gift types, including pledges, tribute gifts, and in-kind gifts. Users can set up a variety of web forms and collect online donations and event registrations and even add a donation form to their organization's Facebook page. The system integrates with four payment processing systems: Authorize.net, PayPal, Vanco Payment Solutions, and Anedot. Some of the payment processors allow you to set up recurring donations, accept payments on mobile devices, and collect text-to-give transactions. The vendor also provides a mobile app for Apple and Android devices that allows you to view and update contact records and log notes.

The system provides a variety of templates that you can update and use for letters and emails. While there is not a drag-and-drop editor like in some other systems, the vendor will help customers create new templates. Letters can include a number of merge fields, but there are some limitations on the number and type of custom fields that can be used. Once you generate a batch of letters, you can click a button at the bottom of the screen to mark the letters as "sent" on constituent records. An array of standard reports are available, and frequently-used reports can be marked as favorites.

The system allows you to preview the report and easily change the sort order or hide columns you don't want to include. You can save different views of data in the system and each user can set their own default view for queries. In addition to managing donors, the system includes modules for events (including ticket sales with reserved seating) and canvassing. The software is installed on each user's computer, with the database hosted in the cloud.

Trail Blazer Non-Profit Manager is priced based on constituent record count and allows for unlimited users. Pricing starts at $600 per year for up to 500 contacts. A nonprofit with 1,000 contacts could expect to pay $1,200 per year, while one with 20,000 contacts could expect to pay $3,360 per year. One-time set up fees for new clients range from $295 to $495.

## Virtuous

### virtuouscrm.com

Virtuous provides nonprofits that have larger constituencies with a robust set of tools for constituent management, fundraising, marketing and engagement, and automation that they can use for highly personalized donor outreach and engagement. It is a modular system that allows users to select the tools they need from a variety of functions, including email marketing, online giving, and automation, but that means the price can vary significantly based on the features selected.

The system dashboard is customizable based on a user's profile, security, and permissions, and features interchangeable widgets that you can add and delete. It also includes a "best calls to make today" report that uses predictive analytics to score and rank records. In addition to tracking the usual details on a constituent record, users can: add custom fields and custom objects to a record; pull in a contact's social data and profile image; see where the contact lives in relation to other contacts in the database; view a financial score and social score to determine a contact's social influence and suggested gift asks based on past giving patterns; and track a contact's visits to your website (including pages viewed and forms filled out). This data can be used to trigger follow-up emails or targeted content.

The system supports a wide variety of payment types for gifts, and also provides the ability to specify and track donor premiums. You can create letters and emails using templates provided by the vendor, or by creating your own template. You can also create sophisticated email automations, such as new donor welcome series, and even design color postcards and letters up to four pages in length, and build automations that trigger the printing and mailing of the pieces.

The system's query tool allows you to create complex queries that can nest, searching across multiple objects and data points. You can use the query results to perform bulk actions in the system or download the results, and you can save and favorite queries you create. The system includes several pre-built graphical reports and also offers an integration with Mode Analytics that allows you to embed custom-designed reports in Virtuous.

Pricing depends on the number of users and contacts in the system and the package selected. For the functionality discussed here, pricing starts at $5,400 per year for a package that includes CRM, email marketing, automation, and online giving for five users and up to 1,000 contacts. This package does include limits on the number of outbound emails allowed per month and on the number of automation workflows the system will support. Pricing for a more robust package with unlimited users, additional outbound emails, and unlimited automations exceeds the definition of "low cost" that we used to determine systems for inclusion in this report.

# RECOMMENDATIONS BY USE CASE

For each of the following 12 use cases, we've identified the systems that we think most effectively meet those needs. Remember, systems can meet *more than one* use case, and systems can also be used to support use cases for which we've not identified them. These selections are our best efforts, but are not definitive.

Keep in mind that there are other systems not included in this report for reasons of eligibility—either cost, customer base, or for other reasons—that might meet your particular needs as well as any of these.

Finally, remember that the systems we've chosen for longer reviews are not necessarily the best systems, nor do they appear in any ranked order in this guide.

**You're a tiny but growing organization, and price is critical...**
The following systems provide donor management and fundraising tools for organizations with fewer than 1,000 constituent records for less than $1,000 a year.

- DonorSnap
- Eleo
- Little Green Light
- NationBuilder
- Sumac

**You are a midsize organization and want a tool that can grow with you...**
As your organization grows, so does your need for software that can help you track a large volume of constituents and run more complex campaigns.

- Blackbaud Raiser's Edge NXT
- CharityEngine
- EveryAction
- Salesforce Nonprofit Success Pack
- Virtuous

**You're pretty tech savvy, and you want a free system...**
While these systems are available for nonprofits to use at no cost, they do require technical expertise to set up and operate.

- CiviCRM
- Salesforce Nonprofit Success Pack

**You need something easy to set up and use...**
Most systems provide access to training and implementation services, but a few make the set up process easy and quick and don't require intensive training.

- @EASE Fund Development Software
- Bloomerang
- DonorPerfect
- DonorSnap
- Eleo
- Keela
- Network for Good

**You are looking for a system you can expand with a variety of third-party integrations...**
Pre-built integrations are helpful for nonprofits who want to extend the core functionality of a system using tools with which they may already be familiar.

- DonorPerfect
- NonProfitEasy
- Kindful
- Salesforce Nonprofit Success Pack

**You need a system with high-touch customer support...**
Comfort with technology varies among nonprofit staff and if the people who run your fundraising programs are less technically inclined, software that provides a lot of in-system and one-to-one technical support is often a good fit.

- @EASE Fund Development Software
- Bloomerang
- DonorSnap
- Eleo
- Kindful
- Trail Blazer Nonprofit Manager

**Fundraising events are a critical part of your process...**
A pandemic may have curbed in-person events in 2020, but once we can resume face-to-face gatherings some nonprofits will need fundraising software that can also help them manage their galas, auctions, and 5K runs/walks.

- CharityEngine
- DonorPerfect
- Eleo
- ExceedFurther
- Keela

**You need a system that includes robust membership tools...**
Most systems have the ability to accept membership payments and renewals, but several of the platforms we looked at have the ability to manage more complex membership programs.

- EveryAction
- ExceedFurther
- NeonCRM

**You want to build a strong sustainer program...**
Recurring donors are at the heart of efforts to create a stable fundraising program. The following systems provide strong tools to cultivate and manage sustaining donors.

- Blackbaud Raiser's Edge NXT
- CharityEngine
- EveryAction

**You want a system that will help with donor engagement efforts...**
Long-term donor relationships require more than just fundraising asks. A number of systems help you engage donors with cultivation plans, advocacy tools, and other non-donation-based actions.

- Blackbaud Raiser's Edge NXT
- Bloomerang
- EveryAction
- NationBuilder
- Network for Good
- Salsa
- Virtuous

**You need a system that can help you track multichannel fundraising campaigns...**
Multichannel donors are often a nonprofit's most loyal and most valuable supporters, but tracking the performance of fundraising campaigns across multiple channels can be challenging.

- Blackbaud Raiser's Edge NXT
- CharityEngine
- DonorPerfect
- EveryAction
- NeonCRM

**You want a modular system that allows you to add sections as your programs expand...**
Sometimes you want to start simple, but also want to be able to add functionality as you grow into a tool. Modular systems allow you to turn on and off sections of the platform as you need them.

- CiviCRM
- eTapestry
- ExceedFurther
- Sumac
- Virtuous

# COMPARISON CHARTS ▶▶▶

The following charts offer a high-level overview of how the 12 systems we selected for extended profiles compare in terms of pricing and functionality.

## Pricing

We asked vendors to provide an estimated yearly cost for their system for two different fictional nonprofits: one with a database of 1,000 contact records and three staff members who need to access the system and one with a database of 20,000 contact records and 10 staff members who need to access the system. Please note that these estimates do not include implementation costs, which vary by vendor and by the complexity of the data being migrated into the system, so first-year costs for the systems will be higher in many cases.

| System | 1,000 contacts, 3 users | 20,000 contacts, 10 users |
|---|---|---|
| Bloomerang | $1,188 | $4,788 |
| CharityEngine | $1,788 | $5.148 |
| CiviCRM | $0 | $0 |
| DonorPerfect | $1,068 | $5,748 |
| Eleo | $468 | $2,388 |
| eTapestry | $1,188 | n/a |
| EveryAction | $1,308 | $5,388 |
| Keela | $1,068 | $4,788 |
| Kindful | $1,200 | $4,800 |
| Little Green Light | $421 | $745 |
| NeonCRM | $1,188-$3,588 | $7,788-$9,588 |
| Salesforce Nonprofit Success Pack | $0 | $0 |

## Features

The following chart summarizes each system's alignment with the 10 categories of functionality defined in our evaluation rubric (see Appendix B) based on how their system performs 41 core functions.

A "Standard" rating means that the system generally aligns with the functionality present in similar types of systems in the marketplace. Systems with an "Enhanced" rating include features in the category that are not universal, but are still frequently seen. The "Advanced" rating means that a system includes functionality that is only occasionally available in similar systems.

For a detailed look at how these systems compare in terms of functionality, visit the digital version of this guide, where you can search and sort features using a more comprehensive comparison chart, choose which systems you'd like to compare head-to-head, and find systems by use case.

The free digital guide can be found at [https://guides.techimpact.org/donor-management-systems](https://guides.techimpact.org/donor-management-systems).

| Functionality | Bloomerang | Charity Engine | CiviCRM | DonorPerfect | Eleo | eTapestry | EveryAction | Keela | Kindful | Little Green Light | NeonCRM | Salesforce Nonprofit Success Pack |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Donation Management | E | A | E | A | E | E | A | E | E | E | A | E |
| Constituent Management | E | A | E | E | E | E | A | E | E | E | A | A |
| Prospecting & Proposals | E | A | A | A | E | E | A | E | S | E | A | A |
| Communication | E | E | A | A | E | E | A | S | E | E | E | E |
| Other Interactions | E | E | A | E | S | E | E | S | S | E | A | E |
| Payments & Accounting Integrations | A | E | A | E | E | E | E | S | E | E | E | A |
| Search, Queries & Reporting | E | A | A | A | E | E | E | E | E | E | E | A |
| Other Integrations | E | E | A | E | S | S | E | S | A | E | E | A |
| Security, Customization & Configuration | S | E | S | E | E | E | E | S | S | S | E | A |
| Training & Support | E | E | S | E | E | E | E | S | E | S | A | A |

S Standard  E Enhanced  A Advanced

# EXTENDED PROFILES ▶▶▶

## Bloomerang

### bloomerang.co

Bloomerang's focus on donor retention is evident as soon as you log in to the system. With a prominent donor retention graphic on the dashboard, automated first-time donor call task assignments, and an engagement level meter on each constituent profile page, the system provides clear metrics, visual indicators, and actions that help a nonprofit cultivate repeat donors. A vertical timeline of interactions, with icons for different types of tasks, makes donor activities quickly viewable, and the timeline can be filtered by activity type. The system includes free nightly NCOA updates for address and deceased status changes. An integration with DonorSearch displays a constituent's "generosity score" and users with a DonorSearch subscription can click through to the site for more detailed information.

The process for entering donations into the software is straightforward, and gifts can be associated with funds, campaigns, and appeals. The system includes a robust pledge module that allows you create and customize a payment schedule and also prompts you to apply a gift to an open pledge when doing gift entry. Recurring donations are supported as well, and customers who use Stripe as a payment processor can take advantage of Bloomerang's free Stripe account upgrade that auto-updates expiring credit cards. The system also offers integrations with two additional payment processors: Moolah and Authorize.net.

