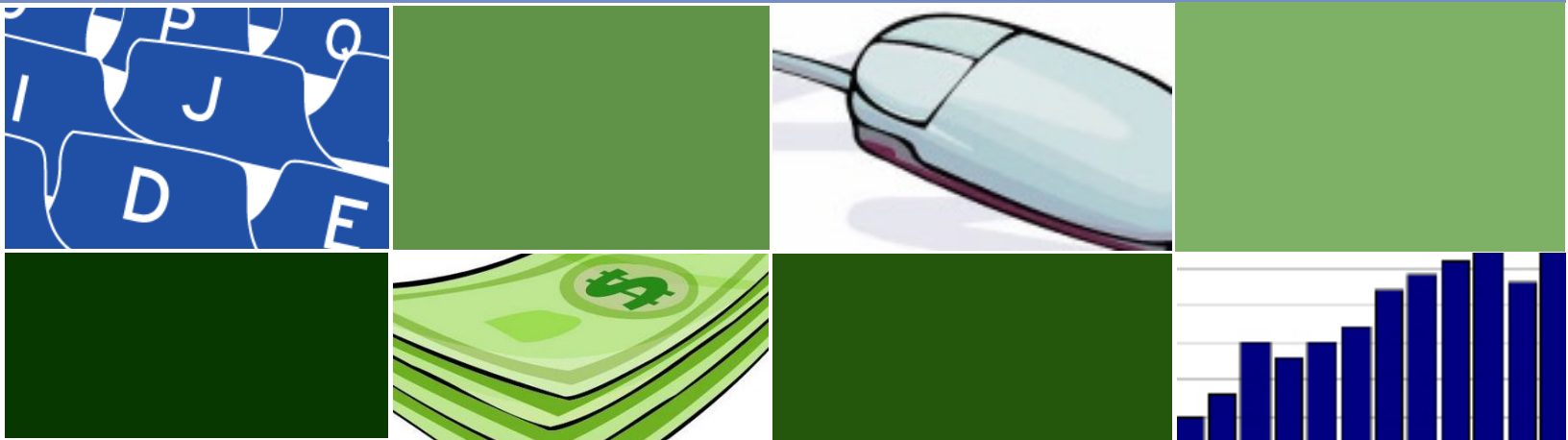




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A CONSUMERS GUIDE TO  
**LOW COST DONOR MANAGEMENT SYSTEMS**



April 2009



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## How Was This Report Funded?

Idealware was responsible for the research and editorial content of this report. NTEN was solely and entirely responsible for its funding, which came through two income streams.

First, NTEN solicited funding from the 33 vendors identified for inclusion in the report. All information about which vendors agreed to fund this report was kept from its authors. None of the authors knows what vendors were involved in funding, and neither NTEN nor funding vendors had any editorial input into reviews, summaries or the top 10 list. While some of these vendors may have received additional NTEN promotion in return for their funding (for instance, an ad in the NTEN eNews or at NTEN's Nonprofit Technology Conference), none received any consideration of any kind for this report.

Second, consultants and consulting firms who help nonprofits with donor management systems purchased the visible ads and directory listings in this report. All advertiser payments were made before the report was distributed for review. While one person from an advertising organization was interviewed for this report, and two of the advertisers participated in interviews, none of the advertisers had any editorial control over the text of this report.

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# INTRODUCTION

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Donors are the lifeblood of nonprofit organizations. You need them to survive. But how do you manage all the information about their giving along with all the personal details that are key to maintaining successful relationships, all for a price that won't break your bank? In this report, we look at a group of low cost donor management systems designed to do exactly that.

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

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

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There are a huge number of systems available, ranging from the basic to those that offer all sorts of additional features and functionality. Costs vary as well—you'll even find systems for very limited budgets. There are so many systems, in fact, that the challenge is not so much to find one that might work but to understand which one is likely to be the best fit. In this report, we take a look specifically at 33 lower cost systems—defined as under \$4,250 for the first year. This still encompasses a huge range of systems and prices; some

are only a few hundred dollars, while others cost as much as \$4,000 per year. Some are very full-featured, while others are very stripped down and simple.

So how do you choose? The first step, of course, is to understand your own needs. We provide a look at the types of systems available and what they typically do in order to help you get a sense of what to look for for your own organization. We then dive in for a closer look at some of the systems that we recommend out of the group.

Because nearly all of the systems we reviewed are useful in at least some situations, we defined a set of scenarios that cover a number of typical situations likely to apply to nonprofits and recommended the best systems, in our opinion, for each. You may find one or more scenarios that coincide with your organization's own. Once you've narrowed down the field that way, you can cross reference these recommendations against our Index of Low Cost Donor Management Systems.

Finally, we take a more detailed look at 12 of the systems that, to our minds, had the best combination of functionality, price and attractiveness in a number of situations. We do an apples-to-apples comparison of features to help you understand what might work for you and what makes each system stand apart from the others. This report includes a summary of those reviews, but for more details, check out the separate Detailed Reviews of Low Cost Donor Management Systems report.

There are a lot of good products in this market space, and there's a lot of information about them in this report. Keep your own needs and processes in mind as you read through it. By the time you've finished, you'll be armed with everything you need to know to start finding the right donor management system for your nonprofit organization.

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# WHAT TYPES OF SYSTEMS ARE AVAILABLE?

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As you start to consider your options, think through the high-level possibilities before delving into the detail of features.

## Do You Need a Donor Management System?

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

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

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A number of donor management systems cost just a few hundred of dollars or less, so you can likely find something within your reach. With all the information

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

## Tracking Donors vs. All Constituents

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

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

## Hosted vs. Installed Systems

A growing number of donor management systems are hosted entirely online, and accessible via a Web browser. In this model, sometimes called Software-As-a-Service (SaaS), you pay a software vendor to provide online access to the software. The software, and all

your data, is stored on the vendor's servers. You don't have to purchase any hardware, the vendor handles software updates and data backups, and your staff can access the system from anywhere there's an Internet connection.

This model is quite secure—many banks and hospitals with far greater security needs rely on similar models. Online systems also frequently have stronger support for other online processes, like emailing donors or integrating with your Web site. You typically pay a monthly or yearly “rent” for the system, which can range from a few hundred dollars per year on up.

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

Installed system vendors typically charge a “license” fee to buy the system, which is often based on the number of staff members you'll have using the system (also called “users” or “seats” or “licenses”). After you

pay the license fee, you typically are not committed to paying anything else, but most offer support and the ability to get updates to the system (such as new software releases with improved functionality) for a continuing annual fee. This annual fee, generally somewhere between 5 percent and 25 percent of the initial cost, is called a “maintenance fee” or “support and maintenance.”

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

## Custom-Built Systems

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

If you have needs or processes that are unique to your organization, you're probably better off starting with an existing system and customizing it, even extensively, if necessary. Existing systems will have basic functionality—like integrated mail-merging, emailing and standard reports—that would take you days or weeks to build yourself. Look for an extensively customizable system (there's a scenario specifically devoted to that in our Recommendations section) and start there. Or, consider that your processes are unnecessarily unique. You may be better off changing your processes to meet the standard best practices that existing systems are already designed to support.

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

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# WHAT DO THESE SYSTEMS DO?

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As you assess your own needs, it can be very helpful to understand the typical features and functions that are available, and how they compare from more basic to more advanced systems.

## Adding and Tracking Donations

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

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

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

The systems also vary in their support for types of gifts. Most support pledges, and let you log when donors promise gifts, but they don't all make it easy to create a pledge schedule, modify it to suit your needs,

or to then log gifts against those pledges when the gift is made. Does the system alert you to outstanding pledges, or do you need to track them down yourself?

Consider how the system deals with other gift types. Can you log gifts from a company as opposed to individuals, and separate them out in reporting? Does the system support tribute gifts, stock gifts or matching gifts? Most systems claim to support each of these things, but their actual functionality varies widely. Every organization's needs differ. Define what you really need to track for each of these gift types, and see what each system offers for your specific needs.

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

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All systems let you track things like the amount and date of a gift, but can you easily track the gift by a campaign, fund or source, or split the gift in order to associate each piece with different ones? Can you log a "soft credit" for gifts that someone else in the database—say, a board member—helped to bring in? Can you enter freeform notes to refer to later? Make sure the system lets you log and track the gift information that's important to you.

## Managing Donor Information

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

Can you store all the phone numbers and addresses you need, including seasonal addresses (so mailings follow them to summer or winter homes)? Can you clearly mark when someone should not be contacted at all?

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

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

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It can also be useful to track other relationships between different donors—for example, siblings or

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

When a donor calls, can you quickly see their involvement, their giving history, where you got their name, and your record of communicating with them? Is this information well-organized and easy to access, or do you need to look in 10 different places just to figure out whether you've talked to them before?

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

## Prospecting and Proposals

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

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

Some more advanced systems go a step further and let you set up complex prospect workflows that define

sequential stages and track your donors through them. These workflows can help organize the most appropriate solicitor action for different prospecting stages. Some systems offer sophisticated support for different stages out-of-the-box, while others let you flexibly set up your own workflows. Some let you track dollar amounts for ongoing solicitations and then see a fundraising pipeline forecast. It can also be handy to be able to schedule “ticklers,” or reminders, for yourself or others to do something or call someone on a certain date.

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

## Permissions

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

## Mail-Merging Letters

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

Some systems provide seamless letter creation and mail-merging with built in word processors. Others integrate with Microsoft Word to let you easily mail-merge into predefined Word templates. Some, though, require you to export data into Microsoft Excel and mail-merge from there. If you’re using a Mac, make sure the system supports it—some work fine with Macs in every way except mail-merging.

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

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

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

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

It’s also important to consider how the system logs the

letter into a donor's profile once it's been mailed. Is it logged automatically, or do you need to go through one or more extra steps to log it?

## Emailing

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

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

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Some of the more sophisticated systems provide useful broadcast email support, though surprisingly few of them offer functionality comparable to specialist tools like ConstantContact, VerticalResponse or Network for Good's EmailNow. Check to see if they support graphical emails or templates. Can you mail-merge donors' names into the emails? What about more complex data like gift strings (formulas that ask a donor to give, for instance, 25 percent more than their last gift)? Can you schedule an email to be sent in the future? Can you see reports of how many recipients opened or clicked through on your email? Will the software deal with unsubscribe requests or deactivate invalid email addresses?

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

In general, Idealware recommends sending broadcast emails through vendors' servers, which would mean choosing one of the few systems that allow that or opting for a third party broadcast email tool.

## Querying

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

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

As for the third, check to see if you can save queries, or if you can refine saved queries after you've generated a list—and how easy it is, or is not, to do so. With any tool, make sure you take a look at the querying functionality to judge how well it will meet your needs. Once you generate a list of donors, most systems will

let you export them into a file, or make updates across the whole group. Often, this is also where you start to generate mail-merged letters or emails. Some systems merge querying functionality with reporting and ask you to start your reporting process at the same time.

