A CONSUMERS GUIDE TO CONSTITUENT RELATIONSHIP MANAGEMENT SYSTEMS (CRM) FOR PUBLIC MEDIA

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FOREWORD

There are two words that strike fear into the hearts of every public media professional: "CRM conversion."

It's expensive, it's time-consuming, it's exhausting... and if you're going to take the plunge, you want your new system to not only be awesome, but to also give your station the capacity to grow revenue and engagement opportunities.

After all, that's what's behind your decision: Your mission to serve your supporters and your community at large.

The first step of a CRM conversion is to listen closely to your colleagues and think critically about what your organization needs from a new system. Next, with this guide from Tech Impact's Idealware, we're hoping to save you significant time, and perhaps even some pain, by thoroughly examining the capabilities of the four most-used systems as they specifically pertain to public media fundraising, and lists others to consider as well.

It's a tool to compare and contrast, to think through issues you may not have imagined at the start, and to get you excited about your future, post-conversion.

We look forward to hearing from you about the guide, and be in touch with questions too!

All the best,

Joyce MacDonald, President & CEO
Greater Public

HOW WAS THIS REPORT FUNDED?

This report was funded by Greater Public and researched and written by Tech Impact's Idealware.

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INTRODUCTION

This publication is the most recent edition of *A Consumers Guide to Constituent Relationship Management Systems (CRM) for Public Media*.

The last edition, published in 2013, examined 10 systems in detail and compared them against each other for how well they met the requirements criteria of users.

Those systems included the following:

- Allegiance Fundraising
- CiviCRM
- ClearView CRM
- Enterprise for Public Media
- iMIS 20
- Luminate CRM
- MemberNation
- The Raiser's Edge Enterprise
- roundCause
- Tessitura

The list of systems covered by this updated edition of the *Consumers Guide* is notably smaller. Two systems have been acquired since the 2013 report—Blackbaud acquired Luminate CRM, and Salesforce acquired roundCause—and we eliminated another system, Enterprise for Public Media, because it has no public website and is not a viable system for this audience.

We further narrowed the list based on results of a survey asking Greater Public members which CRM systems they were using. CiviCRM, ClearView CRM, and MemberNation were not being used by a single member, so we dropped them from consideration.

Just two stations were using iMIS 20, so we moved that to our secondary list of systems along with other software options reported by at least one member station.

That left three systems from the original list: Allegiance Fundraising, Blackbaud's The Raiser's Edge (now called The Raiser's Edge NXT), and Tessitura. Since several member stations also reported using Salesforce (represented previously by roundCause), we also added that to the list.

> ***"We believe the four systems included in this publication are the most compelling solutions available today depending on each station's particular needs."***

All four systems have a substantial customer base and actively serve public media customers. Their vendors have development and customer service teams of sufficient size to meet the needs of public media organizations.

Therefore, we believe the four systems included in this publication are the most compelling solutions available today depending on each station's particular needs.

How Did We Review the Systems?

Once we had our list of systems, we spoke to staff members from seven different public media organizations across the country that represent each of the four core systems on that list. In those conversations, we discussed each system in depth, and asked about those stations' migration process when they first implemented the systems and their experiences with the ongoing use of those systems.

Based on the data gathered during those conversations, we reached out to the vendors of the four systems on the list and spoke with them at length to understand the strengths of each and to track those systems' evolution since the last edition of the Consumers Guide.

MARKETPLACE OVERVIEW

Two factors are needed to understand the current state of the CRM market for public media: the maximum size of a market matters, and software companies benefit from scale.

Market size refers to the total number of public media stations that need CRM systems, not the number of people these stations serve.

In the U.S., that means approximately 350 television stations and 900 radio stations. Because public media organizations often operate more than one station, the number of potential CRM customers is actually fewer than 1,200.

Put another way, if a vendor were to make an ideal system that meets every CRM need of a public broadcast station, at most it would have 1,200 customers.

But software vendors seek scale. Especially in the modern Software-As-a-Service, cloud-based era, some solutions can be used by thousands of people—or even millions. This scaling began in the consumer market (Google, Amazon, and Facebook, for example) but software that serves organizations has followed a similar path (Office 365, G Suite, Amazon Web Services, and Intuit, for example).

These two factors—the static market size and vendors' need for scale—can help explain the changes that have affected the vendor base since the 2013 edition of this publication.

"if a vendor were to make an ideal system that meets every CRM need of a public broadcast station, at most it would have 1,200 customers."

Some of the systems in that report have since been acquired, while others have stopped actively pursuing customers in the public media space.

While the market size and need for scale make it unlikely that new companies will form for the sole purpose of serving public media sector CRM needs, the four solutions in this report each offer a distinct value proposition to public media stations.