Web form templates for online giving, event registration, email signup, volunteer activity, and more make it easy to bring data into the system. Integrations with Qgiv, Givebutter, FundraiseUp, Mobile Cause, and Zapier extend the functionality of the system, facilitating such activities as text-to-donate, peer-to-peer fundraising, and donor portals. The system also integrates with QuickBooks and Aplos for accounting. An API allows customers to develop custom integrations as well.

Reports can be built from scratch or users can access a variety of canned reports included with the system, which can also be modified and saved for future use but cannot be added to a "favorites" list. A recent update allows users to schedule reports to run at a certain time or interval and be delivered by email. When generating letters for donors, the system will create a PDF file of letters and a .CSV file of addresses for download. Emails can be sent from the vendor's servers (with interactions recorded on constituent records) or via an integration with MailChimp.

For the purposes of billing, the system uses households to define a "record" rather than individual constituent profiles. Pricing begins at 1,000 records and 5,000 emails per month for $1,188 per year. A version for up to 25,000 records and 125,000 emails per month costs $4,788 per year. All versions allow unlimited online giving pages/forms, an unlimited number of users, and free email/chat support and group training. Unlimited personal support is available for an extra charge. There is no setup cost for new customers who import their own data using the system's import tool, but customers also have the option to purchase a custom implementation package that is priced based on the complexity of data being imported.

## System Summary

- Year Launched: 2012
- Pricing, Small Nonprofit (1,000 contacts, 3 users): $1,188/year
- Pricing, Mid-size Nonprofit (20,000 contacts, 10 users): $4,788/year

## System Evaluation

A detailed evaluation of the system against the functionality defined in our rubric in Appendix B is available with the online version of this report at https://guides.techimpact.org/donor-management-systems/system/bloomerang/

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Donation Management** | | | |
| Gift Records | M | M | P * |
| Pledges | M | M | P |
| Recurring Gifts | M | M | M |
| Online Donations | M | M | M ** |
| Other Gift Types | M | M * | M * |
| **Constituent Management** | | | |
| Contact Records | M | P * | M |
| Householding | M | P | P |
| Online Contact Forms | M | M | M ** |
| Interactions | M | M | M |
| Groups/Tagging | M | M | D |
| Donor Research | M | M | D |
| Duplicate Management | M | M | P |
| **Prospecting & Proposals** | | | |
| Workflow | M * | M | P |
| Grant/Proposal Management | N/A | M * | D |
| **Communication** | | | |
| Letters | M | P | M |
| Email | M | M | P ** |
| Content | M | D | D |
| Text Messaging | N/A | M | D |
| Marketing (Email) Automation | M | M ** | M ** |

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Other Interactions** | | | |
| Events | M | M * | P */ ** |
| Volunteer Management | M * | M * | D |
| Membership | M | M * | D |
| Peer-to-Peer Fundraising | M | D | D |
| **Payments & Accounting Integrations** | | | |
| Payment Processing | M | M | M |
| Transaction Exports/Accounting Integration | M | M | M |
| Reconciliation | M ** | M ** | M ** |
| **Search, Queries & Reporting** | | | |
| Search | M | M | M |
| Queries | M | M | D |
| Reports | M | P | P |
| Dashboards | M | D | D |
| **Other Integrations** | | | |
| Integrations | M | M | D |
| APIs | M | M | M |
| **Security, Customization & Configuration** | | | |
| Security | M | P | D |
| Permissions | M | D | D |
| Customization | P | P | D |
| Mobile Access | M | M | M |
| **Training & Support** | | | |
| Training | M | M | M *** |
| Support | M | M *** | P |

M Meets   P Partially Meets   D Does Not Meet

* Certain functionality requires use of a custom field.
** Certain functionality requires an integration with a third-party system.
*** Certain functionality is available for an additional cost.

## CharityEngine

### www.charityengine.com

CharityEngine is a cleanly-designed donor CRM and fundraising system that provides robust functionality with features that help make the system more approachable for non-technical users. The dashboard is arranged around a prominent search bar that poses the question "What would you like to do today?" where users can type an action to pull up a list of related pages. The system is color-coded by section, and the color theme changes as you move from section to section. The dashboard features a variety of widgets that you can click into to drill down to the underlying data, or you can click a button to export all the results from the widget. Contact records consist of a series of panels that group information and interactions that you can expand, collapse, or close, and you can print or make PDFs of entire records with one click.

The system supports a variety of gift types, including tribute gifts, pledges, and recurring donations. There is a particular focus on sustainer giving, including a pre-built communications series for sustainers with declined transactions, an automatic credit card updater for expiring credit cards, and a sustainer reactivation form (rather than a new sustaining donation form) to improve reporting on sustainer retention over periods of time. An integration with Double the Donation facilitates matching gifts, and an integration with WealthEngine provides prospect ratings and donor research.

A form creation wizard walks you through a screen-by-screen process for creating several different types of forms, including donation forms, event registration forms, and information collection forms. While the wizard only requires fairly minimal information to create a polished-looking form, there are numerous options for enhancing, customizing, and formatting the forms, success pages, and auto-responders. Donations collected through online forms can either go directly into the database or be held in a pending state for review and approval.

The system includes a robust automation tool that allows you set up triggered email sends and series, auto-create task assignments based on triggers, and update records based on specific criteria. Email and letter templates can be created in the system using its WYSIWYG editor and the vendor will build an email template, web form template, and letter template for new clients during implementation. You can see performance metrics for all email sends. The system also supports broadcast text messaging.

The events module is particularly robust, allowing you to create events, collect registrations online, sell a variety of tickets (including multiple sessions within an event), manage a waitlist, assign tables and seating, manage guests, connect an event to a peer-to-peer fundraising campaign, manage volunteer assignments, and check attendees in onsite. You can also provide registrants with the ability to manage their own tickets and guests online. CharityEngine also includes the ability to manage membership and volunteers.

The base implementation price for a smaller organization is generally in the range of $4,000–5,000 and includes system setup, customer training and education, and a basic data import. Implementation costs increase for more complex data migration. Subscription pricing is based on the features and functionality selected, the number of contact records, and the number of outbound emails allotted per month, and generally starts at about $4,188 per year.

### System Summary

- Year Launched: 2013
- Pricing, Small Nonprofit (1,000 contacts, 3 users): $1,788/year
- Pricing, Mid-size Nonprofit (20,000 contacts, 10 users): $5,148/year

### System Evaluation

A detailed evaluation of the system against the functionality defined in our rubric in Appendix B is available with the online version of this report at https://guides.techimpact.org/donor-management-systems/system/charity-engine/

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Donation Management** | | | |
| Gift Records | M | M | M |
| Pledges | M | M | M |
| Recurring Gifts | M | M | M |
| Online Donations | M | M | M |
| Other Gift Types | M | M | M |
| **Constituent Management** | | | |
| Contact Records | M | M | P * |
| Householding | M | M | P |
| Online Contact Forms | M | M | M |
| Interactions | M | M | M |
| Groups/Tagging | M | M | M |
| Donor Research | M | M | M |
| Duplicate Management | M | M | P |
| **Prospecting & Proposals** | | | |
| Workflow | M | M | M |
| Grant/Proposal Management | N/A | M | D |
| **Communication** | | | |
| Letters | M | P | M |
| Email | M | P | P |
| Content | M | M | M |
| Text Messaging | N/A | D | M |
| Marketing (Email) Automation | M | M | M |
| **Other Interactions** | | | |
| Events | P | M | P |
| Volunteer Management | M | M | D |
| Membership | M | M | P *** |
| Peer-to-Peer Fundraising | D | M | M |

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Payments & Accounting Integrations** | | | |
| Payment Processing | M | M | M |
| Transaction Exports/Accounting Integration | M | P | P |
| Reconciliation | M | M | D |
| **Search, Queries & Reporting** | | | |
| Search | M | M | D |
| Queries | M | M | M |
| Reports | M | M | M |
| Dashboards | M | M | M |
| **Other Integrations** | | | |
| Integrations | M | M | D |
| APIs | M | M | M |
| **Security, Customization & Configuration** | | | |
| Security | M | M | M |
| Permissions | M | M | M |
| Customization | M | M | D |
| Mobile Access | M | M | D |
| **Training & Support** | | | |
| Training | M | M | M |
| Support | M | M | P |

M Meets    P Partially Meets    D Does Not Meet

* Certain functionality requires use of a custom field.
** Certain functionality requires an integration with a third-party system.
*** Certain functionality is available for an additional cost.

## CiviCRM

### civicrm.org

CiviCRM is an open source web-based platform that helps nonprofit organizations organize constituent information, handle donations and memberships, and engage communities. You can download and deploy the code for the system inside one of four open source web content management systems: Drupal, WordPress, Joomla, or Backdrop. It's free to use, and the code is free to study and share.

The platform is built around the core CRM functionality, which means that contact records are the hub of all functionality. Individual, organizational, and household contact records allow you to collect and use a great deal of information about your constituents and their relationships. The system is modular and includes a variety of components and extensions that you can enable and add as desired. Components deliver major features: CiviContribute handles donations, CiviMail manages bulk email sends, CiviEvent offers registration and event management, CiviCampaign tracks progress toward goals across several component modules, and CiviVolunteer assists with volunteer tracking and scheduling. Other modules assist with grants, advocacy, and case management. Extensions enhance functionality, but more narrowly than components. For example, CiviRules provides automation capability for tasks such as record updates and triggered emails. A core team of six developers, one project manager, and a community of around 100 individual contributors builds and maintains the CiviCRM project, components, and extensions. As such, the rate of development—of the core, of components, and of extensions—varies.

The components themselves, with proper configuration, provide solid support for most donor management and fundraising efforts. You can collect and manage a variety of gift types, including pledges, recurring donations, tribute gifts, in-kind donations, and more. You can manage letter, email, and text message communications; set up and mange events and membership programs; schedule and track volunteers; and build reports that provide insight into your supporters and the performance of your fundraising programs.

While there's no fee for the CiviCRM platform, the system does require an open source web CMS. Technical expertise—either in-house or provided by consultants—is necessary to install and configure the system properly. You will need to set up an account with one or more payment processors in order to accept credit card and ACH transactions (which are necessary for online donations). There is extensive documentation of the system and components available online, but any training and support needs to be provided by a consultant with system expertise. If you need technical assistance with the system, CiviCRM.org maintains a list of partners that provide consulting, development, or hosting services.