## Reporting

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

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

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

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You should also define what the word “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 dozens of reports that provide everything you need is better than one that provides hundreds of standard reports that you’ll never use.

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 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.

Look carefully at each system’s features to judge whether someone on your staff will be able to effectively create reports, and make sure you can save a report format once you’ve invested time in creating it.

## Payment and Web Site Integration

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

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

Some of the systems also support online payments. If so, what kinds of payment forms can you set up—just online donations, or recurring donations, event registrations, membership dues or item sales (which typically require online “shopping carts”)? A few

systems support distributed fundraising—also called team or peer-to-peer fundraising—with features that let supporters set up their own fundraising pages. Or can you set up a Web site sign-up form that doesn't require payment, like an eNewsletter subscription, for example?

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

Another thing to look into is the transaction fees you'll be required to pay for any credit card processing—you'll almost always have to pay something. Fees range from a minimum of about 2.5 percent all the way up to a whopping 7-8 percent.

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

## Tracking Events

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

For galas or dinners, you might also want to be able to link guests to paying attendees, or 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.

## Tracking Other Interactions

Donors are not your organization's only constituents—you may also have volunteers, members, program participants, event attendees or a wide variety of other people you work with. Chances are, you interact with many of these people in different ways. For example,

one person might not just be a donor, but also a volunteer and a mentor in your mentoring program. It's important to think through your approach to seeing a full picture of all your interactions with each person.

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

## Customization

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

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

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But few systems let you move, remove or change the names of the default fields that come with them, and they vary substantially in their ability to let you add new fields. Some permit very little in this area—either you can't add any new fields, or only a specific limited number. Others allow unlimited new fields, or even let

you customize further to support unique-to-your-organization constituent interactions. Check to see where your new fields will be displayed in the interface—often, they must go into a limited “custom field” area which can become disorganized and awkward if you add a number of fields.

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

## Integration

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

Whether your system is hosted (Software-As-a-Service) or installed, the donor data contained within it is yours. Being able to extract that data from the system is critical in order to back it up (an important process) or migrate it to a new system. Almost

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

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all of these systems allow you to freely export data, but it doesn’t hurt to be sure. Most also allow you to easily import, but check if there are additional costs to do so.

If you’re planning to frequently sync up the data between this system and another, manual imports and exports can become time-consuming and error-prone. Instead, you might want to hire a programmer to build an automated connection so data flows from one system to the next without manual intervention.

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

## Accounting Support

Because donor management systems track incoming money, it’s critical that they relate to your accounting system. When considering this, look for two different things—first, what controls and support are provided to make it easy to reconcile donations with your accounting system? Second, what kind of support does it offer for actually communicating with your accounting system?

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

But the systems vary in how they approach making changes to a payment after the batch it’s assigned to has been reconciled. Many systems offer no controls to prevent someone from changing a donation after the fact, which could throw your books out of whack.

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

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Others offer the opposite extreme—there's no way to make any change to a payment once it's been reconciled. The best approach may fall somewhere in-between—for instance, the ability to un-post and then re-post batches.

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

### Ease of Use

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

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

Systems should also effectively support power users—often, these users are development staff

who spend hours a day in the system. Being able to quickly add gifts, find information and run the right queries and reports can make a big difference in their efficiency.

### Support and Training

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

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

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

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Good documentation, either printed or online, is also critical. Ideally, information should be available when you need it within the system—for example, to let you see what clicking a button will do before you actually click it. But printed manuals are also useful. If you're going to widely roll out a system, can you tailor the documentation to your own processes?

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

### Installation and Maintenance

What must you do internally to support and maintain the system? Hosted systems are typically easier to

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

## Product Background

It takes considerable effort to choose a donor management software package and move your data into it. You don't want to be forced to repeat the process in a year because the vendor went out of business. There's no way to guarantee that a vendor won't go under or be bought by another firm, but it helps to look for red flags from the start.

When considering a system, consider the vendor, too. Ask some background questions—how long have they been in business? How many clients do they have, and how many staff members? Does the revenue earned

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

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from their system cover the personnel and operational expenses required to support it?

Most of the systems we include in this report have hundreds or thousands of clients. A vendor with a few hundred clients whose revenue covers expenses is likely to be as stable as any other company. Take your own preferences into account when thinking about company size. A small company might provide a more personal feel in their service, while a larger one might have more defined processes around conversions, training, upgrades and resolving support issues.

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# RECOMMENDATIONS

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Which of the 33 systems we reviewed are the best? That turns out to be a very complicated question. We expected to find a number of these systems to be noticeably sub-par, which would make it easier to narrow down our recommendations. But that wasn't the case—almost every system we looked at had its strengths, and we could think of a scenario for which almost every system would make sense. That's great news for organizations looking for a system that meets a specific set of needs, but it makes it very complicated to try to understand the market and sift through the options.

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

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

Note that all these scenarios assume that you need solid donor management functionality – for instance, you need to track pledges or advanced gift types, and easily generate printed thank you letters. And throughout the report, we're focusing on systems that cost less than \$4,250 in the first year. If your budget or needs differ—for example, if you're looking for a system that tightly integrates with your Web site, and you don't need any substantial fundraising functionality—you'll find many other systems that might meet your needs as well or better than those recommended here.

Once you're armed with a list of recommended systems that may best fit your needs, you can learn more about them in our Index of Systems, which is arranged in alphabetical order by system name. For cross-reference, there's a matrix of recommendations (along with some basic information about price and whether it's hosted or installed, and whether it will run on Macs) on page 21. You'll also find a more-detailed look at the 10 systems that, for us, offer the best combination of functionality, price and attractiveness in a variety of situations. We compare those systems on page 22.

Ready to dive in?

## You just need the basics

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

### Best Bets

**Giftworks**, by Mission Research

**BasicFunder Premier**, by Jellyware Corporation

**DONATION**, by Software4Nonprofits

### Also Consider

**Organizers Database (ODB)**, by the Organizers' Collaborative

**Exceed! Basic**, by Telosa Software

**Membership and Fundraising Suite**, by Linked Software

**LifeLine Nonprofit Management System**, by Straight Forward Software, Inc.

## You're a tiny but growing organization, and price is critical

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

### Best Bets

**Giftworks**, by Mission Research

**eTapestry**, by Blackbaud

**Donor Perfect Online**, by SofterWare Inc

### Also Consider

**Neon**, by Z2 Systems

**Exceed! Basic**, by Telosa Software

**Membership and Fundraising Suite**, by Linked Software

## You need something easy to set up and use

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

### Best Bets

**Donor Perfect Online**, by SofterWare Inc

**DonorPro**, by TowerCare Technologies

**Orange Leap MPX (hosted)**, by Orange Leap

### Also Consider

**Giftworks**, by Mission Research

**eTapestry**, by Blackbaud

**Sage Fundraising 50**, by Sage

**LifeLine Nonprofit Management System**, by Straight Forward Software, Inc.

## Fundraising events are a critical part of your process

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

### Best Bets

**Donor Perfect Installed**, by SofterWare Inc

**DonorPro**, by TowerCare Technologies

**Neon**, by Z2

**Mission Assist**, by Donor Strategies

**Sage Fundraising 50**, by Sage

### Also Consider

**Total Info**, by Easy-Ware

**Giftworks**, by Mission Research

**Orange Leap MPX**, by Orange Leap

**Exceed! Premier**, by Telosa Software

## You're pretty tech savvy, and you want a free system

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

### Best Bets

**Orange Leap MPX**, by Orange Leap

**Organizers Database (ODB)**, by the Organizers' Collaborative

### Also Consider

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

**CiviCRM**, by Social Source Foundation

**Metrix**, by Fund for the City of New York

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

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

### Best Bets

**Donor Perfect Installed/ Online**, by SofterWare Inc

**Neon**, by Z2 Systems

**Common Ground CRM**, by Convio

**Total Info**, by Easy-Ware

**Sage Fundraising 50**, by Sage

### Also Consider

**DonorPro**, by TowerCare Technologies

**Orange Leap MPX (installed)**, by Orange Leap

**Community Enterprise**, by CitySoft, Inc.

**CiviCRM**, by Social Source Foundation

**eTapestry**, by Blackbaud

**FundRaiser Select and Professional**, by FundRaiser Software

## You need to integrate the system tightly with email and your Web site

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

### Best Bets

**Neon**, by Z2 Systems

**DonorPro**, by TowerCare Technologies

**eTapestry**, by Blackbaud

### Also Consider

**Total Info**, by Easy-Ware

**Community Enterprise**, by CitySoft, Inc.

**CiviCRM**, by Social Source Foundation

**Donor Perfect Online/ Installed**, by SofterWare Inc

**Salsa**, by Democracy in Action

## You need something highly configurable

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

### Best Bets

**Common Ground CRM**, by Convio  
**Donor Perfect Online/ Installed**, by SofterWare Inc  
**eTapestry**, by Blackbaud  
**Orange Leap MPX (Installed)**, by Orange Leap

### Also Consider

**Salesforce.com Nonprofit Starter Pack**, by The Salesforce.com Foundation  
**CiviCRM**, by Social Source Foundation

## You want the best fundraising support \$4,000 will buy

You wish you could afford one of the fundraising systems used by the big organizations, but you really can't spend more than \$4,000 or so in the first year. The more support for strategic fundraising, the better—bring on the tools to track and analyze donor information, capture a number of different gift types and move people through prospecting stages.

### Best Bets

**Donor Perfect Online/ Installed**, by SofterWare Inc  
**Sage Fundraising 50**, by Sage  
**eTapestry**, by Blackbaud  
**Common Ground CRM**, by Convio

### Also Consider

**Total Info**, by Easy-Ware  
**Donor Pro**, by TowerCare Technologies  
**Orange Leap MPX**, by Orange Leap

## Other good values

Some of these systems aren't easily categorized by the scenarios above, but are still a good value for the money. Some of these just have a solid feature set for the price, while others are particularly suited for specific audiences.

**Donation Director**, by Cascade Data Solutions

**Mission Assist**, by Donor Strategies

**Fundraiser Select**, by FundRaiser Software

**MatchMaker FundRaising Software**, by Heritage Designs, LLC

**The Databank**, by thedatabank (particularly for advocacy groups)

**DenariOnline**, by Synergy Development Systems (particularly for missionary and child sponsorship programs)

**Organizers Database (ODB)**, by the Organizers' Collaborative (particularly for grassroots organizing groups)

# RECOMMENDATION MATRIX

To help you navigate your way through the full list of systems, we've compiled our recommendations into a chart and added some information about price and technical infrastructure. All prices are specifically for the first year.