You'll also find a list of other software systems currently being used by at least one station that might meet your needs, should you wish to look beyond the core list. We've grouped them into two categories: "CRM/Donor Management Systems," which includes those that primarily serve donor management needs; and "Other Systems," which includes both standard database solutions and data systems most often used in university settings.

KEY FEATURES AND FUNCTIONS ▶▶▶

A Customer Relationship Management (CRM) system is a type of database that helps people in an organization manage constituent information. In contrast to a simple list, such as in a spreadsheet, a CRM system can manage multiple records related to each constituent. For example, a CRM system should be able to track all the details related to a donation, an event registration, and contact method preferences (e.g., mail, phone, or email) for each constituent record—not just *storing* that data, but making it easy to search and find it to make it useful. All of those details can be tricky to track in a spreadsheet.

These days nearly every CRM system will help you track basic information, such as names, salutations, multiple addresses, multiple contact methods, and relationships to other people and organizations (spouses or places of work, for example). And all of the systems featured in this report will let you send email designed to be read not only on desktops or laptops, but also on smartphones and tablets.

But there are additional requirements specific to public media use that stations should consider when reviewing systems—for example, they should track donations and pledges, and help manage major gifts processes.

Most CRM systems eliminate the need to rekey financial data by letting you export data to your financial system. Some can incorporate data from constituent activity on your website or external social media services, such as Facebook or Twitter, but it's not yet a widespread functionality.

Additional features can be incorporated using third-party add-ons. For example, many CRMs rely on third-party systems for mass email communications, event management, or wealth screening.

To serve public media station data needs well, a CRM solution needs specific depth in four key areas:

- Sustaining memberships
- On-air fundraising processes
- Underwriting
- Multi-organization management

Based on our conversations with users, these are the four features most widely used by public media stations in addition to basic CRM functions.

As you consider the options, pay close attention to how well each vendor delivers in each of these areas to best meet your needs.

> ***"If a vendor were to make an ideal system that meets every CRM need of a public broadcast station, at most it would have 1,200 customers."***

Sustaining Memberships

Many public media stations rely on sustaining memberships for a significant portion of the organization's income. But not every standard CRM system handles this process smoothly or well.

In an ideal world, a CRM would make it possible for sustaining members to select a recurring date (or day) to be billed each month when they sign up online. It would also let them choose the amount of their recurring gift or renewal and enter a credit card, direct debit, or other method of payment, and help station staff thank them for the membership and provide any required documentation for tax purposes.

But in reality, CRM systems handle sustaining membership upgrades, downgrades, and renewals to varying degrees of success. For example, a member switching from a monthly payment of $10 to $20 (or vice versa) may require an adjustment and/or additional reporting in financial accounting systems. When considering systems, pay attention to their transaction processing workflow and to which systems they support (not every system works with every available payment processor).

Be sure to walk through your sustaining membership process with someone familiar with any system you might be considering. If it doesn't meet your exact needs, a minor change to your organization's membership management process might be enough.

On-Air Fundraising Management

Most public media organizations will want a system that helps handle on-air fundraising processes. Typically, these involve a variety of goals set for specific time periods, processing memberships received or renewed during a specific time, and often on-air recognition of progress and/or individual donors. All of these functions differ significantly from standard CRM systems due to timing and speed.

For example, while a daily donor report may suffice for many nonprofit fundraising campaigns, public media campaigns typically prefer to recognize progress on-air in near real-time—something standard CRM systems are not necessarily set up for.

Incentive and inventory management also differ from conventional membership systems. In an on-air drive, public media stations might offer items such as DVDs or T-shirts to people during particular program time periods, making inventory management and proper tracking of incentives to be fulfilled for each member essential.

Underwriting

Underwriting includes identifying prospects, crafting proposals, tracking the status of requests, and generating and receiving agreements for funding and recognition. In short, it requires CRMs to be able to handle what for-profit organizations might identify as a "sales and recognition" process. But not every CRM system allows for underwriting management.

In many cases, major donor management modules can be adapted for underwriting, but an ideal system would include the ability to manage the whole underwriting proposal, negotiation, pledge, payment, and on-air recognition process well.

Multi-Organization Memberships

As we already mentioned, many organizations manage more than one radio or television station. In those cases, they may also need their CRM system to manage multi-organization membership structures. For example, an organization might operate two different radio stations along with a television station—it might want a CRM system that can handle multiple levels of membership options across the various combination of stations (e.g., radio, television, radio and television, or membership for all).