### System Summary

- Year Launched: 2005
- Pricing, Small Nonprofit (1,000 contacts, 3 users): $0
- Pricing, Mid-size Nonprofit (20,000 contacts, 10 users): $0

### System Evaluation

A detailed evaluation of the system against the functionality defined in our rubric in Appendix B is available with the online version of this report at https://guides.techimpact.org/donor-management-systems/system/civicrm/

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Donation Management** | | | |
| Gift Records | M | D | P |
| Pledges | M | M | P |
| Recurring Gifts | M ** | M ** | M ** |
| Online Donations | M | M | D |
| Other Gift Types | M | D | D |
| **Constituent Management** | | | |
| Contact Records | M | P * | D |
| Householding | M | P | P |
| Online Contact Forms | M | M | M |
| Interactions | M | M | M |
| Groups/Tagging | M | M | M |
| Donor Research | M | M | D |
| Duplicate Management | M | M | M |
| **Prospecting & Proposals** | | | |
| Workflow | M | M | M |
| Grant/Proposal Management | N/A | M | M |
| **Communication** | | | |
| Letters | P | P | P |
| Email | M | M | P |
| Content | M | M | M |
| Text Messaging | N/A | M | M |
| Marketing (Email) Automation | M | M | M |
| **Other Interactions** | | | |
| Events | M | M | M ** |
| Volunteer Management | M | P | M |
| Membership | M | M | M |
| Peer-to-Peer Fundraising | D | M | D |

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Payments & Accounting Integrations** | | | |
| Payment Processing | M | M | M |
| Transaction Exports/Accounting Integration | M | P | M |
| Reconciliation | M | M | M |
| **Search, Queries & Reporting** | | | |
| Search | M | M | D |
| Queries | M | M | D |
| Reports | M | M | M |
| Dashboards | M | M | M |
| **Other Integrations** | | | |
| Integrations | M | M | M |
| APIs | M | M | M |
| **Security, Customization & Configuration** | | | |
| Security | N/A | N/A | N/A |
| Permissions | M | M | M |
| Customization | M ** | M ** | M |
| Mobile Access | M | M | M |
| **Training & Support** | | | |
| Training | M *** | P *** | M *** |
| Support | P | M *** | P |

M Meets P Partially Meets D Does Not Meet

* Certain functionality requires use of a custom field.
** Certain functionality requires an integration with a third-party system.
*** Certain functionality is available for an additional cost.

## DonorPerfect, by SofterWare

**www.donorperfect.com**

With strong donor management functionality, the ability to support multichannel campaigns, and numerous features that help non-technical users navigate the system, DonorPerfect has elements that appeal to both new users and power users. From a welcome screen that provides a comprehensive system tutorial to a "Walk Me Through" button that provides contextual help for each page of the system to its numerous tool tips and contextual help links, DonorPerfect makes it easy for non-technical users to get the help and context they need to accomplish key tasks. Power users can create and work with donor segments, create automated workflows with the system's "Smart Action" tool, and save and schedule custom reports that allow them to work with the data they need.

The system supports a variety of gift types, including tribute giving, in-kind donations, and stock gifts. The pledge module is used to track both pledges and recurring gifts. You can create a payment schedule for a pledge and customize individual installments. Recurring gifts are automatically processed at the specified interval. The system supports online donations and you can choose whether you would like these donations to be held in a queue for review and approval or be added to the database automatically.

Contact records allow you to enter multiple addresses, including seasonal addresses with dates that you can use for mailings. These records also include both online and offline interactions and giving totals. While you can define relationships between constituents, the system does not include a householding feature that allows you to see combined giving totals for individuals within the household. An integration with DonorSearch allows you to pull in wealth data and prospect ratings for constituents in the system. You can use contact forms to ask donors to update their information or use the system's integration with GiveCloud if you want to create a self-service donor portal.

The system includes a large variety of online form templates for donations, signups and surveys, different types of events, and memberships. Forms can be customized with a built-in form styler (or by editing the form's CSS) and can be embedded on your website or standalone. You can send individual emails to donors that include your email address in the CC: field so you can save any conversations in your email tool. Broadcast emails are sent via a two-way integration with Constant Contact that will add email performance metrics to contact records.

A robust event tracking tool allows you to accept online registrations, manage registrants and guests, and manage tables at galas. You can accept online payments using the system's mobile app and a credit card swiper. The system also includes native tools for volunteer tracking, memberships, and crowdfunding. Integrations with both QuickBooks Desktop and QuickBooks Online help streamline accounting processes. A marketplace featuring numerous integrations and an open API allow you to further extend the functionality of the system, but many of the integrations require additional subscriptions.

New clients can take advantage of a hands-on implementation process that starts with a needs analysis to identify how best to set up screens and customize the system. DonorPerfect will help you create your first donation form and activate your account with its built-in payment processor. You can use the import tool for a self-service data conversion, or you can work with the vendor to transfer your data from other systems.

Pricing for the system is based on the number of contact records and is divided into five packages; all packages include unlimited users and web chat support. An organization with 1,000 contacts using their "Lite" package can expect to pay $1,068 per year, while an organization with 20,000 contacts using their "Premier" package would pay $5,748 per year.

## System Summary

- Year Launched: 2001
- Pricing, Small Nonprofit (1,000 contacts, 3 users): $1,068/year
- Pricing, Mid-size Nonprofit (20,000 contacts, 10 users): $5,748/year

## System Evaluation

A detailed evaluation of the system against the functionality defined in our rubric in Appendix B is available with the online version of this report at https://guides.techimpact.org/donor-management-systems/system/donorperfect/

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Donation Management** | | | |
| Gift Records | M | M | M * |
| Pledges | M | M | M |
| Recurring Gifts | M | M | M *** |
| Online Donations | M | M | P |
| Other Gift Types | M | M | M |
| **Constituent Management** | | | |
| Contact Records | M | M */ ** | P |
| Householding | D | P | D |
| Online Contact Forms | M | M | M ** |
| Interactions | M | M | M |
| Groups/Tagging | M | M | M |
| Donor Research | M | M | D |
| Duplicate Management | M | M | P |
| **Prospecting & Proposals** | | | |
| Workflow | M | M | M |
| Grant/Proposal Management | N/A | M | D |
| **Communication** | | | |
| Letters | M | M | M |
| Email | M | M | M ** |
| Content | M | M | M |
| Text Messaging | N/A | M | D |
| Marketing (Email) Automation | M | M | M ** |

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Other Interactions** | | | |
| Events | P | M | M ** |
| Volunteer Management | M | M | D |
| Membership | M | M | P |
| Peer-to-Peer Fundraising | M | M | M |
| **Payments & Accounting Integrations** | | | |
| Payment Processing | M | D | D |
| Transaction Exports/Accounting Integration | M | M | M |
| Reconciliation | M | M ** | D |
| **Search, Queries & Reporting** | | | |
| Search | M | M | M |
| Queries | M | M | M |
| Reports | M | M | M |
| Dashboards | M | M | M *** |
| **Other Integrations** | | | |
| Integrations | M | M | M |
| APIs | M | M | D |
| **Security, Customization & Configuration** | | | |
| Security | M | D | D |
| Permissions | M | M | M |
| Customization | M | M | M |
| Mobile Access | M | M | M |
| **Training & Support** | | | |
| Training | M | M | M *** |
| Support | M *** | M *** | P |

M Meets P Partially Meets D Does Not Meet

* Certain functionality requires use of a custom field.
** Certain functionality requires an integration with a third-party system.
*** Certain functionality is available for an additional cost.

## Eleo, by Community Software Solutions

### eleoonline.com

Eleo is an affordable donor management software solution focused on meeting the needs of small nonprofits and providing comprehensive training and support to clients. The system provides solid donor management and online fundraising support with a variety of modules that help nonprofits manage constituents, donor giving history, events, membership, volunteers, and grant proposals.

Constituent profiles allow you to track multiple addresses, communications preferences, and other donor data, such as social media profiles. While Eleo does not include household functionality, it lets you add a spouse name and track other relationships within the system. An integration with DonorSearch allows you to bring in prospect data and additional information. (While this requires a separate DonorSearch subscription, Eleo clients receive a discounted rate.) Constituent interactions are color-coded and can be filtered by type, but transaction-related interactions are held on a separate tab.

The system does not include a self-service constituent portal, but you can collect contact record updates via online forms, which are run through a duplicate checker and held in a queue for review and approval. You can assign status, priority, and a staff contact to a constituent and track prospecting workflow with tasks, but this is done manually.

Eleo supports a variety of gift types, including tributes, in-kind donations, and stock gifts. A pledge module allows you to create and customize a payment schedule and add a credit card to a pledge. Online donation forms have a variety of customization options, including adding header and footer images, changing colors and fonts, and moving fields around. You can also add the option to online donation forms that allows donors to cover processing fees. The system integrates with two payment processors: Stripe and Braintree.

Acknowledgement letters and emails can be sent individually or held in batches, but you need to click a button to log a letter or email to a constituent profile as an interaction. Marketing emails are sent via an integration with Constant Contact or MailChimp.

The system includes a basic query builder and numerous canned reports, as well as a custom report builder. Reports can be exported, saved, and marked as favorites, but cannot be scheduled. Contacts pulled on any report can also be saved to a list. Lists are based on filters and can be either static or dynamic. You can set up a report to format transactions for export to accounting systems, and the system integrates with QuickBooks online for a seamless transfer.

Additional system modules include a robust event module, a volunteer module, a membership module that facilitates multiple membership types and levels, and a grants module that takes advantage of the system's project management tools and also includes grants-specific reports and a grants custom report writer.

All packages include unlimited live phone and email support, with a one-ring standard for phone calls and email responses in less than 24 hours. Data migration is included in implementation at no extra cost, and the onboarding process includes a game board that takes customers through a step-by-step process of getting familiar with the system. The vendor provides unlimited personalized training for all users, regular webinars, and a robust knowledge base that even includes a glossary of terms. In-system help is available for every page, and the customer can customize these help screens with their own best practices.

Pricing is based on the number of donor records in the database and includes all modules, unlimited users, and unlimited support and training. An organization with 1,000 contacts can expect to pay $468 per year for the system, while an organization with 20,000 contacts can expect to pay $2,388 per year.

## System Summary

- Year Launched: 2015
- Pricing, Small Nonprofit (1,000 contacts, 3 users): $468/year
- Pricing, Mid-size Nonprofit (20,000 contacts, 10 users): $2,388/year

## System Evaluation

A detailed evaluation of the system against the functionality defined in our rubric in Appendix B is available with the online version of this report at [https://guides.techimpact.org/donor-management-systems/system/eleo/](https://guides.techimpact.org/donor-management-systems/system/eleo/)

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Donation Management** | | | |
| Gift Records | P | D | P * |
| Pledges | M | M | P |
| Recurring Gifts | M | P | D |
| Online Donations | M | D | P |
| Other Gift Types | M | M | D |
| **Constituent Management** | | | |
| Contact Records | M | P | D |
| Householding | D | D | D |
| Online Contact Forms | M | D | D |
| Interactions | M | M | P |
| Groups/Tagging | M | M | D |
| Donor Research | M | M ** | D |
| Duplicate Management | M | M | P |
| **Prospecting & Proposals** | | | |
| Workflow | M | M | D |
| Grant/Proposal Management | N/A | M | D |
| **Communication** | | | |
| Letters | M | M | D |
| Email | M | P | P |
| Content | M | D | D |
| Text Messaging | M | D | D |
| Marketing (Email) Automation | M | D | D |

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Other Interactions** | | | |
| Events | P | M | D |
| Volunteer Management | M | D | D |
| Membership | M | M | D |
| Peer-to-Peer Fundraising | D | D | D |
| **Payments & Accounting Integrations** | | | |
| Payment Processing | M | M | M |
| Transaction Exports/Accounting Integration | M | P | D |
| Reconciliation | M ** | D | D |
| **Search, Queries & Reporting** | | | |
| Search | M | M | D |
| Queries | M | D | D |
| Reports | M | P | P |
| Dashboards | M | M | D |
| **Other Integrations** | | | |
| Integrations | M | M | D |
| APIs | D | D | D |
| **Security, Customization & Configuration** | | | |
| Security | M | D | D |
| Permissions | M | M | M |
| Customization | M | M | D |
| Mobile Access | M | D | D |
| **Training & Support** | | | |
| Training | M | M | M |
| Support | M | M | P |

M Meets P Partially Meets D Does Not Meet

* Certain functionality requires use of a custom field.
** Certain functionality requires an integration with a third-party system.
*** Certain functionality is available for an additional cost.