	Price: 1 user, 900 donors	Price: Full features, 3 users, 5000 donors	Installed	Online Hosted	Complete Mac Support*	Just the Basics	Tiny but Growing	Easy to Set up & Use	Events are Critical	Free, for Techies	Track All Constituents	Online Integration	Highly Configurable	Best Fundraising	Also Good Values
BasicFunder Premier	\$	\$	●		●										
CiviCRM	-	-		●					●	●	●	●			
Common Ground	\$\$\$	\$\$\$\$		●						●		●	●		
Community Enterprise	\$	\$\$\$\$\$		●						●	●				
The Databank	\$\$\$	\$\$\$		●											●
DenariOnline	\$	\$\$		●	●										●
DONATION	\$	\$	●		●										
Donation Director	\$\$	\$\$	●												●
Donarius	\$	\$	●												
DonorPerfect Installed	\$\$\$	\$\$\$\$\$	●					●		●	●	●	●		
DonorPerfect Online	\$	\$\$\$\$\$		●		●	●			●	●	●	●		
DonorPro	\$\$\$\$	\$\$\$\$\$		●	●		●	●		●	●	●	●		
eTapestry	\$	\$\$\$\$\$		●	●	●	●			●	●	●	●		
Exceed! Basic	\$	\$	●	●	●	●	●								
Exceed! Premier	\$\$\$	\$\$\$\$\$	●	●	●			●							
FastFund Raising	\$	\$\$	●												
FUNDimensions	\$\$\$	\$\$\$\$\$	●		●										
FundRaiser Select	\$\$	\$\$\$\$\$	●							●					
GiftWorks	\$	\$\$\$\$	●		●	●	●	●							
Income Manager	\$\$	\$\$	●	●											
LifeLine Nonprofit Management	\$	\$	●		●		●								
MatchMaker FundRaising	\$\$	\$\$\$\$\$	●												●
Membership and Fundraising Suite	\$	\$	●		●	●									
Metrix	-	-	●						●						
MissionAssist	\$\$	\$\$\$	●					●							●
Neon	\$	\$\$\$\$		●		●		●		●	●				
Orange Leap MPX Installed	-	-	●					●	●	●		●	●		
Orange Leap MPX Hosted	\$\$	\$\$\$\$\$		●			●	●		●				●	
Organizers Database (ODB)	-	-	●		●				●						
ResultsPlus	\$\$	\$\$\$\$\$	●	●											
Sage Fundraising 50	\$\$\$\$	\$\$\$\$\$	●				●	●		●				●	
Salesforce.com	-	-		●					●			●			
Salsa	\$\$	\$\$\$\$\$		●							●				
Total Info	\$	\$\$\$	●		●			●		●	●			●	

\$: Under \$1000      \$\$\$\$: \$3000-\$3999  
 \$\$: \$1000-\$1999    \$\$\$\$\$: \$4000+  
 \$\$\$: \$2000-\$2999

\*Systems that support Mac integrated mail-merging. If you don't need integrated mail-merge, you can use any online hosted system from a Mac.

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# THE TOP 10

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

That doesn't mean these are necessarily the 10 best systems for you, as every organization's needs vary. But these 10 are strong in fundraising and likely to be the good solutions for a wide range of organizations.

We evaluated each of these systems based on a list of 127 criteria. The matrix on the next page summarizes our findings based on a rating scheme (the scheme itself is defined in Appendix B). There's also a matrix summarizing the pricing for each system on the page after that.

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**We evaluated 10 systems based on a list of 127 criteria. The matrix on the next page summarizes our findings.**

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And there's even more information! For detailed evaluations of all 10 of these systems, plus another bonus two, see our companion report, **Detailed Reviews of Low Cost Donor Management Systems.**

## Feature Comparison

We evaluated each of our top ten systems based on a list of 127 criteria, divided into 18 categories. This matrix summarizes our findings (the rating scheme itself is defined in Appendix B). See the next page for pricing information.

• None/ Not Applicable  
 Fair  
 Good  
 Excellent

	Common Ground	DonorPerfect Installed (Basic) *	DonorPerfect Installed (Full) *	DonorPerfect Online (Basic) *	DonorPerfect Online (Full) *	DonorPro	eTapestry (Basic)*	eTapestry (Full)*	Giftworks Standard (Basic)*	Giftworks Premium (Full)*	Neon	Orange Leap MPX Installed **	Sage Fundraising 50	Total Info
Adding and Tracking Donations	●	●	●	●	●	●	●	●	●	●	○	●	●	●
Managing Donor Information	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Prospecting and Proposals	●	●	●	●	●	●	●	●	○	○	○	●	●	●
Permissions	●	●	●	●	●	●	●	●	•	●	○	●	●	●
Mail-Merging Letters	●	●	●	●	●	●	○	○	●	●	○	●	●	●
Emailing	●	○	○	○	○	●	●	●	●	●	●	●	●	●
Querying	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Reporting	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Payments & Web Site Integration	•	•	●	•	●	●	○	●	•	●	●	○	●	○
Tracking Events	○	●	●	○	○	●	○	○	○	●	●	●	●	●
Tracking Other Built-In Interactions	○	●	●	●	●	●	○	○	○	●	●	●	●	●
Customization	●	●	●	●	●	●	●	●	○	●	●	●**	○	●
Integration	●	○	●	●	●	●	○	●	○	○	○	●	●	●
Accounting Support	●	●	●	●	●	●	○	○	●	●	○	●	●	●
Ease of Use	○	●	●	●	●	●	○	○	●	●	●	●	●	○
Extent of Support and Training	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Ease of Installation & Maintenance	●	●	●	●	●	●	●	●	●	●	●	○**	○	○
Product Background	○	●	●	●	●	●	●	●	●	●	●	●	●	●

\* **Basic** refers to the cheapest version of the system you can buy; **Full** to the version with all relevant modules and upgrades.

\*\* Orange Leap MPX also offers a hosted version. The ratings for it are identical except it received a Fair in Customization and an Excellent in Ease of Installation and Maintenance.

## Pricing Comparison

This matrix summarizes the list cost for each of our top 10 systems. Note that some vendors routinely discount from the list cost, particularly if you're buying a lot of extra modules or consulting services. It's always worth getting an estimate directly from the vendor.

	One User, 900 Donors		Three Users, 20,000 Donors	
	First Year	Yearly Ongoing + Email Support	First Year	Yearly Ongoing + Email Support
<b>Common Ground</b>	\$2400	\$2400	\$3600	\$3600
<b>DonorPerfect Installed (Basic) *</b>	\$2995	\$725	\$5540	\$825
<b>DonorPerfect Installed (Full) *</b>	\$5000 - \$6000	\$1205	\$7900+	\$1305
<b>DonorPerfect Online (Basic) *</b>	\$720	\$1200	\$4008	\$4704
<b>DonorPerfect Online (Full) *</b>	\$2000 - \$3000	\$2400 - \$3600	\$5000 - \$6000	\$6000 - \$7000
<b>DonorPro</b>	\$3480	\$1980	\$4620	\$3120
<b>eTapestry (Basic)*</b>	\$444	\$774	\$4032	\$4866
<b>eTapestry (Full)*</b>	~\$3000	~\$3000	~\$7250	~\$7250
<b>Giftworks Standard (Basic)*</b>	\$399	\$0	\$1197	\$0
<b>Giftworks Premiumm (Full)*</b>	\$1346	\$0	\$4038	\$0
<b>Neon</b>	\$859	\$540	\$3939	\$2820
<b>Orange Leap MPX Installed</b>	\$0	\$1188	\$0	\$3564
<b>Orange Leap MPX Hosted</b>	\$1668	\$1668	\$5064	\$5064
<b>Sage Fundraising 50</b>	\$3400	\$850	\$5900	\$1475
<b>Total Info</b>	\$695	\$240	\$2095	\$240

\* **Basic** refers to the cheapest version of the system you can buy; **Full** to the version with all relevant modules and upgrades.

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# HOW TO CHOOSE

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

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

## **Don't over-prioritize price.**

First off, don't let minor differences in price be a big factor in your decision-making. Saving money is important to every nonprofit, but a few hundred dollars shouldn't dictate your fundraising future. Instead, factor in the time you'll save by using a more efficient system—for instance, simply being able to more easily print customized letters and send emails can save a lot of time. And better communications, more information about your donors and campaigns, and more support for effective prospecting—paired, of course, with an effective fundraising strategy—can help bring in thousands of dollars more a year even for small organizations. Which means the system pays for itself over time.

## **Make a plan for all your constituents and interactions.**

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

## **Understand your own donor processes.**

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

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

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## **Identify your communication priorities.**

The systems vary considerably in their support for creating mail-merged letters and sending email. Some are only really good at one of these. Others fare poorly at both. Think through your needs in this area and determine what's important to you. (Keep in mind, though, that very few of these systems support broadcast emailing as robustly as even inexpensive specialist systems in these areas like VerticalResponse or ConstantContact. It may be more cost-effective and efficient to use such an external program in tandem with your system.)

## **Estimate your numbers now—and in the future.**

How many donors do you plan to store in the system? How many staff members will be using it, now and three years from now? The cost structures

vary a lot between different systems, so one that is cheap now might not be if you double your number of donors. One that's a bit of stretch now could turn into a wise investment if it easily scales to support many more donors and users with little extra cost.

### **Weigh flexibility vs. complexity.**

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

### **Consider the priority of accounting control.**

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

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

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

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

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

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

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# INDEX OF LOW COST DONOR MANAGEMENT SYSTEMS

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Now that you've read through our thoughts and system recommendations, it's time to dive down into more detail. This section provides short Idealware reviews of each system included in this report. They're arranged in alphabetical order by system name. (Don't forget that we reviewed 12 of these systems in even more detail—you can find them in our **Detailed Reviews of Low Cost Donor Management Systems**, the companion report to this one).

## BasicFunder Premier

by Jellyware Corporation, [www.jellyware.net](http://www.jellyware.net)

### Installed on PC desktops

At \$249 for as many users as you like, with support included, BasicFunder Premier offers a nice set of basic features. It tracks pledges and volunteer hours as well as simple donations, and will automatically log (although not charge) recurring donations. It provides a simple but useful internal word processor for creating mail-merged letters, and will allow you to send simple text emails that include mail-merged fields. Reporting features are solid, with a number of canned reports with simple date range options, an ad-hoc pivot-type-table report builder (although it won't let you include custom fields), and a list-builder to create queries and define what fields you want to see for them. It's weak in address-handling and relationships, however—you can store only a single address unless you use custom fields, and there's no support for relationship tracking (for example, "John works with Jill," or "knows Barbara on the board") other than through notes. Householding must be done manually, either by tracking a spouse only in a notes field, for instance, or otherwise marking one of the spouses as "do not mail." All in all, it provides a limited but useful set of features at a very reasonable price.

## CiviCRM

by Social Source Foundation, [www.civicrm.org](http://www.civicrm.org)

### Installed on your own Web server

This free and open source online system offers basic functionality for donations, as well as a number of other constituent interactions, but very little in the way of reporting. It's straightforward to add a donation, and to receipt it via email, but you'll need to know if a donation corresponds to a pledge prior to entering it, and you need to export the data in order to mail-merge a thank you or other letter. The system has support for a number of different interactions, including a strong event module, and you can see a useful summary of each constituent's relationships and activities. However, there are no reports at all, just queries that can be exported to Excel—though the system ships with some prepackaged queries to support common lists, like lapsed donors. The system integrates tightly with common Web site content management systems with online payment and form-building functionality, like Drupal and Joomla. You'll need someone familiar with installing and configuring open source systems on a Web server in order to get you up and running. If you're looking for tight donor and constituent integration with a Web site, this may be a good option, but otherwise you may find the reporting and analysis layer lacking.