HOW TO USE THIS GUIDE TO SELECT A CRM SYSTEM ▶▶▶

Selecting the right software is a process, and not one to be rushed into or taken lightly. There are a number of resources detailing the best practices for selecting systems in general, but the following steps can help guide you through using this publication in a way that ensures you make the right choice for your needs.

1. Create a team to identify needs.

Who should be involved in the entire selection and implementation process? Typically, people who handle membership, marketing, communications, on-air fundraising drives, volunteers, events, and transaction processing, as well as anyone who relies on reports or information from the system (e.g., board and/or staff leaders). In the smallest organizations, this team might be three or four people; in larger ones, it might be a committee of 10 or more.

2. Define essential features.

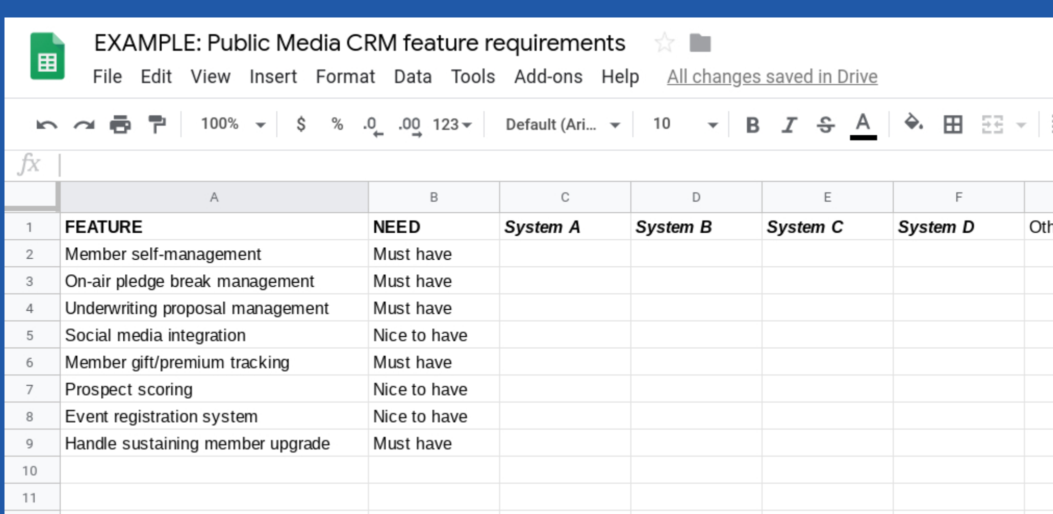
An easy way to track this is to create a collaborative spreadsheet (Google Sheets or Office 365, for example). Use the rows to list your desired features, and use the columns to track whether each is a "must have" or just a wish item. Create a third column for notes. You can also use a dry erase board or sticky notes—the format is not nearly as important as the process of involving a group of people who will deliberate deeply about the organization's processes and information needs.

3. Explore the systems featured in this guide.

The four systems covered in this publication are those we believe are most able to meet the CRM needs of public media organizations.

Allegiance Fundraising provides a CRM system built expressly to meet public media organization needs. Today, the company also offers fundraising as well as loyalty and incentive services. Of the four, Allegiance has the longest history of serving the public media sector.

Blackbaud's offerings, most notably **The Raiser's Edge NXT,** are often used by larger nonprofit organizations as well as in college and university settings. Of the four, this may be the system most familiar to experienced fundraising professionals.



FEATURE	NEED	System A	System B	System C	System D	Othe
Member self-management	Must have					
On-air pledge break management	Must have					
Underwriting proposal management	Must have					
Social media integration	Nice to have					
Member gift/premium tracking	Must have					
Prospect scoring	Nice to have					
Event registration system	Nice to have					
Handle sustaining member upgrade	Must have					

Sample CRM Feature Grid

Use the rows to list your desired features.

Use the columns to track whether each is a "must have" or just a wish item.

Create a third column for notes.

Salesforce offers people the ability to customize the system to their needs. Of the four, Salesforce easily has the widest adoption within for-profit companies and is the most flexible solution.

And **Tessitura,** a nonprofit with experience serving arts and cultural organizations, also serves public media organizations. Of the four, Tessitura is the only vendor structured as a nonprofit organization with a mission to serve its user community.

Read through the descriptions and detailed comparisons elsewhere in this report to get a sense of each system's current context and capabilities.

4. Review the longer list of alternatives.

It's possible that none of the four systems will align with your particular needs for one reason or another, or that you're primarily interested in a donor management system or more generalized CRM solution. If that's the case, be sure to review the list of additional systems currently in use by Greater Public members, according to survey results. Some of these are quite powerful, widely used, and well supported.