## eTapestry, by Blackbaud

### www.blackbaud.com/products/blackbaud-etapestry

Blackbaud's eTapestry product continues to focus on delivering a flexible integrated donor management and online fundraising solution to its core market of small to mid-sized nonprofits. A customizable widget-based dashboard provides a snapshot of your fundraising performance that you can use to drill down to the underlying data, as well as links to your favorite reports. Users can also customize their contact records page layout, turning modules on and off as needed and rearranging elements on their screen.

A variety of user-defined field sets allow you to extend the types of information and actions the system supports. You can choose from field sets related to certain types of organizations (arts, education, faith-based, and health care) and database functions (event management, impact measurement, grant tracking, major gifts, membership, moves management, planned giving, and volunteer management). One click imports all the fields from the selected field set into your database for use, along with the relevant queries and reports.

Contact records include support for multiple addresses (including seasonal addresses with dates), relationships, and householding. You can create sections and categories to organize custom fields on the records. The Journal function provides a timeline of all interactions with the contact, including gifts, pledges, communications, event registrations, and outreach, and you can filter these interactions by type of action or time frame.

The system supports a variety of gift types, including in-kind, tribute, stock, real estate, recurring gifts, and pledges. Peer-to-peer fundraising is available via an integration with JustGiving, and this can also be used for virtual events. You can create a variety of online forms, including donation, contact information, volunteer information and hour submission, event registration and ticket sales, and membership payments, and eTapestry recently dropped the 10-form limit for live forms so you can have as many forms running as needed. Transactions are processed using Blackbaud Merchant Services, which charges 2.79 percent plus $0.26 per credit card transaction and a flat fee of $0.75 for each ACH transaction.

Both letters and email communication are supported. Emails can be sent either in "basic" or "advanced" format, with the latter providing access to performance metrics. The system includes a variety of pre-loaded templates that can be customized using drag-and-drop functionality. A step-by-step query builder walks you through the process of creating queries using clear language and also allows you to nest queries for compound segmentation. The system also includes numerous pre-packaged reports, standard accounting report templates for exports to 11 frequently used accounting systems, and a pre-built report to export annual receipts for all donors.

Implementation includes three two-hour onboarding sessions to configure the system and set up the basics. Customers also have access to the system's knowledgebase and a Blackbaud Basic Learn subscription. Additional training packages are available for an extra fee and eTapestry can scope out costs for one-on-one training as needed. Tool tips are available throughout the system and access to chat support is included in the monthly fee. New clients can take advantage of no-fee basic data migration services for simple conversions or, if you are moving from a more complex database, eTapestry has developed standard SOWs for migrations from most systems.

System pricing is based on the number of constituent records in the system and includes unlimited users. Pricing begins at $1,188 for nonprofits with up to 1,000 contacts; organizations with larger databases need to contact the vendor for a custom quote.

## System Summary

- Year Launched: 1999
- Pricing, Small Nonprofit (1,000 contacts, 3 users): $1,188/year
- Pricing, Mid-size Nonprofit (20,000 contacts, 10 users): custom quote

## System Evaluation

A detailed evaluation of the system against the functionality defined in our rubric in Appendix B is available with the online version of this report at https://guides.techimpact.org/donor-management-systems/system/etapestry/

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Donation Management** | | | |
| Gift Records | M | M | P *** |
| Pledges | M | M | P |
| Recurring Gifts | M | M | D |
| Online Donations | M | M | D |
| Other Gift Types | M | M | D |
| **Constituent Management** | | | |
| Contact Records | M | M | D |
| Householding | M | M | P |
| Online Contact Forms | M | M | D |
| Interactions | M | M | M |
| Groups/Tagging | M | M | D |
| Donor Research | M | M | M |
| Duplicate Management | M | M | P |
| **Prospecting & Proposals** | | | |
| Workflow | M | M | D |
| Grant/Proposal Management | N/A | M | D |
| **Communication** | | | |
| Letters | M | P | P |
| Email | M | P | P |
| Content | M | D | D |
| Text Messaging | N/A | M *** | D |
| Marketing (Email) Automation | M | D | D |

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Other Interactions** | | | |
| Events | P | M | P |
| Volunteer Management | M | M *** | D |
| Membership | M | M | D |
| Peer-to-Peer Fundraising | M | D | M |
| **Payments & Accounting Integrations** | | | |
| Payment Processing | M | M | M |
| Transaction Exports/Accounting Integration | M | P | P |
| Reconciliation | M | M | D |
| **Search, Queries & Reporting** | | | |
| Search | M | M | D |
| Queries | M | M | M |
| Reports | M | P | M |
| Dashboards | M | M | D |
| **Other Integrations** | | | |
| Integrations | M | D | D |
| APIs | M | M | D |
| **Security, Customization & Configuration** | | | |
| Security | M | P | M |
| Permissions | M | M | M |
| Customization | M | M | D |
| Mobile Access | M | D | D |
| **Training & Support** | | | |
| Training | M | M | M *** |
| Support | M | M *** | P |

M Meets P Partially Meets D Does Not Meet

* Certain functionality requires use of a custom field.
** Certain functionality requires an integration with a third-party system.
*** Certain functionality is available for an additional cost.

## EveryAction

### everyaction.com

Since the last edition of the Consumers Guide, EveryAction has added a host of new functionality aimed at strengthening its position in the marketplace of systems for growing nonprofits. Today the system brings together strong constituent management and reporting tools with automated workflow features and helpful functionality to help nonprofits manage complex membership programs and grant applications. In broadening its core functionality, however, the system packs a lot of information onto each screen, making it a little more daunting to individuals less comfortable with technology. Users can personalize their dashboard and rearrange sections on constituent records to move the fields or cards they look at most often to the top of the screens.

The system has much to offer organizations looking to expand beyond basic donor management and donation tracking. Multichannel campaign management and reporting allows you to export donor lists to any channel and track your fundraising performance across campaigns to determine which channels and packages are performing best. Pre-built reports allow you to dive deep into your data, with easy access to reports that provide usable insights from complex datasets, such as the ROI of acquisition campaigns. Nonprofits that are looking to expand digital advertising will appreciate the system's social matching capability and integration with Facebook's Ads Manager, which can push a list of contacts directly into a custom audience in Facebook for use in targeted messaging or to create a "lookalike" audience.

Smaller nonprofits can make use of the system's recurring lightbox upsell that asks donors if they would like to convert their one-time gift into a sustainer gift, which helps them to build a stronger base of supporters.

Organizations that use EveryAction's FastAction tool streamline the donation experience for individuals who have previously used any other FastAction form by pre-populating the form with the donor's contact information and/or stored credit card number.

An automated workflow builder with a visual interface helps you create triggered messaging campaigns, such as a welcome series, and moves management plans to cultivate donors. A grant application management workflow with status tracking and automated task assignment is built into organization records, allowing you to track the creation of grant applications and steward the grants after they are received. A straightforward query builder allows you to develop a list using virtually any field in the database and shows you the running total of results as you add new filters and save the results as a static or dynamic list.

The base package for the system includes donor management, online fundraising, basic advocacy, and basic volunteer management. It also includes free phone and email support. In addition, EveryAction support is staffed all night long on important giving days, such as Giving Tuesday and New Year's Eve, to monitor traffic and address any issues, such as protecting against organization site crashes by diverting traffic to a separately hosted donation form if there is overwhelming response.

Pricing is based on the number of contacts in the database and includes an unlimited number of users. New customers can use EveryAction's self-service onboarding tools for free or can opt for a $1,500 "Getting Started" package that includes training and data migration. Yearly pricing for the base package starts at $1,308 for organizations with up to 1,000 contact records. Organizations with 20,000 contact records can expect to pay $5,388 per year for the base package.

## System Summary

- Year Launched: 1997
- Pricing, Small Nonprofit (1,000 contacts, 3 users): $1,308/year
- Pricing, Mid-size Nonprofit (20,000 contacts, 10 users): $5,388/year

## System Evaluation

A detailed evaluation of the system against the functionality defined in our rubric in Appendix B is available with the online version of this report at [https://guides.techimpact.org/donor-management-systems/system/everyaction-development/](https://guides.techimpact.org/donor-management-systems/system/everyaction-development/)

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Donation Management** | | | |
| Gift Records | M | M | P |
| Pledges | M | M | M |
| Recurring Gifts | M | M | M *** |
| Online Donations | M | M | M |
| Other Gift Types | M | M | M |
| **Constituent Management** | | | |
| Contact Records | M | M *** | P |
| Householding | M | M | P |
| Online Contact Forms | M | M | M |
| Interactions | M | M | M |
| Groups/Tagging | M | M | M |
| Donor Research | M | M ** | D |
| Duplicate Management | M | M | M |
| **Prospecting & Proposals** | | | |
| Workflow | M | M | M |
| Grant/Proposal Management | N/A | M | M |
| **Communication** | | | |
| Letters | M | M | M |
| Email | P | P | M |
| Content | M | M | M |
| Text Messaging | N/A | D | M |
| Marketing (Email) Automation | M | M | M |

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Other Interactions** | | | |
| Events | P | M | P |
| Volunteer Management | M | D | M |
| Membership | M | M | P |
| Peer-to-Peer Fundraising | M | D | D |
| **Payments & Accounting Integrations** | | | |
| Payment Processing | M | M | M |
| Transaction Exports/Accounting Integration | M | P | P |
| Reconciliation | M | M | M |
| **Search, Queries & Reporting** | | | |
| Search | M | M | D |
| Queries | M | M | D |
| Reports | M | M | M |
| Dashboards | M | M | D |
| **Other Integrations** | | | |
| Integrations | M | M | D |
| APIs | M | M | M |
| **Security, Customization & Configuration** | | | |
| Security | M | M | M |
| Permissions | M | M | M |
| Customization | M | M | D |
| Mobile Access | M | D | D |
| **Training & Support** | | | |
| Training | M *** | M | M *** |
| Support | M | M | P |

M Meets P Partially Meets D Does Not Meet

* Certain functionality requires use of a custom field.
** Certain functionality requires an integration with a third-party system.
*** Certain functionality is available for an additional cost.

## Keela

### keela.co

With a clean design and a straightforward, easy-to-use interface, Keela provides donor management and online fundraising tools that are accessible to less tech savvy nonprofit staff. A flexible tagging system allows you to categorize contact records in just about any way that works for your organization, and you can auto-apply tags based on actions taken within the system. An Insights tool built using Artificial Intelligence uses data from the system to determine a donor engagement score based on a constituent's financial and social engagement with the organization, the constituent's readiness to give a donation, and even a "Smart Ask" amount that a constituent is likely to give that you can use in communications with the donor and on donation forms. Constituents can be added to households, but the functionality related to householding is limited to being able to see a giving roll-up of all household members. The system supports both pledges and recurring donations, and recurring donors are automatically emailed a receipt that summarizes their giving at the end of the year.

The system is primarily focused on facilitating online communication and giving. While you can create PDF donation receipt templates in the system, all other offline communication is conducted outside the system using a .CSV of constituent information that you can merge into letters you create in a word processing program. You would have to manually create an interaction and attach a letter to that interaction to store it in the database, but the system does provide the ability to do this in bulk for a list of individuals. You can create and send emails within the system using an email tool that features a user-friendly drag-and-drop editor, and those emails are recorded as interactions on constituent records.

There are a number of frequently used pre-built reports in the system that include graphs and charts to display data visually and the system also includes a custom report builder that allows you to create and save your own reports. A Fundraising Snapshot page tracks gifts you receive against your goals and against Key Performance Indicators (KPIs) that you can set up in the system. Keela also provides organizations with the ability to download a comprehensive fundraising report that summarizes fundraising data, including giving history, recurring donors, gift sizes, and retention and acquisition rates.