## Common Ground CRM

by Convio, [www.convio.com/crm](http://www.convio.com/crm)

### Online hosted system

Convio, a large vendor with a lot of nonprofit experience, recently launched Common Ground as a hosted donor management product built on top of the Force.com platform (as in Salesforce.com). This option will interest many nonprofits. Convio added substantial donor-specific functionality without changing Salesforce's extremely flexible nature. The resulting product has strong support for gift entry and tracking, integrated receipting, mail-merging, emailing, householding and a substantial number of useful standard reports. It has no built-in support for payment processing (online or offline), or for events or volunteer tracking—although the vendor reports that both of the latter are coming in June 2009. However, it's very customizable, and as you can also take advantage of the many add-ons built for Salesforce.com via the AppExchange (most at additional cost), there are many opportunities for your technical staff or a consultant to extend the system. The interface is reasonably laid-out, but complex, and most users will require training. Pricing is based solely on the number of people using the system, starting at \$2,400 per year for two users, including support. Additional users are \$1,200 per year each. [See our detailed review in our separate Detailed Reviews of Low Cost Donor Management Systems report.](#)

## Community Enterprise

by CitySoft, Inc., [www.citysoft.com](http://www.citysoft.com)

### Online hosted system, or Installed on your own Web server

Community Enterprise is a highly integrated package with support for a number of different areas, including managing donors, events, membership and Web site content management. The donor management component is fairly basic—the process to enter a gift is straightforward, but there's not much support for alerting users to a pledge, and you'll need to manually mark that you've sent printed thank you letters. There are no predefined donor reports—but a fairly advanced query tool allows you to find a list of donors, email them, mail-merge letters or export data to Excel. Community Enterprise has strong event- and member-management functionality, and could be a good fit for those with lighter donations needs looking to support online communities, track membership data and manage events. Nonprofits with annual budgets of \$500,000 or less can receive a free version of the Community Enterprise code through TechSoup, and host it with CitySoft for \$75 a month. For larger nonprofits, the hosted version of the software is \$250 to \$500 a month. You can also purchase the system one time and host it yourself, but the price is well beyond the threshold for this report, at \$15,000.

## The Databank

by thedatabank, [www.thedatabank.com](http://www.thedatabank.com)

### Online hosted system

The Databank provides a standard feature-set with modules to manage donations, volunteers, advocacy, voters and more—which they then customize with the appropriate fields and reports to meet each client's needs. The user interface is clunky at times—for instance, everything is displayed as text with links rather than using buttons for actions, and you need to navigate through a number of complex screens and options to create a query. There's a great centralized history of each constituent's history with the organization, and a useful quick search on every page. An advanced querying tool allows you to generate a list of people to contact, and then email them or create a mail-merged letter. It offers both prepackaged reports and customizable "roster" reports—all reports are displayed in a matrix format, so they have a basic look but good information. Despite the shortcomings, the strong advocacy- and event-management features make this a nice option for domestic advocacy groups with integrated donor management needs. The system, with the Fundraising module included, is just under \$200 per month, which equates to \$2,400 per year. A \$550 initial setup fee includes customization of fields; custom reports are extra. Support and training are included.

## DenariOnline

by Synergy Development Systems, Inc., [www.denarisoft.com](http://www.denarisoft.com)

### Online hosted system

This is a strong system that will be of particular interest to Christian ministries and organizations, but it's hampered by some usability issues. It's fully featured around gift entry, with the ability to easily apply gifts to pledges and to split gifts across multiple designations. The workflow is geared to those who want tight accounting controls; all gifts must be entered into a batch, and thank you letters cannot be created until the batch is posted. Donor information is spread out across a number of tabs with an unusual navigation system, which makes it a bit difficult to get a full view of all activities. There's a fully built-in email and text editor, with templates and mail-merging. The querying tool is powerful, but not trivial to use—it can be difficult to find the right system fields, and to arrange them into the query you want. Standard reports are strong once you get the query right, with a number of both summary reports and more detailed views. There's no ability to create ad-hoc custom reports, however, other than by exporting data out of the system. Beyond just donor management, the system offers unusual modules to support ministries, such as features to support missionary work, child sponsorship and radio “-a-thon” events. The price varies both by number of system users and by number of records—for instance, it would cost \$840 annually for one user and 1,000 donors, or \$1,860 for three users and 5,000 donors. Phone support is included.

## Donarius

by Nuverb Systems Inc, [www.nuverb.com](http://www.nuverb.com)

### Installed on PC desktops

After seeing our review, the vendor requested that it not be published.

## DONATION

by Software4Nonprofits, [www.software4nonprofits.com](http://www.software4nonprofits.com)

### Installed on PC desktops

This exceedingly simple installed system is an interesting option for those with very straightforward needs. It tracks only basic contact info, donor category, and donation amounts and categories—it's focused on tracking gifts rather than managing a fundraising process. It supplements this tracking function with some basic mail-merge and reporting functionality, including support for more complicated Canadian receipts out of the box. There's no support for any other kinds of interactions, including email or online payments, and there's no ability to track relationships, donor activities or your contact history, other than through freeform notes. The system is targeted at small organizations, and nonprofits with more than a few thousand donors will quickly outgrow it. The system is \$60 to \$110 per user license (depending on the size of the organization), including support and upgrades for the first year.

## Donation Director

by Cascade Data Solutions, [www.donationdirector.com](http://www.donationdirector.com)

### Installed on PC desktops

Donation Director provides useful and affordable support for donor management needs. Features to track gifts and donor information, mail merge, email, query, integrate with other systems and create reports (including ad-hoc reports) are all reasonably strong, although not the strongest among the systems reviewed in any of these areas. The interface is not highly polished, but it's reasonably usable, and it makes it easy to get either a brief look at or detailed information for a donor. It provides functionality to process credit cards in the system, but no support for Web site integration or online payments, and little support for other constituent interactions like events, volunteering or membership. Strong accounting controls provides a level of rigor that some organizations will welcome, but may be more than what others want. The system is affordably priced for what it offers, at \$1,599 for a single user or a flat \$1,999 fee

for up to five user accounts. The purchase cost includes not only support but unlimited training for the first year, an unusual perk; after that, support and maintenance is \$299 per year for a single user or \$499 for up to five users. [See our detailed review in our separate Detailed Reviews of Low Cost Donor Management Systems report.](#)

## DonorPerfect Online and Installed

by SofterWare Inc, [www.donorperfect.com](http://www.donorperfect.com)

**DonorPerfect Installed is installed onto PC desktops. Donor Perfect Online is an online hosted system.**

SofterWare offers two similar but distinct systems: DonorPerfect Installed (DPI), and DonorPerfect Online (DPO). There are small functional differences between them, but for the most part they're very similar. They're both very interesting systems, with as strong functionality as any system we reviewed in gift and donor tracking, prospecting and support for accounting needs, and they are laid out to be among the easiest of the systems to use. The systems are very configurable to meet specific processes, including custom fields, custom interactions and the ability to delete or rename fields that aren't helpful to you. They provide useful mail merge functionality, querying and reporting, but the email functionality is not very strong—you can't for instance, mail merge fields into emails. An optional module also adds strong online payment functionality. Both support volunteers and members; the Installed package also has some events functionality. The Installed version is \$2,995 for a single user, \$4,895 for two users and \$645 for each additional user. Yearly maintenance starts at \$495 per year. Support costs extra, but the vendor will work with you for free to customize the system to your needs. You'll need to pay extra to import data. The Online version starts at \$360 per year for one user account and up to 500 donors. It quickly increases in price from there—for instance, 25,000 donors and three user accounts would cost about \$4,000 per year. Support is extra, starting at 18 percent of the yearly fees. [See our detailed review in our separate Detailed Reviews of Low Cost Donor Management Systems report.](#)

## DonorPro

by TowerCare Technologies, [www.towercare.com](http://www.towercare.com)

**Online hosted system, or installed on your own webserver**

DonorPro has solid functionality in every category we reviewed. It's particularly strong in support for pledges, accounting controls, mail-merging and reporting (it includes a very nice ad-hoc report writer as well as standard reports). The visual design is not beautiful, but it's quite usable, with a particularly friendly tool for generating queries and a number of functionalities that speed up repetitive tasks like data entry. The system provides useful support for emailing, Web integration and volunteer tracking. An optional module provides support for events. In addition, the system provides functionality for human resources functions, inventory management and patient services, which will be of particular interest to those in the health and human services sector. They charge a \$1,500 setup fee (plus \$500 for the optional events module) up front, and then a yearly fee of \$1,920 plus \$0.06 per constituent, for an unlimited number of staff users. Support is included. [See our detailed review in our separate Detailed Reviews of Low Cost Donor Management Systems report.](#)

## eTapestry

by Blackbaud, [www.etapestry.com](http://www.etapestry.com)

**Online hosted system**

eTapestry provides useful and affordable functionality for small organizations who aren't yet tracking a lot of donors, with a growth path to a more feature-rich system (although at considerable additional cost). The base product provides strong gift- and donor-tracking functionality, and querying, as well as reasonable email, mail-merged letter and reporting functionality. The system is very configurable—in addition to adding custom fields or deleting existing fields, you can add configurable "Journal" entries which allow you to track multiple linked fields (for instance, a date, a category and a rating for the same interaction). Many system functionalities require an additional charge, however—for

instance, importing data, advance emailing, online payments and Web integration all require additional fees. There are a lot of features and options in the system, and some terminology may not be intuitive to all users, making it more complex to use than many we reviewed. The price varies greatly depending on the number of people using the system, the features you add, and the number of donors you store. The base system is free for a single user and up to 500 users, or \$444 per year for one user and up to 1,000 donors. It quickly increases in price from there. For instance, 25,000 donors and three users who could use the system at the same time would cost about \$4,000 per year. Support is extra, starting at \$330 per year. **See our detailed review in our separate Detailed Reviews of Low Cost Donor Management Systems report.**

## Exceed! Basic

by Telosa Software, [www.telosa.com](http://www.telosa.com)

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

This is an inexpensive but limited system with reasonable support for donations, receipting and reporting. A record covers an entire household, which is an interesting approach—you can store two people in that household, but you can't track affiliations or gifts for each individual, only for the household as a whole. The view of actions is reasonably centralized, but gifts are separate from other actions, and actions only appear in a list as five-digit codes. Receipt-generation is strong—for instance, you can choose to print a receipt immediately, or choose a letter template and easily do a batch run of everything (regardless of which template) later. The query engine uses a “wizard” process with a fair amount of steps that might be friendly to more novice users. Some screens are crowded and busy, but the general layout makes sense. There's a nice upgrade potential to Exceed Premier, with free data conversion, but the price point limitations are visible—for example, you can store only one relationship to people outside a household, and there's no automatic logging of emails or letters into their action tab. It's \$499 for the first license and \$100 for each additional user, with a number of support packages starting at \$200 (or keep an eye out for discount offers from TechSoup).