5. Consider connectivity and integration.

Don't limit your review to the core capabilities built into each system. Consider, too, how each supports connections to other software, such as email marketing, ticketing, or event management systems. Most modern systems enable an Application Programming Interface (API), which allows the system to exchange data with third-party systems. An open API means that you should be able to build a solution you need to move data between two systems in near real-time.

The best systems allow you to use this capability to connect the system to any software you like. However, some systems limit these connections to selected partners, while older systems lack API support entirely.

Capabilities vs. Practice

All four vendors of the systems included in this guide tout the capabilities of their respective systems to help organizations manage customer information and engagement. To test how well their own systems worked, we went to each of their websites to request a demo, and filled out an online form or sent an email to the address provided there.

The responses were not impressive. Of the four vendors, only one responded to our request within 24 hours (Tessitura). After a week, we still hadn't heard from the other three vendors and had to reach them using other channels that might not be available to potential customers.

The experience offered an important reminder that system features are just capabilities. No matter which system you choose, you also have to ensure that people in your organization are ready to respond when customers seek to engage. If a system captures a customer request but staff fail to act on it, the system doesn't really matter—even the most sophisticated system is useless if a process isn't in place to ensure that people respond.

6. Solicit input and feedback from peers.

After you define your needs and explore existing options, talk to your peers. A conversation with people at an organization similar to your own can provide valuable insight into the capabilities and challenges of different systems. It can also give you a practical perspective as to how people perceive the customer service and support from a vendor. (Greater Public can help you identify stations that use a particular system or platform.)

7. Project upfront and ongoing costs.

Moving to a new CRM system is an investment of time and cost. This isn't a decision you'll want to revisit each year. Ideally, you'll use the new system as the central source of customer information and interaction for your organization for a long time to come.

Price matters, but it should be put into the right context. How valuable is it for your organization to be able to identify every interaction that a sustaining member has had with your organization? Or identify which members are most likely to upgrade? Or to immediately be able to provide PBS Passport credentials?

A CRM system is an investment that can help your team serve your community quickly and efficiently.

When projecting costs for the implementation, remember to include direct fees paid to the vendor as well as consulting, support, training, and ongoing staff time and expenses.

8. Plan for data migration.

Moving to a new CRM means migrating all your data into it. This process can be complex, and migration times vary, most organizations should expect four months to a year for the systems in this guide, according to the vendors. The length of time can vary based on scale and complexity. We spoke to some people whose migrations took longer, often because the staff chose to handle pieces of the process on their own.

Designate a point person to help move migration along. This person, whether a member of the staff or an external project manager, needs to understand both databases and people, and to have sufficient influence to make tasks happen in a timely manner. A skilled project manager can help turn what might be a painful process into a smooth data migration success story.

CRM SYSTEMS FOR PUBLIC MEDIA

The following section provides a closer look at the four systems covered by this report, beginning with the chart on the next page, which compares them on key functions for public media.

Beginning on page 15, we distill the key details of each system into a few descriptive paragraphs in which we attempt to convey the essential aspects along with features that differentiate it from other alternatives.

After each product summary, we provide a long list of features and functionality designed to help you understand how each system might meet your needs in the following areas:

- Constituent Tracking
- Membership Management
- Fundraising and Campaigns
- Pledge Drives and On-Air Fundraising
- Communications Management
- Event Management
- E-Store/Inventory (Member Gift/Premium Management)
- Transactions and Payments
- Customer Service
- Underwriting
- Digital Engagement Tracking
- Reporting and Querying
- Data Cleanup
- System Integration
- Technical and Permissions
- Usability
- Support and Documentation

If a specific feature, such as event management, is important to you and your organization, read the details from each of the four vendors to understand how each system varies in its approach.

A Note About Pricing: We requested pricing details from each vendor. Responses varied. Where possible, we included information about each system's general pricing approach. This is one area in which we encourage software vendors to improve, as increased pricing transparency can only help increase credibility. Pricing for optional and/or add-on features may vary. Make sure to verify current pricing for desired options and add-ons with the system provider as well as third-party vendors.