The system integrates with Stripe and PayPal for payment processing. It also includes an integration with QuickBooks Online for accounting, and users of other accounting systems can export transaction reports. An integration with Eventbrite allows you to import events created and managed in their system into your database. The system does include the ability to manage membership programs, including accepting payments and renewals and supporting multiple membership types (you can also set memberships to auto-renew on their expiration date). In addition, you can track volunteer interests and hours within the system. The system does not include volunteer scheduling.

Clients receive access to the system's knowledgebase, which includes a variety of training videos and information, as well as unlimited email support. Keela offers free self-serve implementation for new clients, with videos and documentation that will walk you through setup and data migration, or will provide technical assistance to new clients at a rate of $100 per hour with a four-hour minimum.

Pricing is based on the number of contacts in the system and includes all modules and integrations, as well as an unlimited number of users, beginning at $588 per year. A nonprofit with 1,000 contacts can expect to pay $1,068 per year, whereas one with 20,000 contacts would pay $4,788 per year.

### System Summary

- Year Launched: 2015
- Pricing, Small Nonprofit (1,000 contacts, 3 users): $1,068/year
- Pricing, Mid-Size Nonprofit (20,000 contacts, 10 users): $4,788/year

### System Evaluation

A detailed evaluation of the system against the functionality defined in our rubric in Appendix B is available with the online version of this report at https://guides.techimpact.org/donor-management-systems/system/keela/

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Donation Management** | | | |
| Gift Records | P | M | D |
| Pledges | M | D | D |
| Recurring Gifts | D | P | D |
| Online Donations | M | M | M |
| Other Gift Types | M | M | D |
| **Constituent Management** | | | |
| Contact Records | P * | P * | P |
| Householding | M | D | D |
| Online Contact Forms | M | M | D |
| Interactions | M | M | P |
| Groups/Tagging | M | M | M |
| Donor Research | D | D | D |
| Duplicate Management | M | M | P |
| **Prospecting & Proposals** | | | |
| Workflow | M | M | D |
| Grant/Proposal Management | N/A | M | D |
| **Communication** | | | |
| Letters | P | D | D |
| Email | M | M | P |
| Content | M | D | D |
| Text Messaging | M | D | D |
| Marketing (Email) Automation | M | D | D |

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Other Interactions** | | | |
| Events | P | D | D |
| Volunteer Management | M * | D | D |
| Membership | M | M | P |
| Peer-to-Peer Fundraising | D | D | D |
| **Payments & Accounting Integrations** | | | |
| Payment Processing | M | M | M |
| Transaction Exports/Accounting Integration | M | D | D |
| Reconciliation | M ** | D | D |
| **Search, Queries & Reporting** | | | |
| Search | M | M | D |
| Queries | M | D | M |
| Reports | M | M | D |
| Dashboards | M | M | D |
| **Other Integrations** | | | |
| Integrations | M | M | D |
| APIs | D | D | D |
| **Security, Customization & Configuration** | | | |
| Security | P | P | D |
| Permissions | M | D | D |
| Customization | M | P | D |
| Mobile Access | M | D | D |
| **Training & Support** | | | |
| Training | P | P | D |
| Support | M | D | P |

M Meets P Partially Meets D Does Not Meet

* Certain functionality requires use of a custom field.
** Certain functionality requires an integration with a third-party system.
*** Certain functionality is available for an additional cost.

## Kindful

### Kindful.com

Kindful combines a clean, approachable design with solid donor management and online fundraising capabilities, a user-friendly reporting tool, and numerous pre-built integrations. Online forms are easy to create and can be shared: as a page hosted on the Kindful servers; displayed via a plugin on Wordpress, Squarespace, or Wix websites; or added to your own website via embed code. Donors have access to a portal that allows them to manage their own information and update credit cards saved on their account. A tax summary tool allows you to easily generate and email a summary of all gifts a donor has made in the previous year to all donors with email addresses in the system. Kindful comes with a variety of pre-built reports, or you can create your own custom report. Reports are created first by building a query of the data you want to see, with results updating dynamically as you add filters to your search, and then selecting the columns you want to include on the report. Reports can be exported as .CSV or PDF files, saved, and scheduled to be run at a later time or at specified intervals.

There are some limitations to help maintain the simplicity of the system. A dashboard provides a snapshot of donor and fundraising performance, but it cannot be customized by user. By default, contact records can only track one mailing address (although you can add custom fields to capture additional addresses). Contacts can be added to groups—while you can create as many groups as you want, the system only supports static groups at this time. The system supports pledges, but they can only be saved with a single due date. You cannot create an installment schedule unless you set it up as multiple pledges, but individual payments can be applied to a pledge or a recurring transaction can be set up to apply to a single pledge.

The system provides the ability to send individual and batch letters and emails. You can send marketing emails via an integration with either MailChimp, Constant Contact, or Emma, and bring performance metrics back into the system to be logged on contact records. An integration with DonorSearch provides basic wealth data on each donor record, and there is an additional service level offered that pulls in full wealth profiles sold by number of look ups. The system integrates with Stripe, Authorize.net, and PayPal for online transactions, or you can choose to use Kindful Payments, which charges 2.9 percent plus $0.30 per transaction for credit cards and 1 percent plus $0.30 per transaction for ACH payments. Kindful Payments does include a service that automatically updates expiring credit cards in the system, which helps avoid payment failures for recurring transactions. You can export transactions to your accounting system with a scheduled recurring transaction report, or you can use a pre-built integration with QuickBooks.

More than 45 integrations in the areas of fundraising, event management, advocacy, and payment processing are available to extend the functionality of the system. There are no additional fees to add any integrations to your account, other than subscription fees for your Kindful account and any subscription fees for the third-party system. In addition, Kindful provides an open API that allows developers to create custom integrations.

The initial implementation fee for new clients is $199, and you have the opportunity to select either a full onboarding package to assist with data migration or a training package. Subscription pricing is based on the number of contacts in the system and includes unlimited users, unlimited donation pages, and unlimited phone and email support. Pricing starts at $1,200 per year for systems with up to 1,000 contacts. Organizations with 20,000 contacts can expect to pay $4,800 per year.

## System Summary

- Year Launched: 2012
- Pricing, Small Nonprofit
  (1,000 contacts, 3 users): $1,200/year
- Pricing, Mid-size Nonprofit
  (20,000 contacts, 10 users): $4,800/year

## System Evaluation

A detailed evaluation of the system against the functionality defined in our rubric in Appendix B is available with the online version of this report at https://guides.techimpact.org/donor-management-systems/system/kindful/

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Donation Management** | | | |
| Gift Records | M | P | M * |
| Pledges | D | M | D |
| Recurring Gifts | M | M | M |
| Online Donations | M | M | P |
| Other Gift Types | M | M | D |
| **Constituent Management** | | | |
| Contact Records | M * | P */*** | P * |
| Householding | M | M | P |
| Online Contact Forms | M | M | M |
| Interactions | M | M | M |
| Groups/Tagging | M * | D | D |
| Donor Research | M | M | D |
| Duplicate Management | M | M | P |
| **Prospecting & Proposals** | | | |
| Workflow | M * | M | D |
| Grant/Proposal Management | N/A | M | D |
| **Communication** | | | |
| Letters | M | P | P |
| Email | M | P | M ** |
| Content | M | D | D |
| Text Messaging | N/A | M | M |
| Marketing (Email) Automation | M | D | D |

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Other Interactions** | | | |
| Events | M | P | P ** |
| Volunteer Management | P * | P | D |
| Membership | D | D | D |
| Peer-to-Peer Fundraising | M | M | M |
| **Payments & Accounting Integrations** | | | |
| Payment Processing | M | M | M |
| Transaction Exports/Accounting Integration | M | M | P |
| Reconciliation | M * | M ** | D |
| **Search, Queries & Reporting** | | | |
| Search | M | M | D |
| Queries | M | M | D |
| Reports | M | P | P |
| Dashboards | M | D | D |
| **Other Integrations** | | | |
| Integrations | M | M | M |
| APIs | M | M | M |
| **Security, Customization & Configuration** | | | |
| Security | M | P | M |
| Permissions | M | D | D |
| Customization | M | P | D |
| Mobile Access | M | D | D |
| **Training & Support** | | | |
| Training | M | P | M *** |
| Support | M | M | P |

M Meets     P Partially Meets     D Does Not Meet

* Certain functionality requires use of a custom field.
** Certain functionality requires an integration with a third-party system.
*** Certain functionality is available for an additional cost.

## Little Green Light

**www.littlegreenlight.com**

Little Green Light provides nonprofits with solid donor management and online fundraising tools in an affordable package. Entering gifts is straightforward, with both a single gift and bulk gift entry forms. You can create pledges in the system and customize the pledge installments, and the system will prompt you to apply a gift to an open pledge if one exists. Recurring gifts cannot be entered directly into the system—they need to be entered using one of your online donation forms and you will need to set up the form to pass a recurring donor tag to a constituent record to be able to track these donors in your system. The gifts will process automatically via the payment processor at the specified intervals, but you will need to manually access reports on expiring credit cards and ask donors to update their information.

Constituent profiles are neatly laid out in sections that you can expand or collapse, and include a color-coded, searchable timeline of all interactions. While the system does not include householding functionality, you can designate a "Spouse/Partner" (as well as other relationships) that can be used to generate labels and salutations and who also will appear in the Soft Credit section of gift entry forms. Little Green Light includes an integration with DonorSearch (which requires an additional subscription) that allows you to import wealth data and prospect ratings into constituent records. You can use "goals" to set up and assign donor cultivation tasks, but this is managed manually, rather than through automated workflows.

You can batch and send letter and email acknowledgements through the system. While you can send emails natively through the system, the vendor recommends using its integration with either Constant Contact or MailChimp for large broadcast sends.

The system integrates with three payment processors—Stripe, PayPal, and ProPay—and Little Green Light charges an additional 1 percent processing fee per transaction (capped at $50 per month) on top of payment processor fees. You can add an option to online forms to allow donors to cover the processing fee costs. You can export transactions for your accounting system, and since the last edition of the Consumers Guide, Little Green Light has added an integration with QuickBooks Online that allows you to reconcile and lock transactions after they are passed to the accounting system.

A widget-based dashboard provides access to key metrics and reports and you can drill down to access detailed data. The system includes a query builder, a number of pre-built reports, and a custom report builder, and you can export query results and reports. A native event management module allows you to track registrations, guests, and table assignments, and the system also includes basic volunteer and membership management tools. Additional third-party integrations are available with WuFoo, Fundraising Report Card, Zapier, and others.

System implementation for new clients is primarily self-service, but Little Green Light provides a library of training videos, regular Q&A webinars, and documentation, as well as email support for all clients. There is also a private Facebook group for system users to connect and share questions and best practices and an external LGL Consultant Network for fee-based support.

Pricing is based on the number of contact records in the database and includes unlimited users. An organization with 1,000 contacts could expect to pay $421 per year (plus up to $600 in transaction fees), while an organization with 20,000 contacts could expect to pay $745 per year (plus up to $600 in transaction fees).