## Exceed! Premier

by Telosa Software, [www.telosa.com](http://www.telosa.com)

### Installed on PC desktops or Online hosted service (via Citrix)

This is an interesting system that considers each record an entire household or organization—you can store as many people as you want in that household or organization, and track affiliations and gifts for them separately. The view of each donor's activities is reasonably centralized, but actions only appear in a list as five-letter codes—which could lead to difficulties keeping track of them all as the list grows. Receipt-generation is strong—for instance, you can choose to print a receipt immediately, or choose a letter template and easily do a batch run of everything (regardless of which template) later. The query engine uses a “wizard” process with a fair amount of steps that makes querying easier for less savvy users (or you can just write them in SQL, if you prefer). You can then use those queries to send emails (with merged salutations) or create mail-merged letters. Some screens are crowded and busy, but the general layout makes sense. The events module tracks RSVP status, table assignments and name tags, and is included in the core price. The system is \$3,095 for a single user (or \$2,095 if you only need to track up to 2,500 records), and \$500 for each additional user, with an annual support cost of 20 percent of the license cost. A number of fairly deep add-on modules (including Grants, Volunteers and Wealth Screening) improve the system's overall capabilities for about \$800 each.

## FastFund Raising

by Araize, [www.araize.com](http://www.araize.com)

### Installed on PC desktops

Araize offers nice, affordable features for tracking gifts, issuing thank you letters and storing general information about donors, but is weak in emailing and mail-merging letters. The gift entry and thank you letter process is friendly to those

entering either a single gift or a number of them in one sitting, and the system provides a nice donation history and summary of each donor. However, to create printed letters other than thank you letters or emails, you need to create a query using a very complicated query engine (which can then be saved), and dump the data into a .CSV file in order to merge it. There are a number of canned reports that can be customized with simple parameters like a date range, or there's also a third party report builder that ties into the system. The system is \$299 for a single user and up to 1,000 donors, \$595 for a single user with unlimited donors, or \$1,090 for up to five users. Araize also offers a fund accounting solution that fully integrates with FastFund Raising. They provide three months of free support and ongoing support at additional cost after that.

## FUNDimensions Fundraising Software

by FUNDimensions, [www.fundimensions.com](http://www.fundimensions.com)

### Installed on Mac or PC desktops

FUNDimensions offers a nice set of basic features, and is one of the only systems covered with support for both Macs and PCs. The interface is unusual, and relies on a number of windows open on your computer at once. For instance, when looking at a particular donor, one window displays a list of donors, another displays donor details, while a smaller window displays statistics on donations, pledges and memberships. It can be easy to lose sight of some of these windows, but once you get used to them, they (along with other system features, like a number of graphical charts) provide useful quick overview information. The system offers strong relationship management and sophisticated support for events. Querying is powerful but complicated, and both Mac- and PC-users can mail-merge letters. There are many available canned reports, most in a simple table format, as well as the ability to create custom reports. The system supports groups using a mixture of Macs and PCs, an infrastructure for which it's otherwise difficult to find solutions. However, only the single user version fits into the price point for this report, at \$2,500 (including email support). It jumps to \$4,550 for two simultaneous users.

## FundRaiser Select and Professional

by FundRaiser Software, [www.fundraisersoftware.com](http://www.fundraisersoftware.com)

### Installed on PC desktops

FundRaiser Select has solid donation management features, but an over-reliance on codes make it sometimes difficult to use. There's straightforward support for entering donations, and additional modules (at \$300 each, with Select) offer more robust support for pledges, memberships, premiums, tributes, product sales, volunteer tracking and more. Address functionality is strong; every address can be tied to a season, and there's support for international formats. A useful querying tool allows you to find a group, email everyone in it, or print mail-merged letters using a built in word processor. However, throughout the system, interactions are displayed primarily through short codes or acronyms rather than more descriptive names, which could lead to difficulties keeping track of them all as the list grows. The Select version of the system is \$1,200 to license for a single user, or \$1,700 for a multi-user version. The Professional version provides you with all the additional modules plus additional support for unlimited custom fields, split gifts, soft credits, campaign management and more for \$3,500 for a single user, or \$4,500 for the multi-user version. Support is extra.

## Giftworks

by Mission Research, [www.missionresearch.com](http://www.missionresearch.com)

### Installed on PC desktops

Giftworks is a very friendly, polished system that offers impressive functionality for its low price. It provides useful gift tracking and donor management functionality, with a nice "dashboard" of all your interactions with a donor. Emailing, mail-merging, querying, reporting and accounting controls are also solid. While the base product is limited in its support for interactions beyond off-line donations, add-on modules provide functionality for events, volunteer

tracking and online donations. The Premium version adds support for seasonal addresses, different user roles and additional custom fields. The system is full of wizards and features to make it easy for you to find what you need, but it doesn't support the advanced user as much as some other systems with, for instance, an interface to support bulk gift entry, or advanced ad-hoc reporting tools. Giftworks Standard is \$399 per license; the Premium edition is \$699 per license. Additional Volunteer, Events and Online Donation modules are from \$149 to \$299 each per license (there's an additional monthly fee for the Online Donations module). Email support is free, but phone support costs \$399 per year for your whole organization. **See our detailed review in our separate Detailed Reviews of Low Cost Donor Management Systems report.**

## Income Manager

by Income Manager Inc., [www.incomemanager.net](http://www.incomemanager.net)

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

True to its name, Income Manager provides support for a number of different kinds of income, including donations, events and items, as well as reasonably deep support for volunteer management. There's a strong and useful setup for campaign tracking that summarizes the amount raised, number of people, number of gifts and more for each campaign code, and lets you track costs against it. It also lets you query and assign everyone in that query to a new campaign code—essentially, to track the success of one segment of the database against another. The features to create queries, emails and letters are not very easy to use, however. You need to open a separate (included) application to create receipts and thank you letters. For other letters, you need to export data out of the system (for instance, to Excel) in order to merge it with a word processor like Word. Emailing requires you to create and save your query, write and save your email text, and then open yet another (included) application to actually email. Querying itself requires substantial knowledge of how databases work. There are a number of prepackaged reports, or you can connect to the Access database underlying the application and build your own reports. The language is Canadian English throughout—you track “cheque” numbers, for example, and there's a field for “advantage amount,” which is a Canadian tax term. The system is \$1,595 for as many users and donors as desired. Support is an additional \$575 per year, and a recommended two days of training is \$1,400. They also offer a hosted version (provided via Citrix) at \$75 per month.

## LifeLine Nonprofit Management System

by Straight Forward Software, Inc., [www.straightforwardsoftwareinc.com](http://www.straightforwardsoftwareinc.com)

### Installed on PC desktops

This is a friendly system for smaller organizations. It generally works just as you'd expect it to, although it's more traditional-looking than polished. The gift entry process is very straightforward, with easy receipt-generating functionality. To support householding, each record covers two people, which might be convenient or awkward depending on your process. Each household record shows a nice summary of gifts, volunteer hours and membership information, with a contact log. However, there's no integrated email, and you'll need to export data out of the system to mail merge any letter other than a receipt or a label. The system is \$595 for a single user, or \$845 for unlimited users, which both include unlimited phone support.

## MatchMaker FundRaising Software, Standard and Enterprise Edition

by Heritage Designs, LLC, [www.matchmakerfrs.com](http://www.matchmakerfrs.com)

### Installed on PC desktops

The company is run by former nonprofit development staff, and that experience shows in the application. Screens are clean and uncluttered, and it's easy to do things like manage multiple addresses, view donor pledges before entering gifts, and enter multiple gift amounts or recurring gifts. There's no automatic payment processing for donations or events, but the system handles receipting well. The Enterprise Edition adds features like split gifts and strong functionality around automated email blasts. Some users may struggle with a few interface issues, like required fields

not marked as such and some non-intuitive technical terms, but generally this system is fairly understandable for the average user. It also supports lots of useful reports, and is laid out nicely with lots of query options—overall, a robust system. It also has strong, automated ties to QuickBooks. The Standard Edition is \$1,990 for a single user, \$2,795 for two users or \$4,245 for unlimited users, while the Enterprise Edition is \$2,790 for a single user, \$3,795 for two users or \$5,495 for multiple users. Support is extra, at \$700 per year for a single user and up.

## Membership and Fundraising Suite

by [Linked Software, www.linkedsoftware.com](http://www.linkedsoftware.com)

### Installed on PC desktops

This is an interesting and affordable system for those who want a strong tie between their donor management, membership management and accounting systems. There is strong support for batch entry of gifts, pledges and tracking of not only donations but also event payments and membership fees against funds. However, the workflow is not optimized for organizations who don't plan to enter many gifts in one sitting—for instance, to enter a single gift, you need to first create the donor (if new), then enter the gift into an existing batch with fund and revenue code, then create a thank you letter as a report. The system provides a straightforward querying tool and a useful report generator, and supports both mail-merged letters and emails. The system provides a large number of donor information fields out of the box, and the ability to track unlimited numbers of categories, but no additional custom fields. The system is \$299 for the first license, and then \$59 for each additional user.

## Metrix

by [Fund for the City of New York, metrix.fcny.org](http://metrix.fcny.org)

### Installed on PC desktops

A free, open source installed system with a Microsoft Access interface and SQL Server back-end, Metrix is flexible and reasonably powerful, but includes few donor-centric features out of the box. The system is based around a central constituent record, with a configurable “interactions portal.” Some basic interactions—such as ones to support program attendance, events, pledges, payments, communications (mailings, email blasts, phone calls) and membership—are included with the base product, but many organizations will want to spend time (or money to hire a consultant) to configure the system further to better support more robust functionality. Letters are produced by exporting and mail-merging in a different system; there is no integrated communications. The overall interface is well laid-out, but a complex array of fields makes it a bit difficult to learn. It's strong in querying and generating exports to Excel, but there aren't any standard reports, so getting information out requires mastery of the query tool or the creation of custom reports using the native Access reporting tool. There's community support for the basic product, or The Fund for the City of New York offers a setup and support package.