SYSTEM COMPARISON CHART

	Allegiance Fundraising	The Raiser's Edge NXT	Salesforce	Tessitura
Constituent Tracking	Yes	Yes	Yes	Yes
Membership Management	Yes	Yes	Yes	Yes
Fundraising and Campaigns	Yes	Yes	Yes	Yes
Pledge Drives/ On-Air Fundraising	Yes	Some + Third-party apps	Some, with customization	Yes, with customization
Communications Management	Yes	Some + Luminate Online	Some + Pardot, Marketing Cloud or Third-party apps	Yes, with Third-party apps
Event Management	Yes	Yes	Yes	Yes
E-store/Inventory (Gifts/Premiums)	Yes + Third-party apps	Third-party apps	Some, with customization or Third-party apps	Yes, with Third-party apps
Transactions and Payments	Yes	Yes	Third-party apps	Yes
Customer Service	Some	Some	Salesforce Cases, Chatter, or Third-party apps	Some
Underwriting	Allegiance Traffic & Corporate Support System	Some	Yes	Some
Digital Engagement Tracking	No	Luminate Online, Attentive.ly	Marketing Cloud Social Studio + Third-party apps	Some, with Third-party apps
Reporting and Querying	Yes	Yes	Yes	Yes
Data Cleanup	Some	Yes	Yes	Yes
System Integration	Some	Some	Yes	Some
Technical and Permissions	Yes	Yes	Yes	Yes
Usability	Moderate	Moderate	Moderate	Moderate
Support and Documentation	Yes	Yes	Yes	Yes
Third-Party App Partners	www.alliegiancefundraising.com/about-us/partners-affiliations	www.blackbaud.com/partners/find-partners	appexchange.salesforce.com	www.tessituranetwork.com/services/partnerships

ALLEGIANCE FUNDRAISING

allegiancefundraising.com / @allegiancefrg

Allegiance Fundraising Group offers software and services to public media organizations. It formed in 2017 from three separate organizations that served more than 400 clients in the public media market going back more than 35 years. The services side offers fundraising and direct response expertise as well as loyalty and incentive program management. In the past few years, the company has also acquired a direct mail marketing firm and a print and digital marketing company. In 2019 the company acquired WeDidIt, which provides crowdfunding and peer-to-peer fundraising tools, donation pages, simple ticketing, and text-to-donate tools.

Historically Allegiance has tuned its CRM system to meet public media organization needs. For example, it offers a web page for staff use during pledge drives that provides a real-time feed of recent donations, goal information, and details for on-air acknowledgement. WeDidIt will remain a separate offering, although Allegiance intends to let customers add it as an option.

Allegiance provides a web-accessible donor portal where people can view information and access tax receipts, and integrates with PBS Passport to give members easy access to a PBS Passport Token. The system supports third-party systems, such as Satori, Constant Contact, or Mailchimp, as well as Forest Incentives for member benefits. A WordPress plug-in helps members and staff access donation forms from the WordPress platform.

The system is built on SQL with earlier generation Microsoft technologies. As a result, it's limited to vendor-built integrations until the company releases a future version of the software that provides API access. However, Allegiance has moved the system to the more contemporary Microsoft Azure infrastructure, and users can connect to the system from a Remote Desktop Protocol (RDP) client.

Allegiance also offers services that may be used separately from the software, although it intends the services to serve as a way for organizations to maximize value from the system. These services include a loyalty and incentive program, short-term or long-term staff augmentation, database cleanup, and on-site or remote training. More than 100 stations use Allegiance's loyalty and incentive program services, which manage member cards and benefits such as discounts (e.g., two-for-one dining, golf, or lodging).

More than 40 public media stations tap into the company's direct response fundraising services, which include both traditional direct mail and digital solutions. Offerings include new donor acquisition/add-gift/lapsed campaigns, ongoing monthly digital programs aimed at lead generation and donor conversion, and a printed newsletter, as well as sustainer and stewardship programs. Pricing for these custom solutions varies based on the needs of each client.

About 15 percent of Allegiance Fundraising Group clients use all three offerings—the software platform, loyalty and incentive program, and fundraising services—to some degree.

Allegiance tries to contain the migration process so that organizations are "up and live" on the system in around four months. It does this, in part, by assigning an install coordinator to the conversion process and a lead developer and trainer to work with each client to understand the organization's practices.

Allegiance provides a detailed software pricing menu on a public page at https://www.allegiancefundraising.com/software-pricing/. The core system offers options that range from $1,188 to $2,988 per user, per year.

The costs of optional add-ons and services—including address automation, matching gift management, auction services, and more—are posted on the site. The fundraising service is generally billed on an hourly fee.

Constituent Tracking

Relationship Tracking: Lets you track and connect a nearly unlimited amount of constituent relationships with the station, organization, or individuals. It's not possible to store constituents' past relationships with media sources in the constituent profile.

Relationship Strength: Relationships are defined by codes and link to either individuals or organizations. There's no built-in way to represent the strength of relationships.

External Data Import: Social media handles can be tracked on the donor record.

Special Requests/Preferences: Lets you enter and view information about donors' preferences by assigning it an activity code and type or by entering a free-form "special interest" note. You can display a summary of the note in the donor profile, or access the full note by expanding the view.

Communication Preferences: Lets you segment to generate and distribute communications based on constituent interests, profile information, and previous activity.