## System Summary

- Year Launched: 2009
- Pricing, Small Nonprofit (1,000 contacts, 3 users): $421/year (plus up to $600 in transaction fees)
- Pricing, Mid-size Nonprofit (20,000 contacts, 10 users): $745/year (plus up to $600 in transaction fees)

## System Evaluation

A detailed evaluation of the system against the functionality defined in our rubric in Appendix B is available with the online version of this report at https://guides.techimpact.org/donor-management-systems/system/little-green-light/

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Donation Management** | | | |
| Gift Records | M | M | D |
| Pledges | M | M | P |
| Recurring Gifts | M | M | M ** |
| Online Donations | M | M | P |
| Other Gift Types | M | M * | M * |
| **Constituent Management** | | | |
| Contact Records | M | M *** | D |
| Householding | D | P | M |
| Online Contact Forms | M | M | D |
| Interactions | M | M | M |
| Groups/Tagging | M | M | D |
| Donor Research | M | M ** | D |
| Duplicate Management | M | M | P |
| **Prospecting & Proposals** | | | |
| Workflow | M | M | D |
| Grant/Proposal Management | N/A | M | D |
| **Communication** | | | |
| Letters | M | M | M |
| Email | P ** | M | P ** |
| Content | M | D | D |
| Text Messaging | M | D | D |
| Marketing (Email) Automation | M | D | D |

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Other Interactions** | | | |
| Events | P | M | P |
| Volunteer Management | M * | P | D |
| Membership | M | M | P |
| Peer-to-Peer Fundraising | D | D | D |
| **Payments & Accounting Integrations** | | | |
| Payment Processing | M | M | M |
| Transaction Exports/Accounting Integration | M | P | P |
| Reconciliation | M ** | M ** | D |
| **Search, Queries & Reporting** | | | |
| Search | M | M | D |
| Queries | M | M | D |
| Reports | M | P | P |
| Dashboards | M | M | D |
| **Other Integrations** | | | |
| Integrations | M | M | D |
| APIs | M | M | D |
| **Security, Customization & Configuration** | | | |
| Security | P | P | D |
| Permissions | M | D | D |
| Customization | M | M | D |
| Mobile Access | D | D | D |
| **Training & Support** | | | |
| Training | M | P | D |
| Support | P | D | P |

M Meets     P Partially Meets     D Does Not Meet

* Certain functionality requires use of a custom field.
** Certain functionality requires an integration with a third-party system.
*** Certain functionality is available for an additional cost.

## NeonCRM

### www.neoncrm.com

NeonCRM is a flexible system that provides solid support for fundraising and donor management along with the ability to manage volunteers, events, membership programs, peer-to-peer fundraising, e-commerce, and grants. Individual users can customize numerous aspects of their experience, from an extensive widget-based dashboard to the configuration of constituent profile screens to the order of items in their navigation menu.

Contact records include the ability to track multiple addresses, relationships, and households, as well as a timeline of all interactions that you can filter by activity. The system supports donations, pledges, in-kind and stock gifts, recurring donations, tributes, memberships, and peer-to-peer fundraising. Donations made online are automatically added to the database. A portal, available to organizations subscribed to the Essentials tier or higher, allows constituents to update their contact information, add or update their credit card numbers, log volunteer actions, and more. The membership tool allows you to manage complex multi-level membership programs, track member benefits and credentials, and provide access to a member portal that can display or hide content depending on member type.

A sophisticated workflow automation tool allows organizations to send triggered communications or update records in the database based on a number of actions and events. The system includes a native email tool, and also integrates with MailChimp and Constant Contact. An integration with QuickBooks streamlines the transfer of transactions to the accounting system. Other integrations facilitate nightly NCOA updates, wealth screening, event ticketing, and text messaging.

NeonCRM includes more than 50 standard reports in addition to executive reports that provide analysis of donor retention and reactivation and other Fundraising Effectiveness Project criteria, and also allows you to build your own custom reports. NeonPay, the primary payment processor supported by the system, is included with all subscription packages and processes transactions at a rate of 2.9 percent plus $0.30 per transaction (3.9 percent for American Express transactions).

New clients are able to access the free Neon One Academy—where they can learn about the software and earn badges—as well as a support center and guides. Web chat-based support allows you to submit a ticket from within the platform and you also have the ability to flag pages that contain content you don't understand. Higher level plans include phone support.

NeonCRM offers four tiers of pricing with increasing access to additional modules, advanced functionality, and training and support. Pricing within the tiers is based on the number of records in the system and includes unlimited users. The entry-level tier, Essentials Light, is for nonprofits with fewer than 500 records, and is $588 per year. Organizations with 1,000 contacts can expect to pay between $1,188 and $3,588 per year, depending on the package selected. Organizations with 20,000 contacts can expect to pay between $7,788 and $9,588 per year.

### System Summary

- Year Launched: 2004
- Pricing, Small Nonprofit (1,000 contacts, 3 users): $1,188-$3,588/year
- Pricing, Mid-size Nonprofit (20,000 contacts, 10 users): $7,788-$9,588/year

### System Evaluation

A detailed evaluation of the system against the functionality defined in our rubric in Appendix B is available with the online version of this report at [https://guides.techimpact.org/donor-management-systems/system/neon-crm/](https://guides.techimpact.org/donor-management-systems/system/neon-crm/)

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Donation Management** | | | |
| Gift Records | M | D | M * |
| Pledges | M | M | M |
| Recurring Gifts | M | M | M |
| Online Donations | M | M | P |
| Other Gift Types | M | M | D |
| **Constituent Management** | | | |
| Contact Records | M | M *** | D |
| Householding | M | P | M |
| Online Contact Forms | M | M | M |
| Interactions | M | M | M |
| Groups/Tagging | M | M | M |
| Donor Research | M | M | M |
| Duplicate Management | M | M | M |
| **Prospecting & Proposals** | | | |
| Workflow | M | M | M |
| Grant/Proposal Management | N/A | M | M |
| **Communication** | | | |
| Letters | M | P | P |
| Email | M | P | P |
| Content | M | M | D |
| Text Messaging | N/A | M | D |
| Marketing (Email) Automation | M | M | M |
| **Other Interactions** | | | |
| Events | M | M | P |
| Volunteer Management | M | M | D |
| Membership | M | M | M |
| Peer-to-Peer Fundraising | M | M | M |

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Payments & Accounting Integrations** | | | |
| Payment Processing | M | M | M |
| Transaction Exports/Accounting Integration | M | M | D |
| Reconciliation | M | M ** | M ** |
| **Search, Queries & Reporting** | | | |
| Search | M | M | M |
| Queries | M | M | D |
| Reports | M | P | P |
| Dashboards | M | M | M |
| **Other Integrations** | | | |
| Integrations | M | M | D |
| APIs | M | M | M |
| **Security, Customization & Configuration** | | | |
| Security | M | M | M |
| Permissions | M | M | M |
| Customization | M | M | D |
| Mobile Access | M | M | M *** |
| **Training & Support** | | | |
| Training | M | M | M |
| Support | M | M *** | P |

M Meets    P Partially Meets    D Does Not Meet

* Certain functionality requires use of a custom field.
** Certain functionality requires an integration with a third-party system.
*** Certain functionality is available for an additional cost.

## Salesforce Nonprofit Success Pack

Salesforce's Nonprofit Success Pack (NPSP) is part of the company's Nonprofit Cloud offerings and adapts the sophisticated power of the for-profit Salesforce platform to meet the needs of nonprofit organizations. Earlier this year, Salesforce rolled out a new suite of tools for its Nonprofit Cloud that extends the donation management and online fundraising functionality, some of which is available for free and some that is available for an additional cost. The recently-released tools focus on improving connections between Salesforce and accounting systems, streamlining online giving and payments, simplifying gift entry, and improving the quality of data in the system.

The highly-configurable dashboards available in the system provide you with a visual snapshot of program, fundraising, and campaign performance and you can drill down to see the underlying data that comprise the many charts and graphs. NPSP comes with a variety of popular fundraising reports and also includes a powerful custom report and dashboard builder. The new Salesforce.org Elevate product suite (available for an additional cost) includes a Payment Services platform that integrates your online payment gateways with NPSP to make it easier to collect online donation payments, and Giving Pages, which provides nonprofits with a donation form that integrates with the Payment Services platform and NPSP so that online donations are seamlessly transferred into the CRM.

The system continues to support a variety of gift types, including in-kind donations, tribute gifts, pledges, and recurring donations. Engagement plans allow you to create automated moves management workflows for donor cultivation. The platform also supports volunteer management and membership programs. The new Accounting Subledger, available for an additional cost, includes pre-built templates for connecting NPSP with a variety of popular accounting systems.

NPSP includes a built-in email tool that allows you to send up to 5,000 emails at a time, and larger marketing email sends are possible with additional integrated email and multi-channel marketing products. (These tools, Marketing Cloud and Pardot, are available at an additional cost). The Marketing Cloud add-ons include a powerful drag-and-drop visual process builder for marketing automations and their Einstein Engagement Scoring, which is an AI-based predictive analytics tool to help optimize your email campaigns. Additional functionality is also available through the Salesforce AppExchange, which has an entire section dedicated to nonprofit-focused apps. Salesforce's developer platform and APIs also provide the ability for custom-developed solutions.

The flexibility, configurability, and power of Salesforce provides a great deal of potential, but it requires training to set up and customize the system for your needs and can pose challenges for non-technical users new to the system. Salesforce's Trailhead system provides training for users at all levels to help increase knowledge of and comfort with the system. A large variety of partners provide implementation services for new customers, with different levels of pricing and support.

The NPSP is free to add to your Salesforce setup, but you'll need Salesforce licenses to use it. Any 501(c)3 may qualify, and Salesforce will provide your first 10 subscriptions free. Additional licenses for the Sales Cloud Enterprise Edition are available at a cost of $432 per year. Add-ons for extended functionality described above (Salesforce.org Elevate, Accounting Subledger, Marketing Cloud, and Pardot) have additional licensing costs, as well.

## System Summary

- Year Launched: 2007
- Pricing, Small Nonprofit (1,000 contacts, 3 users): $0
- Pricing, Mid-size Nonprofit (20,000 contacts, 10 users): $0

## System Evaluation

A detailed evaluation of the system against the functionality defined in our rubric in Appendix B is available with the online version of this report at https://guides.techimpact.org/donor-management-systems/system/salesforce-nonprofit-success-pack/

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Donation Management** | | | |
| Gift Records | M | M | M |
| Pledges | M | D | P |
| Recurring Gifts | M | P*** | M |
| Online Donations | M*** | M*** | P*** |
| Other Gift Types | M | M | D |
| **Constituent Management** | | | |
| Contact Records | M | M*** | M*** |
| Householding | M | M | M |
| Online Contact Forms | M | M | M*** |
| Interactions | M | M | M |
| Groups/Tagging | M | M | M |
| Donor Research | M*** | M | M** |
| Duplicate Management | M | M | M |
| **Prospecting & Proposals** | | | |
| Workflow | M | M | M |
| Grant/Proposal Management | N/A | M | M |
| **Communication** | | | |
| Letters | P | M** | M** |
| Email | P | M*** | M*** |
| Content | M | M | M |
| Text Messaging | N/A | M*** | M*** |
| Marketing (Email) Automation | M | M*** | M*** |

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Other Interactions** | | | |
| Events | M** | M** | M** |
| Volunteer Management | M | M | M |
| Membership | M | M | M*** |
| Peer-to-Peer Fundraising | M | D | M** |
| **Payments & Accounting Integrations** | | | |
| Payment Processing | M | M | M |
| Transaction Exports/Accounting Integration | M | M*** | M*** |
| Reconciliation | M | M | M |
| **Search, Queries & Reporting** | | | |
| Search | M | M | M |
| Queries | M | M | M |
| Reports | M | M | M |
| Dashboards | M | M | M |
| **Other Integrations** | | | |
| Integrations | M | M | M |
| APIs | M | M | M |
| **Security, Customization & Configuration** | | | |
| Security | M | M*** | M |
| Permissions | M | M | M |
| Customization | M*** | M*** | M |
| Mobile Access | M | M | M |
| **Training & Support** | | | |
| Training | M*** | M | M*** |
| Support | M | M | M |

M Meets P Partially Meets D Does Not Meet

* Certain functionality requires use of a custom field.
** Certain functionality requires an integration with a third-party system.
*** Certain functionality is available for an additional cost.