## Mission Assist

by [Donor Strategies, www.donorstrategies.com](http://www.donorstrategies.com)

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

Mission Assist has integrated, useful support not just for adding gifts and tracking donor information, but also for events, volunteers, membership and online payment functionality. You can also send emails through the system, including merging some basic fields. However, it doesn't support any custom fields or custom interactions, and you'll need to export data out of the system and merge it by hand to create mail-merged letters other than thank you letters. The layout is crowded at times, and some screens are not optimally laid-out. The system is \$1,495 for a single user, or \$2,495 for unlimited users. Web site integration and online payments costs an additional \$600 per year. Support is extra, at \$250 for a single user or \$500 for unlimited users. [See our detailed review in our separate Detailed Reviews of Low Cost Donor Management Systems report.](#)

## Neon

by Z2 Systems, [www.z2systems.com](http://www.z2systems.com)

### Online hosted system

Neon is a strong, integrated online system with reasonable support for donor management. It has limited support for pledges, soft credits and batches for accounting purposes, and you cannot import gift data, but it does support matching gifts and gifts from organizations, and has reasonable relationship and household tracking. The support for mail-merged letters is useful, and it's the strongest system we reviewed for emailing, Web integration and online payment processing, reporting, querying and the ability to customize. It supports a wide variety of constituent interactions—it not only has events, volunteers and membership functionality, but also full online-store functionality, including inventory tracking. The price varies depending on the number of donors you store. For instance, it's \$360 per year for up to 1,000 donors, \$1,800 per year for up to 10,000 donors, and \$3,588 per year for up to 50,000 donors. Support is extra: email support costs \$180 per year. [See our detailed review in our separate Detailed Reviews of Low Cost Donor Management Systems report.](#)

## Orange Leap MPX

by Orange Leap, [www.orangeleap.com](http://www.orangeleap.com)

### Available on PC desktops via terminal services, either installed on your own infrastructure or hosted by Orange Leap.

Formerly known as MPower, the open source Orange Leap provides useful functionality for tracking gifts and donor information, email and custom fields, with strong support for mail-merging letters and accounting controls. Querying and reporting are also particular strengths. The system doesn't support any online payments out-of-the-box, but an API would allow a programmer to integrate this or other functionalities. It's a powerful system that is more complex than most we reviewed, but it does a reasonably good job of arranging fields and screens in intuitive ways. And if you use the installed version, access to the source code allows any qualified programmer to make modifications. The vendor provides a version that both is installed on your local server and made available via terminal services to your desktop PCs, which is free to download (not including the cost of the server itself), or \$1,188 per user per year for Orange Leap support, training and feature updates from the community. It also offers a hosted version for \$1,668 per user per year, including support. Note that Orange Leap has another hosted product, simply called Orange Leap. This product is somewhat less expensive for somewhat less-robust functionality. As it was just released in March 2009, it did not have the 100 clients to qualify it for inclusion in this report. [See our detailed review in our separate Detailed Reviews of Low Cost Donor Management Systems report.](#)

## Organizers Database (ODB)

by the Organizers' Collaborative, [www.organizersdb.org](http://www.organizersdb.org)

### Installed on PC desktops

This open source system is free for anyone to download, easy to install and provides useful features for organizing groups—it automatically parses street numbers from addresses so you can build a walk list ordered by street names, for example—as well as some nice support for membership organizations. In a number of places the system relies on codes rather than easy-to-read phrases (for example, “Act A1P1” might mean “Actions=Advisory board, Press expert”) that will be easier for experienced system users than novices to decipher, though there's often rollover text to help you translate. There's a quick copy-and-paste method for email addresses, but no ability to mail merge into emails, and no integrated support for online payments. The system runs well on older computers. Installation is a breeze, but with so many potential options, you may want to hire a consultant or have the Organizers' Collaborative set it up for you.

## Results Plus

by Metafile Information Systems, [www.metafile.com](http://www.metafile.com)

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

Results Plus has a friendly, polished-looking interface with a lot of nice features, but querying can be difficult for nontechnical staff. The system offers nice support for custom data entry screens, gifts, grants, relationships and more. All donations and receipts must be entered and run in batch for ease of reconciling with accounting. Donor records are very customizable, with the ability to set up custom data types with multiple fields (for instance, you could set up the ability to track a date, description and hours for each volunteer interaction for a donor). An interesting interface lets you define a list of people (through a query, or one by one) and work your way down it. The query builder is very technical, relying on the user to know or look up unintuitive table and field names, and to then deal with complex query language—but once you've generated the query, you can use it to create both merged letters and emails. The system comes with a wide variety of standard reports, but you can also create new ones through Crystal Reports and display them in the same interface. A feature-rich events module is available at additional cost. The pricing tiers are complicated, based on both the number of users and the number of records. It starts at \$1,000 for a single user and up to 1,000 records. To go beyond a one-user system, it's \$4,000 for three users, plus \$500 per additional user, for an unlimited number of records. Support is available at an additional charge.

## Sage Fundraising 50

by Sage, [www.sagenonprofit.com/products/fundraising/](http://www.sagenonprofit.com/products/fundraising/)

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

Fundraising 50 has a unique interface designed to look like an index card. It's quite clean and usable, with friendly support even for complex functionality like querying, and is likely to appeal to less-technically savvy users. It's one of the strongest systems we reviewed in gift and donor tracking functionality, and also provides support for events, volunteers and membership data, all for the base price. Mail-merged letters, email, reporting and online payment functionality are all solid. The system supports custom fields, but is otherwise somewhat-less-configurable than some systems—all custom fields need to be displayed on specific custom field screens, and there's no way to delete or rename fields. The price is determined solely by the number of licenses purchased. One license is \$3,400; two licenses are \$4,650; and three licenses are \$5,900. The yearly maintenance and support fee is 25 percent of the license cost. [See our detailed review in our separate Detailed Reviews of Low Cost Donor Management Systems report.](#)

## Salesforce.com Nonprofit Starter Pack

by Salesforce.com Foundation, [www.salesforce.com](http://www.salesforce.com)

### Online hosted system

Salesforce is a powerful Constituent Relationship Management system with some basic support for donations out of the box—and it's free to 501(c)(3) organizations for up to 10 licenses. The “nonprofit starter pack” available through the Salesforce Foundation Web site provides a basic template to handle nonprofit and donation data, but it's fairly stripped down. For instance, to associate a donation with a pledge, you must remember to come back and make the connection after the gift is added. There are many options for querying, receipting, segmenting, reporting, exporting and integrating with other systems. The system is very flexible in tracking and displaying all the myriad ways a constituent might interact with an organization, but this flexibility brings complexity with it. It's harder to learn to use than some of the other systems, and many users will want to work with a consultant to get the system set up. Those who are looking for a low investment system with strong donor management features—our target audience for this report—should consider Convio Common Ground, which is a donor management package built on top of the Salesforce platform.

## Salsa

by DemocracyinAction.org, [www.democracyinaction.org](http://www.democracyinaction.org)

### Online hosted system

Salsa is more of an advocacy and online fundraising platform than a donor management system. It offers strong email functionality, tight integration of payment forms and sign-ups with your Web site, and unusual features like support for distributed house parties and peer-to-peer donation tools. However, there's little support for gift types beyond simple donations, such as stock gifts, in-kind gifts or bequeathments, and you must know if a gift you're entering should be associated with a pledge—and if so, enter that information separately. There is no householding, relationship management or any integrated way to generate thank you letters—all letters need to be created by exporting data from the system and mail-merging it externally. If you're primarily interested in advocacy or online fundraising features, and you only need basic donation tracking, Salsa might work. Otherwise, you'll want to look elsewhere for donor management functionality. The system has a number of pricing tiers, starting at \$100 per month (with a one time \$500 setup fee) for the basic system and up to 3,000 donors; all features and up to 25,000 donors is \$400 per month with a \$1,500 setup fee. All packages include support.

## Total Info

by Easy-Ware, [www.easy-ware.com](http://www.easy-ware.com)

### Installed on a local server and available on PC or Mac desktops via terminal services

Total Info is a solid system, particularly for arts organizations looking for an integrated box office solution, but is a bit hampered by some usability issues. It has useful support for gift and donor tracking, emailing, querying and reporting, and for volunteers and events, and it has the most integrated and feature-rich mail-merge functionality of any system we reviewed. Relationship management and prospecting features are also particularly strong. It has only limited online donation capability, but also adds detailed theater-style ticketing and box office functionality—a very unusual feature. Between a fairly technical looking interface, an unusual layout and complex screens, less-technical users may initially find the system a bit overwhelming. You'll likely need a dedicated server if you want to share the system with more than two users, and then each person uses the system from their desktop via Remote Desktop Services. The infrastructure supports any kind of desktop computer, including Macs, but you'll want someone tech savvy to help install and support the system over time. A single user is \$695 (not including the cost of the server), two users is \$1,395, and three or more users is \$2,095. Support is \$240 for each user who needs to be able to call support. [See our detailed review in our separate Detailed Reviews of Low Cost Donor Management Systems report.](#)

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# APPENDIX A: METHODOLOGY

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

## 1. Define vendors to be included

Based on a preliminary scan of the marketplace, we defined that a system should be included in the report if:

- It's intended for use by small organizations as their only database to manage online and offline donors.
- An organization with one user and 500 donors could purchase it for less than \$4,250 in the first year.
- More than 100 organizations in North America had actually purchased it for less than \$4,250 as of October 2008, OR it was released in the last six months by a vendor currently serving more than 1,000 nonprofit organizations.
- It's in use by at least 50 organizations in North America who are not membership organizations, churches or temples (as there are a number of systems intended specifically to support these groups).
- Some official entity (whether vendor or an open source governance group) is proactively managing the continued development of the system.

We widely distributed invitations to vendors to fill out a preliminary survey about their systems, pricing and number of clients in order to be considered for inclusion. In addition, we proactively distributed the invitation via email to: all the vendors listed in NTEN's Donor Management Software Survey (including those written in as "Other") or the Campbell Rinker Donor and Member Database Survey; all donor management vendors identified in NTEN's and Idealware's databases; and all vendors personally known to Holly Ross, Laura Quinn, Eric Leland or Robert Weiner.

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

Based on the data gathered in this preliminary survey, we identified 33 systems that met our criteria. This list of vendors was created prior to soliciting any vendor for funding for the report.

## 2. Interview subject matter experts

In December 2008, Idealware conducted hour-long telephone interviews with nine participants to investigate the primary factors important to nonprofits in selecting low cost donor management systems. Three of these interviewees were consultants who help nonprofits select these systems, and six were nonprofit staff members who had evaluated some of these systems for their own use. Using this data, we identified the key factors that are often important in selecting a system, and a list of frequently considered criteria.

## 3. Complete summary reviews

In January and February 2008, Idealware conducted half-hour demos of all 33 systems included in this report. Each vendor was sent some preliminary questions about their system and a list of six high-level tasks to be demoed; these questions and tasks were designed to investigate the factors most often identified as important. Based on these summary reviews, we created a rough preliminary scoring mechanism to compare the systems, and wrote a paragraph summarizing the strengths and weaknesses of each system.

Each summary paragraph was sent to the system vendor (or official representative) to allow them to flag errors, and revised to ensure there were no inaccura-

cies. Vendors did not have any final approval over their own review, but we allowed them to opt for us to not publish their review at all. Only one vendor chose this option.

## 4. Identify the top systems

We selected 12 top systems to review in more detail based on our rough preliminary scoring mechanism. This scoring mechanism highly prioritized functionality to manage complex gift and donor information and to issue printed acknowledgement letters, but also considered usability, querying and reporting, configurability, managing constituent data beyond donations, and price.