Opt-in/Opt-out: Lets you mark that a particular person should not be contacted through mail codes, but staff must check a particular field to display it. Syncing can be done from Constant Contact or Mailchimp for unsubscribed emails.

Historical Membership and Pledge Data: Lets you store all historical membership and pledge data in the constituent profile. Membership and financial data is segmented from other profile data (such as a volunteering, events, or capital campaigns) according to codes. You may access all historical pledge data on the "Account" tab under the Pledges screen.

Multiple Addresses (Email and Direct Mail): Lets you note multiple addresses on an account and specify which address should be used for certain types of mailings. You also can record dates for seasonal addresses.

Visual Reminders: For a visual reminder regarding specific constituent information, you could configure an activity to display a flashing reminder upon navigating to a constituent record. Additionally, there are account alerts for major donors, sustainers, and accounts with Donor Portal access.

Education Profile Data: There's no default way to track education profile information, but you could record this through Special Interest fields or activities.

Attachments to Records: Attachments can be added to constituent records and activities.

Communication Log: There's no dedicated communications log, but you may capture that information through activities.

Email History: Lets you track and store system-generated email history for any individual address through an integration with Constant Contact and Mailchimp.

Constituent Dashboard: Constituent interactions/activity across the organization are divided into different functional areas: Events, Volunteers, Memberships, etc.

Previous Contact: It's not possible to automatically recognize individuals who have had previous contact with the organization.

Volunteer Activities: Lets you log volunteer activities and preferences for supporters, including date, duration, and tasks, as well as a no-dollar equivalent for their time.

Education Profile Data: There's no dedicated means of tracking constituent use of education resources, tools, services, courses/conferences, or purchase history, but you may capture that information through activities.

Engagement Score: Lets you enter an "engagement score" for each constituent. Donor Ratings automatically calculates a score based on user-defined parameters and is stored in a special interest field.

Membership Management

Multiple Memberships in a Household: It's not possible to assign multiple memberships to one household. A database record describes an entire household, but is sorted under the individual selected as the "Head of Household." That individual's name appears as the primary contact.

Member Portal: Lets donors manage their own contact information, preferences, and credit card information.

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

Nonrenewal Tracking: Lets you note reasons for non-renewal (donors) or resignations (other activities, such as board or volunteering) by checking a box relating to a specific code. It's not possible to add business rules for future interactions based on reasons (e.g., moved out of state, retired, too expensive, no interest).

Unsubscribing: If using Constant Contact or Mailchimp, donor has the ability to unsubscribe directly from an email.

Annual to Sustainer: Lets you convert membership type from annual (single gift) to sustainer (recurring monthly) and vice versa through a drop-down menu.

Flexible Membership Dates: Lets you specify a membership start date based on transaction date or membership program default date or other specified date (e.g., the first or last of the month), and lets you adjust renewal terms to begin at the time that the previous term ends (as opposed to on the date of the transaction).

Gifts for Members: It's possible to enter additional gifts without extending the date term of the membership if you enter the gift under a separate code.

Membership Tiers: Lets you create tiered membership programs based on gift levels.

Membership Suppression: It's not possible to enter a start and end date for a suppression and append suppression notes (e.g., out of the country for six months, etc.). You would need to suspend the membership and give a reason code.

Alert Notes for Pledge Processing: Lets you add an alert note to an account that will appear during pledge processing (e.g., "never merge this account") as a flashing alert.

Recurring Gifts: Lets you associate membership levels with recurring gift plans, but you must manually provide appropriate benefits for a sustainer when their recurring gift amount changes.

Network Memberships: It's not possible for affiliated stations within your network to offer unique memberships with varying benefits and business rules.

Pre-Population of Member Information: It's not possible to have the system recognize and pre-populate previous donor information (e.g., addresses, phone numbers, etc.) on the web interface for donors. Volunteers answering phones and submitting pledges have the ability to search the database for an existing record.

Fundraising and Campaigns

Auction Tracking: The vendor has an external auction tracking system for an additional fee.

Major Giving Capability: A separate major giving module available for a fee lets you capture major donors' past giving, prospect management, cultivation, and stewardship activities, as well as segment major giving prospects by gift capacity, occupation, propensity to give scores, etc.

Campaign Codes: Lets you create a hierarchy of channel and origin codes to specify the source of member revenue (e.g., pledge drive, online, direct mail), as well as individual campaign details.

Integrated Campaigns: Campaign codes allow for tracking across multiple sources (e.g., email, web, mail, etc.).

Grants Management: There's no built-in functionality to track grants to the station.

Gift Strings: Lets you automatically generate ask strings for donations based on a formula.