# APPENDIX A: METHODOLOGY

The research for this report followed a five-step process:

### 1. Identify Inclusion Criteria

We began the process by reaching out to Subject Matter Experts (SMEs) who assist nonprofits with the selection of donor management software to solicit input on the criteria we use to select the systems for inclusion in this report. Based on their feedback, we developed the following criteria that a system must meet in order to be included in this edition of the Consumers Guide:

- The system offers a cloud-based subscription option.
- The system is intended for use by small organizations as their only database to manage online and offline fundraising activities, donors, and supporters.
- An organization with three users and 1,000 constituent records could purchase it for less than $10,000 in the first year, including yearly subscription costs, implementation costs, and data migration costs.
- More than 100 North American-based nonprofit organizations are current active users of the system.
- The system allows nonprofits to:
  - Easily view and update contact information and all interactions on a constituent record.
  - Create a variety of online forms (donation, event, questionnaire, etc.).
  - Process online payments via a native payment gateway or a pre-existing integration with a third-party payment gateway.
  - Create and collect data from email marketing campaigns, either via a native tool or through a pre-existing integration with a third-party tool.
  - Manage and report on both online and direct mail fundraising campaigns.
  - Track fundraising metrics on a dashboard.
  - Export transaction data in a format compatible with accounting software.

### 2. Define Vendors to Be Included

Based on a preliminary scan of the marketplace, we developed a list of 47 systems that were potential fits for the report. We distributed invitations to vendors to fill out a preliminary survey about their systems, pricing, number of clients, and key features in order to be considered for inclusion. We emailed the invitation directly to individual contacts at all vendors included in the last edition of the report, vendors who have contacted Tech Impact since that edition to let us know they'd like to be included, and vendors who were already known to Tech Impact staff or the SMEs listed in Appendix C: Authors and Contributors. We reached out to vendors for whom we did not have an email contact via general inquiry forms or email addresses listed on their website, messages to the software's Facebook page administrator, or messages to the sales or marketing staff via LinkedIn. We sent multiple reminder emails or messages to follow up with vendors who did not respond to our initial inquiries.

In all, 33 vendors responded to our inclusion survey. From those, we identified 23 systems that met our criteria.

*NOTE*: This list of vendors was created completely independently from the process of soliciting any vendor for funding. We employ a "firewall" by which our fundraising staff works without any visibility to the research staff, and vice versa, and without coordination.

### 3. Update Evaluation Criteria

In April and May 2020, Tech Impact Idealware solicited feedback from SMEs, nonprofit fundraising staff, and representatives of vendors selected as "best value systems" in our 2017 report to seek their input on useful changes and additions to the criteria we used to review the systems in the 2017 report. We also looked at feedback from readers as to how they used the information in the report and held internal conversations about the report's structure and how to better convey our intentions about how the report should be used. Based on this input and the internal conversations, we restructured the evaluation criteria and added new considerations to take into account in system reviews.

### 4. Complete Summary Reviews

In June and July 2020, Tech Impact Idealware conducted half-hour demos of all 23 systems identified from the preliminary survey to include in this report. Each vendor was sent a list of high-level tasks to be demonstrated, which were designed to investigate the factors most often identified as critical to a nonprofit's fundraising program. Based on these summary reviews, we sorted the systems into 12 use case categories and wrote a paragraph summarizing each system's features.

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.

### 5. Identify the Use Case Representatives

We selected one system from each of our 12 use cases to review in more detail. Representative systems were chosen based on the strength of their functionality related to the use case, overall strength as a fundraising system, ease of use, and position in the marketplace.

### 6. Complete Extended Reviews

For each of those 12 systems, we conducted 90-minute demos, during which we reviewed each system against the functionality listed in the evaluation rubric. 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.

The new evaluation rubric (detailed in the next appendix), looks at 41 core functions, divided into 10 categories. Our extended profiles detail the systems' key strengths and weaknesses in each of the 10 categories. Each function has specific criteria sorted into three levels: Standard, Enhanced, and Advanced. For each function and level, systems receive one of the following ratings: Does Not Meet, Partially Meets, Meets.

# APPENDIX B: HOW WE EVALUATED THE SYSTEMS

As noted in Appendix A, Tech Impact has made some significant changes to the evaluation criteria in response to feedback from a variety of sources. The following criteria are categorized according to the frequency with which the functionality is found in systems of the type that are profiled in this report.

Functionality in the “Standard” column can be found in most systems in today’s market. “Enhanced” functionality is not quite as universal, but is frequently seen. “Advanced” functionality is only occasionally available in these types of systems.

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Donation Management** | | | |
| **Gift Records** | • Quick/Bulk entry<br>• Import gifts from spreadsheet<br>• Fund/campaign/appeal tracking<br>• Soft credits<br>• Notes | • Attach Document to Gift Record | • Assign/Track Premiums<br>• Seamless integration to matching services |
| **Pledges** | • Create Payment Schedule<br>• Customize Payment Schedule | • Prompt if open pledge | • Add credit card to pledge<br>• Auto-remind donor of upcoming pledge |
| **Recurring Gifts** | • Manually run report on expiring credit cards | • Auto-process recurring payments<br>• Automatically run report on expiring credit cards | • Auto-update expiring credit cards |
| **Online Donations** | • Online donation forms | • Online donations are automatically added to database | • Allow donors to cover processing fees<br>• Personalized giving arrays |
| **Other Gift Types** | • Honor/Tribute<br>• In-Kind Gifts | • Stock Gifts | • Cryptocurrency gifts |

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Constituent Management** | | | |
| **Contact Records** | • Track multiple addresses<br>• Track communications preferences<br>• Do Not Contact/ Deceased<br>• Track relationships | • Use seasonal addresses for mailings<br>• Automatic NCOA updates<br>• Add social media profile links<br>• Track donor source | • Engagement scoring<br>• Track social media posts |
| **Householding** | • Create household records with giving roll-ups | • Use household information for mailings<br>• Household totals show on individual record | • Track household salutations<br>• Auto-soft credits other individuals in households based on relationship |
| **Online Contact Forms** | • Collect contact information online | • Online contact forms automatically update records | • Constituent portal for self-service |
| **Interactions** | • View some types of interactions<br>• Log offline interactions | • View all interactions on constituent profile<br>• Store system-generated letters and emails | • Filter interactions by type<br>• Add emails sent outside the system to constituent records |
| **Groups/Tagging** | • Add tags to constituent records<br>• Add constituents to static groups | • Add constituents to dynamic groups | • Automatically add tags to constituent records based on actions taken |
| **Donor Research** | • Integrate with wealth screening tool | • Prospect ratings | • Automatic donor profile searches and updates |
| **Duplicate Management** | • Manually run duplicate record checks<br>• Duplicate record deletion | • Automatic duplicate checking on import/ record creation<br>• Duplicate record merges | • Automatic system-wide duplicate record checks<br>• Field-by-field merge option |

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Prospecting & Proposals** | | | |
| **Workflow** | • Assign status/ priority to constituent<br>• Assign staff contact | • Manually assign/ track tasks | • Automated task assignments<br>• Universal workflow tool |
| **Grant/Proposal Management** | • No grant/proposal management functionality | • Track grant proposals using manual workflow | • Grant proposal management module with automatic workflow |
| **Communication** | | | |
| **Letters** | • Generate individual letters<br>• Generate letters in batches<br>• Download file for labels and envelopes<br>• Create letter templates in system<br>• System includes pre-built letter templates | • Merge and print labels and envelopes<br>• One-click logging to constituent profile<br>• Integration with Word, Google Docs<br>• Automatic batching of email and letter receipts | • Save personalized letters on constituent records<br>• Automatic logging to constituent profile |
| **Email** | • Send individual emails<br>• Track unsubscribes<br>• Create email templates within system<br>• System includes pre-built email templates | • Send broadcast emails via one-way integration with a third-party system<br>• View email performance metrics<br>• Drag-and-drop email editing tool | • Send broadcast emails natively or via two-way integration with a third-party system<br>• Log email performance metrics to contact records<br>• Facilitate A/B testing<br>• Upload externally-created email templates to system |
| **Content** | • Merge fields | • Conditional content | • Calculated fields |
| **Text Messaging** | • No text messaging capability | • Text messaging via third-party integration | • Native text messaging |
| **Marketing (Email) Automation** | • Autoresponder emails | • Triggered emails | • Triggered email series with automated workflow |

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Other Interactions** | | | |
| Events | • Event tracking via third-party integration<br>• Event registration tracking<br>• Online event registration and/or ticket sales | • Event tracking native to system<br>• Event attendance tracking<br>• Track guests<br>• Assign tables | • Onsite check-in<br>• Onsite payments<br>• Generate name tags and/or table tents<br>• Assigned seating |
| Volunteer Management | • Track volunteer interests and skills<br>• Track volunteer hours<br>• Online volunteer information forms | • Volunteer scheduling via third-party integration<br>• Online volunteer hour submission forms | • Native volunteer scheduling |
| Membership | • Accept membership payments<br>• Accept renewal payments<br>• Specify expiration dates | • Multiple membership levels/ types | • Auto-renewals<br>• Grace periods<br>• Manage member benefits/credentials<br>• Member portal with gated benefits |
| Peer-to-Peer Fundraising | • Peer-to-peer fundraising via third-party integration | • Peer-to-peer fundraising native to system | • Manage teams |
| **Payments & Accounting Integrations** | | | |
| Payment Processing | • Payment processing via native tool or integration | • Ability to choose from multiple payment processors | • Ability to set up multiple payment processors |
| Transaction Exports/ Accounting Integration | • Export transactions | • Vendor will create a custom report to export transactions for Accounting<br>• Pre-built integration with one accounting system | • Schedule recurring transaction report exports<br>• Pre-built integrations with multiple accounting systems |
| Reconciliation | • Mark transaction records as passed to accounting | • Mark transaction records as reconciled with accounting and lock records | • Pass adjusted transactions on to accounting |

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| **Search, Queries & Reporting** | | | |
| **Search** | • Basic search | • Global search<br>• Partial term matching | • Soundex/fuzzy search |
| **Queries** | • Basic query builder | • Advanced query builder | • Visual query builder or query builder wizard |
| **Reports** | • Pre-built standard reports<br>• Export report data | • Custom report builder<br>• Save reports<br>• Add graphs and charts to reports | • Schedule reports<br>• Mark reports as favorite |
| **Dashboards** | • Pre-built dashboard | • Add/remove widgets | • Advanced dashboard customization |
| **Other Integrations** | | | |
| **Integrations** | • Pre-built integrations | • 5+ pre-built integrations | • Integration or app marketplace |
| **APIs** | • Read-only API | • Two-way API | • Multiple APIs |
| **Security, Customization & Configuration** | | | |
| **Security** | • Password complexity requirements<br>• Automatic logout after a period of inactivity<br>• Data encryption in transit | • Two-step login verification or two-factor authentication<br>• Data encrypted at rest | • Single Sign On |
| **Permissions** | • Limited number of pre-set role-based permission sets | • Customizable role-based permissions | • Granular role-based permissions |
| **Customization** | • Add a limited number of custom fields<br>• Customize dropdown menu lists<br>• Customize online form colors/header | • Add numerous custom fields<br>• Customize online (UI) form layouts | • Customize standard field names |

| | Standard | Enhanced | Advanced |
|---|---|---|---|
| Mobile Access | • System is responsively designed | • Vendor provides mobile app with limited functionality | • Vendor provides mobile app with robust functionality |
| **Training & Support** | | | |
| Training | • Initial training available during implementation<br>• Online training videos<br>• Occasional training webinars | • Role-specific training available<br>• Online multi-stage training program<br>• Regular training webinars | • Ongoing one-on-one training available |
| Support | • Email support<br>• In-system contextual help and tool tips<br>• Knowledge base | • Phone support | • Unlimited phone and email support at no extra cost<br>• Web chat support<br>• User community or forum |

# APPENDIX C: AUTHORS AND CONTRIBUTORS

## Authors

**Amadie Hart, Lead Researcher**
Amadie Hart is a contract writer and researcher for Tech Impact's Idealware and President of Hart Strategic Marketing LLC. She has a wide range of experience helping nonprofits assess their needs, select software to meet them, and engage audiences and constituents. She has extensively researched a wide range of topics for Idealware, from donor and grant management system to project management tools, and brings her experience and expertise with organizations of all sizes and missions to bear on our work.