## 5. Complete detailed reviews

For each of the 12 top systems, we conducted two- to three-hour demos based on a list of about 100 ques-

tions identified through our interviews. This data was summarized into a set of 127 standard criteria that we report for each system (in our Detailed Reviews of Low Cost Donor Management Systems document). 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 any final approval over their own reviews.

Review criteria were grouped into 17 categories, and each system was given a rating for each category based on a rating framework (as defined in our How We Rated the Systems section).

After we conducted the detailed reviews, we dropped two systems from our official “top 10” as we could not be sure they were substantively more likely to be useful to those looking for donor management systems than other systems that we did not review in detail.

# APPENDIX B: HOW WE RATED THE SYSTEMS

The ratings for each system shown in the comparison chart were determined based on a detailed review and specific criteria, as shown below. For each category, the rating **None/ Not Applicable** means that it doesn't meet the criteria for a **Fair** rating.

Adding and Tracking Donations		
FAIR	SOLID	EXCELLENT
<ul style="list-style-type: none"> <li>• Lets you quickly search the database for an existing person.</li> <li>• Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.</li> <li>• Lets you enter pledges for future gifts, including the amount and scheduled date.</li> <li>• Can track a note on a gift.</li> <li>• Lets you add freeform notes to a gift.</li> <li>• Lets you associate gifts with an organization, as opposed to individuals.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you quickly enter a number of gifts at one time through a streamlined quick-entry interface OR Lets you easily map and import donor and gift information in custom file formats.</li> <li>• Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you find a person by searching data entered into custom fields.</li> <li>• When using the interface to add new gifts, the system asks if you want to apply them against existing pledges.</li> <li>• Lets you quickly enter a number of gifts at one time through a streamlined quick-entry interface which can be tailored with the appropriate fields and defaults for a particular set of gifts.</li> <li>• Lets you easily map and import donor and gift information in custom file formats without additional charge.</li> <li>• The system can create a full set of pledges based a payment schedule, which you can then customize as needed.</li> </ul>
Managing Donor Information		
FAIR	SOLID	EXCELLENT
<ul style="list-style-type: none"> <li>• Lets you track at least four phone numbers and addresses for each donor, label them (for example, "office" and "cell phone"), mark the primary number and address, and track the donors' preferred contact methods.</li> <li>• Lets you track relationships between donors and label them (for example, "family member," "co-worker") with custom relationship types.</li> <li>• Lets you keep a manual log of communications such as phone calls or personal meetings.</li> <li>• Lets you mark that a particular person should not be contacted.</li> <li>• Lets you track the source of a particular donor.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you create a profile for an organization and track the people who work for it.</li> <li>• Automatically stores a record of all system-generated letters and emails for each donor.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you track people's seasonal addresses with effective dates, and automatically switches primary addresses for the appropriate timeframe.</li> <li>• Lets you track connections between donors and as many of your own staff members as you like, along with what staff member is responsible for the relationship.</li> <li>• Lets you easily see all recent communications and donor actions on one screen.</li> <li>• Provides specific householding functionality to allow you to easily segment out in a query a list of who should be mailed.</li> <li>• Lets you easily see, in one click or less from the main donor page, all recent gifts, the number and amount of gifts this year, and total giving.</li> <li>• Lets you define directional relationships between donors ("boss; works for...") and the system automatically assigns the appropriate relationships for both donors.</li> </ul>

## Prospecting and Proposals

FAIR	SOLID	EXCELLENT
<ul style="list-style-type: none"> <li>• Lets you assign both a priority and a stage to a donor to manage a prospecting workflow, at least through custom fields.</li> <li>• Lets you create a reminder for yourself for a particular task and date.</li> <li>• Lets you easily see the list of donors assigned to you as a solicitor by running a segmentation report.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you assign both a priority and a stage to a donor to manage a prospecting workflow without custom fields OR Lets you define and track a custom workflow.</li> <li>• Lets you create reports that show all the asks that have been made.</li> <li>• Lets you track what proposals are due, what you've submitted and what has already been approved by a particular foundation OR Lets you track a particular foundation's interest areas based on your organization's custom categories of interest.</li> </ul>	<ul style="list-style-type: none"> <li>• Provides advanced built-in functionality to track prospects OR Provides detailed extensive functionality to define and track a custom workflow.</li> <li>• Can see reminders you or others have set prominently displayed at the appropriate time.</li> <li>• Automatically matches donor information to outside resources in order to provide more information on giving capability OR Provides historical analysis of past estimates to help you improve estimates.</li> </ul>

## Permissions

FAIR	SOLID	EXCELLENT
<ul style="list-style-type: none"> <li>• Can define multiple user groups that have different access to system functionality.</li> </ul>	<ul style="list-style-type: none"> <li>• You can grant individuals access to granularly view, edit or delete data for a wide variety of system functions.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you define user or group permissions on a field-by-field basis.</li> </ul>

## Mail-Merging Letters

FAIR	SOLID	EXCELLENT
<ul style="list-style-type: none"> <li>• Can mail merge data into letter templates without exporting data from the system.</li> <li>• Lets you print letters through the system for a particular group of people who meet a sophisticated set of criteria.</li> <li>• Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.</li> </ul>	<ul style="list-style-type: none"> <li>• Automatically logs for each donor that a letter was sent when you confirm that a batch of letters were printed.</li> <li>• Lets you easily mail merge and print a single thank you letter from the gift entry interface by choosing from a number of letter templates.</li> <li>• Lets you easily print labels for a set of people from the same query result page used to print letters.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you create letters that include custom gift strings based on a donor's previous giving history.</li> <li>• Lets you flexibly create letter templates in Word with complete control over layout, formats, logos and images.</li> <li>• Lets you build a queue of people to be thanked by marking them at gift entry. You can then create letters for everyone in the queue at once.</li> </ul>

## Emailing

FAIR	SOLID	EXCELLENT
<ul style="list-style-type: none"> <li>• Lets you easily send email to particular individuals from their donor records.</li> <li>• Lets you send email through the system to a group of people who meet a sophisticated set of criteria.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you create and save graphical email templates to use in emailing groups OR Lets you schedule email to send in the future.</li> <li>• Lets you create individual and group email that includes both standard text and "mail merge" type inserted data.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you create and save graphical email templates to use in emailing groups.</li> <li>• Lets you schedule email to send in the future.</li> <li>• Emails are sent through the vendor's email server, protecting you from blacklisting issues, and the vendor takes a series of steps to ensure email goes to donors' inboxes rather than their Spam filters.</li> <li>• Donors can easily unsubscribe from emails without involving the organization.</li> <li>• Lets you see the open rate, click-through rate and unsubscribe rate for each email.</li> </ul>

Querying		
FAIR	SOLID	EXCELLENT
<ul style="list-style-type: none"> <li>• Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts and number of gifts this year compared to prior years.</li> <li>• Lets you save queries to be run again later.</li> <li>• Once you have created a list, you can mail merge letters to that list, email to that list, update any field in the database for the list, or export the list.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you query using criteria from any database field, including custom fields if included in the system.</li> <li>• Lets you create complicated queries using an unlimited number of criteria connected with logical “ands” and “ors”.</li> <li>• Lets you easily limit or expand a query after you’ve generated the list by saving the query and editing it again.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you create powerful queries with comparative ease.</li> </ul>
Reporting		
FAIR	SOLID	EXCELLENT
<ul style="list-style-type: none"> <li>• Lets you easily generate prepackaged reports, including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This one (LYBUNTI) or donors from Some Year but Unfortunately Not This one (SYBUNTI).</li> <li>• Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you save reports that you create or modify.</li> <li>• Lets you compare success metrics for a number of different campaigns.</li> <li>• Lets you export any report to a CSV or Excel format.</li> </ul>	<ul style="list-style-type: none"> <li>• Supports ad hoc reports within the system which can include and filter by nearly any field displayed to users, including custom fields.</li> <li>• Lets you quickly view favorite reports without navigating a much-larger set.</li> </ul>
Payment and Web Site Integration		
FAIR	SOLID	EXCELLENT
<ul style="list-style-type: none"> <li>• Lets you charge donors’ credit cards within the system.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you set up an online payment form on your Web site and pull online payments automatically into your database, without the need for a programmer.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets people easily sign up for your email list via an integrated sign-up form on your Web site.</li> <li>• Lets donors set up recurring payments online (such as monthly donations) which are automatically charged to their credit cards.</li> <li>• Lets you accept online registration fees for events, including multiple ticket prices (such as a VIP ticket) and meal options.</li> <li>• Lets members pay membership dues online.</li> </ul>
Tracking Events		
FAIR	SOLID	EXCELLENT
<ul style="list-style-type: none"> <li>• Lets you track who has registered for a particular event, potentially with custom fields intended to track custom interactions.</li> <li>• Lets you easily create nametags for an event.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you track who has registered for a particular event without using custom fields.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you track non-paying guests for particular events, and distinguish them from those who paid.</li> <li>• Lets you manage table details for an event, including seating arrangements, and the amount of gifts raised per table.</li> </ul>

## Tracking Other Built-In Interactions

FAIR	SOLID	EXCELLENT
<ul style="list-style-type: none"> <li>Provides at least substantial custom field functionality to allow you to reasonably support some basic volunteer or membership information.</li> </ul>	<ul style="list-style-type: none"> <li>Provides two of the following:                             <ul style="list-style-type: none"> <li>Lets you log volunteer activity for supporters, including date, duration and tasks.</li> <li>Provides functionality to track member levels, payments and expiration dates.</li> <li>Provides substantial built-in support for at least one interaction not covered in the report.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Provides three of the following                             <ul style="list-style-type: none"> <li>Lets you track a detailed profile of someone's interests and aptitudes, in order to match volunteers to jobs.</li> <li>Lets you log volunteer activity for supporters, including date, duration and tasks, as well as the dollar equivalent for their time.</li> <li>Provides functionality to track member levels, payments and expiration dates.</li> <li>Provides substantial built-in support for a number of interactions not covered in the report.</li> </ul> </li> </ul>

## Customization

FAIR	SOLID	EXCELLENT
<ul style="list-style-type: none"> <li>Lets you customize drop-down values for fields such as campaigns, type of relationships and many others.</li> <li>Lets you add at least a few custom fields.</li> </ul>	<ul style="list-style-type: none"> <li>Lets you add at least 50 custom fields.</li> <li>Custom fields can be placed on many screens in the system.</li> <li>Lets you create your own custom interactions, in order to track multiple pieces of data about a single interaction OR Vendor often adds fields or features to customer requests without charge.</li> </ul>	<ul style="list-style-type: none"> <li>Lets you create your own custom interactions, in order to track multiple pieces of data about a single interaction, without the need for a programmer.</li> <li>Lets you move existing fields within the interface, or delete them altogether.</li> </ul>