Prospect Management: An additional option for a fee lets you report, score, and rank assigned prospects by stage, capacity, relationship manager, and/or length of time in a stage of the prospect life cycle through action plans.

Ticklers and Auto-Reminders: Lets you create "ticklers" for future communications based on constituent interests/actions and cultivation status, and auto-reminders to send important communications at predetermined points in the transaction process. Ticklers are shown as activities and may be assigned to other people. Reminders are displayed in a task list at the appropriate time.

Engagement Plans: Lets you assign, accept, store, and flag tasks associated with prospect identification, qualification, cultivation, solicitation, and stewardship activities. This functionality requires the major donor module.

Online Donation Form Customization: Lets you customize online donation/contribution forms, multiple customizable web forms for contributions.

Prospect Research Reports: Lets you store, retrieve, and generate reports for prospect research, such as prospect profiles and strategy memos, through an integration with WealthEngine.

Segmentation: Lets you segment constituent profiles based on membership information, status, interests, etc. by querying the database and assigning the segments codes.

Memorial and Tribute Memberships: Supports tracking of memorial, gift, and tribute memberships.

Soft Credits: Lets you track and generate "soft credits" through a checkbox on the gift record.

Donor Recognition: Lets you track on-air and online recognition for a donor or underwriter through an external web tool during pledge drives, but this information is not automatically recorded on constituent records.

Cross-Selling: It's possible to identify and report on prospect programmatic interests for potential cross-sell with custom reporting and fields.

Matching Gifts: Lets you track matching gifts that need to be claimed from an employer through a feature that may automatically create a pledge against the employer when you enter the gift to be matched through an integration with external vendor systems (Double the Donation or HEP). This is a module that costs extra.

Adjusting First Payment: Lets you manually adjust the first payment date on a pledge.

Pledge Drives and On-Air Fundraising

Pledge Drive Breaks: Lets you create daily and hourly on-air fundraising tracking systems (breaks) through a web-based pledge drive module.

Pledge Drive Data Tracking: Lets you track programs, dollar, and gift count goals, but not who the pitcher was in the break-tracking system.

Break Coding: Gifts tracked in the break-tracking system are automatically assigned a gift code.

Pledge Drives: It's possible to generate reports automatically from the system based on on-air fundraising breaks and hourly reports of total dollars pledged across all platforms for nationally produced pledge programming.

Multi-Year Tracking Reports: It's possible to generate multi-year tracking reports.

Communications Management

Renewal Notices: Lets you issue renewal notices via email or direct mail. Email is through an integration with Constant Contact.

Audio Files: Lets you include hyperlinks to communications, but not attachments or audio files.

Personalized URLs: It's not possible to integrate with email in order to create personalized URLs.

Personalized Renewal Emails: It's not possible to automatically personalize communication for member's name, address, membership level, expiration date, and suggested renewal amount regardless of delivery method in Allegiance, but you may do this through an integration with Constant Contact or Mailchimp.

Email Templates: It's not possible to create emails from start to finish using pre-defined (rule-based) templates in Allegiance, but you can do this with a Constant Contact or Mailchimp integration. You're limited to 14 different custom fields to bring over from Allegiance to Constant Contact.

HTML Communications: Lets you send graphical emails if you create the appropriate HTML code outside the system, but not create or save templates.

Multi-Language Communications: It's not possible to create and track multilingual communications.

Format Preview: It's not possible to preview email as it would appear on different platforms in Allegiance, but you may do this with a Constant Contact or Mailchimp integration.

Automatic Communications Prioritization: It's not possible to automatically prioritize across departments the importance of communications and distribute appropriately.

Data Integration: Lets you automatically process data from external sources (e.g., National Change of Address) with Satori Software integration, which is an additional charge.

Direct Mail: Lets you generate lists to export for mail houses.

Bouncebacks: It's not possible to track and follow up on email bouncebacks in Allegiance, but you can do this in Constant Contact or Mailchimp.

Constituent Preferences: It's not possible to segment communications based on constituent channel preferences (e.g., phone, mail, email, etc.) and type (e.g., direct mail, email, etc.) with automatic removal of constituents with suppressions in Allegiance, but you can do this with a Constant Contact or Mailchimp integration. It's possible to add activity codes to note communication preference.

Event Management

Event Promotion: Lets you track everyone who has registered for a particular event on their constituent records. However, there's no substantial capability to track responses by individual invitee.

Event Attendance Tracking: There's no dedicated functionality to track who attended an event, although this can be stored with an Activity Code or Special Interest Code.

Potential Event Attendees: Lets you identify potential event invitees based on selected variables through the regular process of segmentation.

E-Store/Inventory (Member Gift/Premium Management)

Inventory Management: Lets you track premium inventory in real time and automatically remove sold-out items from the website.