**Chris Bernard, Managing Editor, Tech Impact**
Chris is a career writer and journalist with two decades of experience in newspapers, magazines, advertising, corporate and nonprofit marketing and communications, and freelance writing. He oversees Idealware's editorial and communications efforts, driving the creation and publication of more than a hundred articles, reports, and other resources and managing marketing and communications for Tech Impact.

## Contributors

Many thanks to those who provided comments on our criteria for review, and reviewed the final report:

- Erica Blake, Claire Billington, and Liora Lebowitz, Tech Impact
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- Tim Sarrantonio, Neon One
- Douglas Schoenberg and Jeff Vogel, SofterWare
- Dan Shenk-Evans, Build Consulting
- Maureen Wallbeoff, Meet Maureen
- Molly Walsh, Academy of American Poets
- Hunter Williams, Little Green Light
- Andy Wolber, WolberWorks

In addition, this report would not be possible without the voluntary participation of the vendors whose products we reviewed.

## About Our Sponsors

### DonorPerfect

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### Neon One

Neon One is a powerful technology ecosystem fueling mission-driven organizations to build capacity through software and services designed for social impact. We pioneer solutions for fundraising, community building, and program operations that power the future of philanthropy. Learn how Neon One energizes mission-driven organizations like yours to do more at neonone.com.

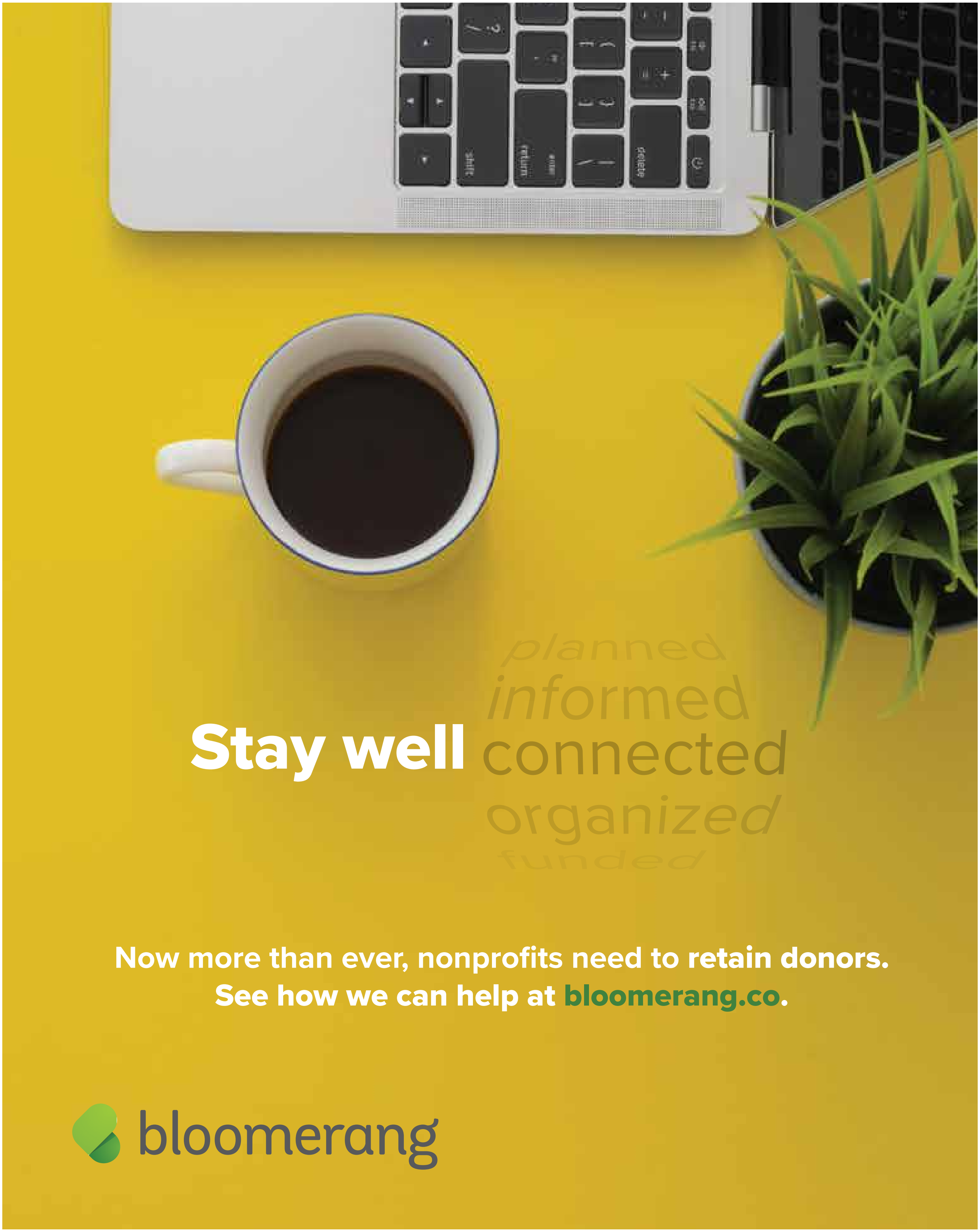
## About Tech Impact's Idealware

Tech Impact is a nonprofit on a mission to empower communities and nonprofits to use technology to better serve the world. The organization is a leading provider of technology education and solutions for nonprofits and operates award-winning IT and customer experience training programs designed to help young adults launch their careers. Tech Impact offers a comprehensive suite of technology services that includes managed IT support, data and strategy services, telecommunications, and cloud computing integration and support.

In 2018, it expanded its education and outreach capabilities by merging with Idealware, an authoritative source for independent, thoroughly researched technology resources for the social sector. Tech Impact's ITWorks and CXWorks training programs have graduated hundreds of young adults with the knowledge, skills and confidence they need to start their careers in the technology and customer experience industries. The organization also operates Punchcode, a coding bootcamp based in Las Vegas, NV. Learn more at www.techimpact.org.

## About the Technology Learning Center

Tech Impact's Technology Learning Center, or TLC, is an expansive collection of technology education materials—just like this workbook—created exclusively for nonprofits. It includes hundreds of free publications and downloads, a free organizational tech assessment, and the most comprehensive curriculum of webinars, courses, and on-demand learning about nonprofit technology currently available. The vast majority of resources are free, and the remainder are priced within reach of even the smallest nonprofits. Give your tech knowledge a little TLC at https://techimpact.org/technology-learning-center.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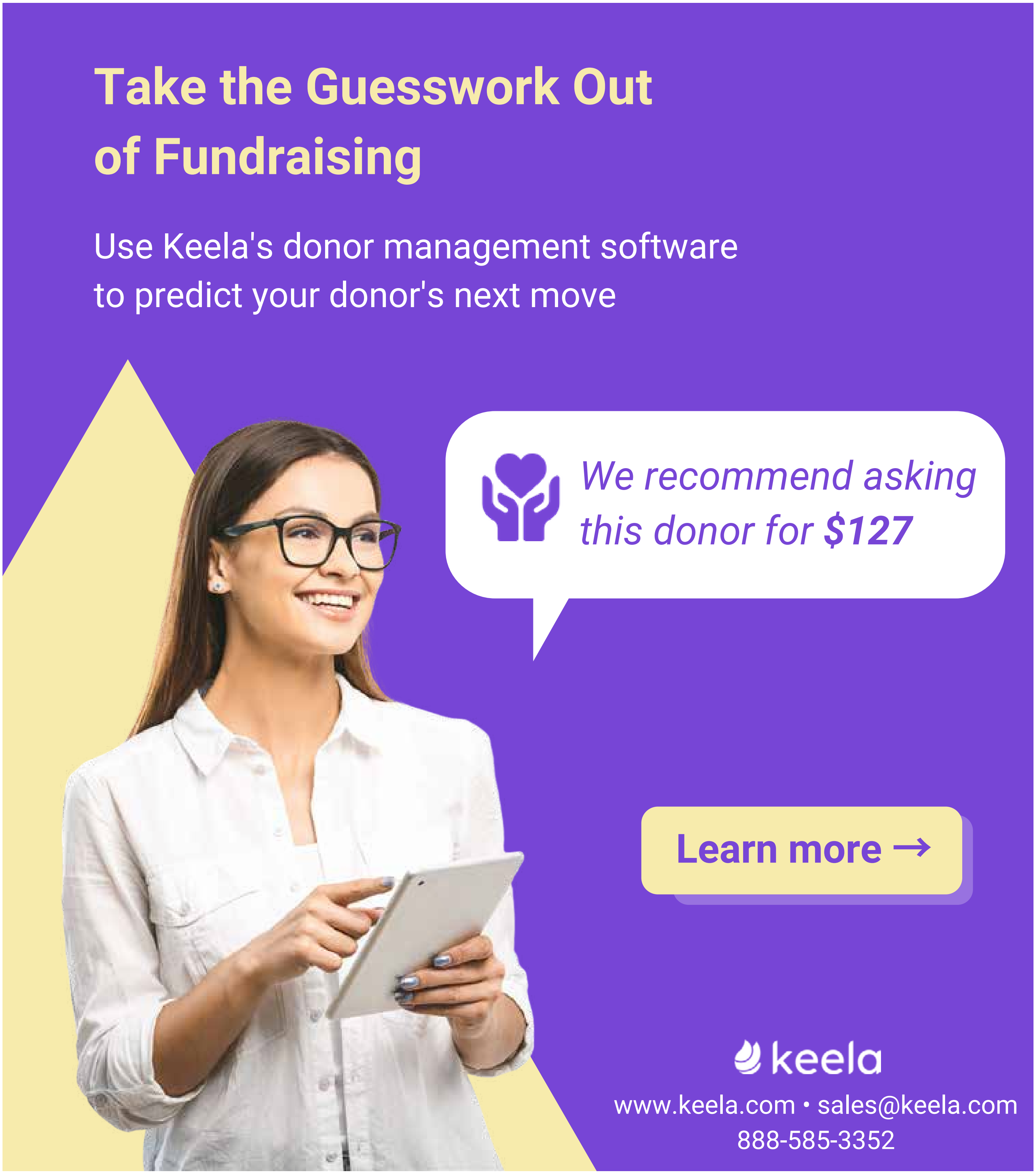


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