## Integration

FAIR	SOLID	EXCELLENT
<ul style="list-style-type: none"> <li>Can export all data visible to users and import donor and gift data OR Provides a method to allow a programmer to create custom data feeds to an external system.</li> </ul>	<ul style="list-style-type: none"> <li>Lets you export all data visible to users into another file format.</li> <li>Lets you map different files of donor and gift information to the proper fields in the system, among a variety of fields, and import the data.</li> <li>Lets you import data without an additional charge.</li> </ul>	<ul style="list-style-type: none"> <li>Lets you export all data visible to users into another file format.</li> <li>Lets you map different files of donor and gift information to the proper fields in the system, and import the data.</li> <li>Provides a method to allow a programmer to create custom data feeds to an external system, with access to most fields in the system.</li> </ul>

## Accounting Support

FAIR	SOLID	EXCELLENT
<ul style="list-style-type: none"> <li>Can export transactions in order to sync them with an accounting system.</li> </ul>	<ul style="list-style-type: none"> <li>Can create and track accounting batches in order to ease the reconciliation process with an accounting system.</li> </ul>	<ul style="list-style-type: none"> <li>Can mark a batch of payments as "reconciled with accounting."</li> <li>There are controls in place to prevent unauthorized people from editing a payment that has already been reconciled.</li> </ul>

Ease of Use		
<b>FAIR</b>	<b>SOLID</b>	<b>EXCELLENT</b>
<ul style="list-style-type: none"> <li>• Users can use the system, given enough training.</li> </ul>	<ul style="list-style-type: none"> <li>• The system is at least Moderately easy to use for both novices and experts.</li> </ul>	<ul style="list-style-type: none"> <li>• The system is at least Moderately easy to use for both novices and experts, and is Easy for one of these.</li> </ul>
Support and Training		
<b>FAIR</b>	<b>SOLID</b>	<b>EXCELLENT</b>
<ul style="list-style-type: none"> <li>• Training and support is available, at least from the community.</li> <li>• Provides written documentation.</li> </ul>	<ul style="list-style-type: none"> <li>• Provides extensive documentation, including online documentation, a user community or videos.</li> <li>• Training and support is available from vendor, potentially at an additional charge.</li> </ul>	<ul style="list-style-type: none"> <li>• The vendor provides initial training over the Internet at no additional cost.</li> <li>• The vendor provides phone support for under \$500 per year.</li> </ul>
Ease of Installation and Maintenance		
<b>FAIR</b>	<b>SOLID</b>	<b>EXCELLENT</b>
<ul style="list-style-type: none"> <li>• The system can be installed and maintained by a reasonably qualified IT staff.</li> </ul>	<ul style="list-style-type: none"> <li>• As is typical with an installed system, you will need to install the system to your desktops, maintain your own infrastructure, and install your own updates.</li> </ul>	<ul style="list-style-type: none"> <li>• As is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain.</li> </ul>
Product Background		
<b>FAIR</b>	<b>SOLID</b>	<b>EXCELLENT</b>
<ul style="list-style-type: none"> <li>• The vendor reports more than 100 clients.</li> </ul>	<ul style="list-style-type: none"> <li>• The system has been in use for more than three years OR The vendor reports more than 500 clients.</li> <li>• The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.</li> </ul>	<ul style="list-style-type: none"> <li>• The vendor reports more than 1,000 clients.</li> <li>• The system has been in use for more than five years.</li> </ul>

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# APPENDIX C: AUTHORS AND CONTENT CONTRIBUTORS

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## Authors

### **Eric Leland, FivePaths**

Through his work at FivePaths, Eric consults with small- and medium-sized organizations to help them choose and implement appropriate technology solutions—including donor management systems. Eric conducted all of the initial interviews for this report, some of the summary reviews, all of the detailed reviews, and participated in analyzing, structuring and reviewing all report information. Eric has implemented CiviCRM, eTapestry, Giftworks, Metrix, Organizers Database, Salesforce.com and Salsa by DemocracyInAction for clients, and has additionally evaluated Donor Perfect, Neon by Z2, Sage Fundraising 50 and Telosa Exceed.

### **Laura Quinn, Idealware**

Laura is the Executive Director of Idealware. She defined the methodology used for the report, wrote all interview and review questions, conducted some of the summary reviews and led all the analysis, recommendations, writing and comparisons in the report. She has used Salsa by DemocracyInAction extensively as Idealware's constituent database, evaluated Salesforce.com for Idealware's use, and has been interviewed by the Metrix team (prior to the foundation of Idealware) for input into their system design. Other than that, she has no experience using or implementing any of these systems.

### **Chris Bernard, Italics Media**

Chris, a freelance writer at Italics Media, edited all of the text throughout the report. He has no experience using or implementing any of these systems.

## Contributors

### **Jenny Council, netCorps**

As a netCorps consultant, Jenny provides independent assistance with technology planning, selection, implementation and support, primarily to smaller nonprofit organizations. She has worked on a number of donor management selection and implement projects, including particularly substantial work with Salesforce.com and DonorPerfect. Jenny was interviewed for this report, and reviewed both the scenarios used in the recommendations section and a draft of the final report.

### **Shawn Michael, TACS/ NPower Oregon**

Shawn assists both small and large nonprofit organizations with technology planning, database development, training and planning implementation. She reviewed both the scenarios used in the recommendations section and a draft of the final report.

### **Dan Shenk-Evans, Community IT Innovators**

Dan has worked with about 50 different nonprofits—ranging from 3 to 75 staff members—to evaluate and implement donor, CRM, association membership, and accounting systems. He was interviewed for this report, and reviewed both the scenarios used in the recommendations section and a draft of the final report.

### **Robert Weiner, Robert L. Weiner Consulting**

Robert is an independent consultant who has worked with a wide range of organizations—about 60 different clients, from small advocacy organization to large higher education groups—to define fundraising strategies and select donor management systems. He contributed to the laundry list of vendors invited to participate in the report, was interviewed, and reviewed both the scenarios used in the recommendations section and a draft of the final report. He has helped clients select about 10 different systems listed in this report, as well as more complex, expensive systems.

We are also grateful to the five nonprofit staff members who were interviewed to help us understand the factors that are typically important to nonprofits in choosing a low cost donor management system.



**Because people who change the world need the tools to do it.**

## About NTEN: The Nonprofit Technology Network

### What we believe

NTEN aspires to a world where all nonprofit organizations skillfully and confidently use technology to fulfill their missions. As the membership organization for the nonprofit technology community, NTEN plays a unique role in this field. Our work is to connect our members and provide you with learning and professional development. We give a bird's-eye view of the trends, issues, and opportunities that influence nonprofits' use of technology. Our ability to see the big picture and context allows us to identify common areas of opportunity and organize for action.

### What we do

NTEN is a community of peers who share technology solutions across the sector and support each other's work. We enable our members to embrace advances in technology confidently through on- and off-line knowledge sharing, hands-on trainings, and research and industry analysis. Our discounts help our members stay up-to-date with changing technology and valuable resources. We offer news and pioneering industry research and are a channel for the dissemination of innovation and learning in this field.

### NTEN WEBINARS / [nten.org/webinars](http://nten.org/webinars)

NTEN hosts many online trainings and discussions each month on topics related to nonprofit technology.

### ONLINE NETWORKING / [groups.nten.org](http://groups.nten.org)

Do you want to connect with other nonprofit webmasters, talk about open source CMS tools with others passionate about them, or learn ways to use Flickr in your next campaign? Then join one of these NTEN Affinity Groups (or a few of the more than 90 others) and start talking.

### NTEN EVENTS / [nten.org/events](http://nten.org/events)

Attend our conferences and local meet-ups where people like you come together to share experiences, learn, network, make deals, and have some fun.

### NTEN Research / [nten.org/research](http://nten.org/research)

Our industry-leading research is growing and expanding. We have recently published studies on IT Salaries and Investments in the nonprofit sector, the impact of technology consulting, and the challenges of data integration and Open APIs.

### NEWSLETTERS / [nten.org/signup](http://nten.org/signup)

NTEN Connect is your opportunity to read about the latest issues from a variety of viewpoints.

### NTEN BLOG / [nten.org/blog](http://nten.org/blog)

NTEN's blog is the place to find out about the latest resources, nonprofit tech news, and buzz from the NTEN community.

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This 60-page report provides compares four free and open source systems that can help you to build and manage a Web site. We provide both a feature summary and detailed reviews, as well as a directory of consultants.



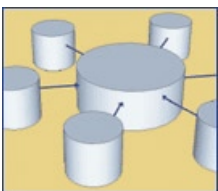
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## Should Your Organization Use Social Networking Sites?

Are social networking sites like MySpace or FaceBook likely to be a good fit for your nonprofit's goals? Brett Bonfield outlines some guidelines to help you decide if social networking is right for you.



## Creating the Relationship-Centric Organization: Nonprofit CRM

Are you storing data about your constituents in three, five, even 10 different databases? If so, you're not alone – but it's costing you in time, lost revenue and decreased impact. Paul Hagen describes how to get all your data into one place with an integrated CRM strategy.

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# CONSULTANT DIRECTORY

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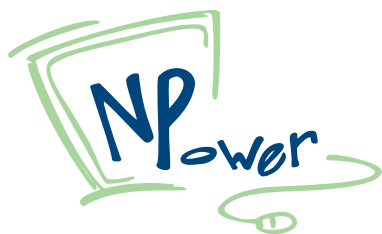
Choosing a system can be complicated, and someone with experience defining requirements and evaluating products can be helpful. To help you find a consultant, we've compiled a number of the people and organizations that offer services in this area.

**Each of these service providers paid a fee to be included.** Those with logos and descriptions paid more to include these elements. Neither Idealware nor NTEN has assessed the services provided—we've only aggregated the information given to us. Conduct your own due diligence before hiring any consultant.

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## NPower

[www.npower.org](http://www.npower.org)



**Putting technology know-how in the hands of nonprofits**

Simon Moloney, 212.564.7010 or [info@npower.org](mailto:info@npower.org)

## Robert L. Weiner Consulting

[www.rlweiner.com](http://www.rlweiner.com)



**Strategic Technology Advisers to Nonprofits and Educational Institutions**

Robert Weiner, 415-643-8955 or [robert@rlweiner.com](mailto:robert@rlweiner.com)

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## Harman Interactive, LLC

[www.harmaninteractive.com](http://www.harmaninteractive.com)

Betsy Harman, 773-728-4194 or [betsyharman@earthlink.net](mailto:betsyharman@earthlink.net)

## The Alford Group

[www.alford.com](http://www.alford.com)

Debbie Marchione, 206-548-0451 or [info@alford.com](mailto:info@alford.com)

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## SF Consulting

[www.sfconsultingnow.com](http://www.sfconsultingnow.com)

Scott Fendley, 317-445-0948 or [scott@sfconsultingnow.com](mailto:scott@sfconsultingnow.com)

## Management Solutions

[www.msnonny.com](http://www.msnonny.com)

Duff Batchelder, 914-779-4497 or [info@msnonny.com](mailto:info@msnonny.com)

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