E-Commerce Data: The web module allows for a shopping cart style web page.

Dynamic Premium Options: Lets you provide dynamic options for premiums based on preferences if associated with the correct premium codes.

Premium Shipping: Lets you hold premiums from shipment until first payment is received, or until the entire or some portion of the amount is paid. Shipping is handled through an integration with Forest Incentive.

Transactions and Payments

Payment Management: Lets you flag expiring credit cards and prompt people to provide updated information in the member portal.

Manual Gift Entry: To add a gift to the system, find the donor, fill out fields, and associate the gift with a source code. Gifts are summarized in the constituent record across different functions: membership, capital campaigns, etc.

Adding Gifts to Pledges: Lets you automatically process standard pledges. When using the interface to add new gifts, you may display existing pledges and apply gifts against them, but you are not specifically asked to do so.

Check and Credit Card Processing: Lets you process local checks, EFT (electronic funds transfer) transactions, payment processing exceptions, and choose how to process credit card transactions (immediately or delay processing) with payment processor integrations with Paya, CyberSource, Bluefin, and Element.

Manual Invoice Adjustment: It's not possible to manually adjust invoices before merging, finalizing, and approving for distribution within the system.

Online Payment Processing: The vendor integrates with Paya Payment Solutions, Element Payment Services, Bluefin, PayPal and CyberSource.

Billing: Lets you bill automatically and distribute bills via email through an integration with Constant Contact or Mailchimp.

Pledge Processing: Lets you handle nonstandard pledges manually. It's not possible to automatically remove unfulfilled pledges over "X" days old with automated reports.

Single Contact Update: Lets you accept payment and import member transaction and contact updates across multiple channels.

Linking Interests to Donations: The system lets you add freeform notes to a gift to associate affinity interests to donations and link to the responsible (paying) account. These notes cannot be searched or queried.

Transaction Processing/Rules: It's not possible to automatically be notified when large gifts arrive in order to prompt further communication, but you could build a custom workflow to do so.

Gift Processing Notifications: Lets you create automatic notifications based on gift processing activity on the Premium tab.

PCI Compliance: Allegiance maintains Level 1 PCI compliance.

Customer Service

Customer Service Module: Constituents may submit comments through a webform on the Donor Portal. Those comments are then stored on the constituent record.

Internal Communications: There is no means of pushing out internal communication regarding content that may cause a large volume of calls, complaints, or interactions.

Case Assignment: Case assignment is possible for calls and emails for tracking customer service interactions.

Underwriting

Underwriting Activity Tracking: Allegiance provides a separate database for underwriting sales: the Allegiance Traffic & Corporate Support System.

Underwriting Sales Cycles: Allegiance provides a separate database for underwriting sales: the Allegiance Traffic & Corporate Support System.

Proposal Template Library: Allegiance provides a separate database for underwriting sales: the Allegiance Traffic & Corporate Support System.

Work Plans: Allegiance provides a separate database for underwriting sales: the Allegiance Traffic & Corporate Support System.

Forecasting: Allegiance provides a separate database for underwriting sales: the Allegiance Traffic & Corporate Support System.

Underwriting Reminders: Allegiance provides a separate database for underwriting sales: the Allegiance Traffic & Corporate Support System.

Prospect Lead Models: Allegiance provides a separate database for underwriting sales: the Allegiance Traffic & Corporate Support System.

Digital Engagement Tracking

Web Analytic Data: It's not possible to integrate web analytic content data and identify public-radio-friendly prospects (e.g., based on web use).

Social Media Mentions: It's not possible to track social media mentions on a constituent record (e.g., when an account mentions the station on Twitter or Facebook).

Website Commenting Data: It's not possible to track website-commenting data in member records.

Reporting and Querying

Queries: Lets you create queries by defining a series of criteria and filters. You also may write your own SQL queries.

Standard Reporting: Lets you generate prepackaged reports including top donors for a particular time frame, donors by level or stage, donors from Last Year But Unfortunately Not This one (LYBUNT) or donors from Some Year But Unfortunately Not This one (SYBUNT). Reports are output in Excel or PDF formats.

Real-Time Reporting: Lets you generate reports in real time (or near real time) during pledge drives.

Dashboards: Lets you create dashboards for different people. "Today's Business" provides a summary of the tasks assigned to a particular person on the home screen.

Tax Receipts: Lets you automatically generate tax receipts and provide them electronically to constituents.

Aging Data: Lets you track aging data for constituents, prospects, or leads with Management Reports.

Dynamic Lists: Lets you pull lists of constituents based on occupation, education, age, giving history, including attributes.

Ad-Campaign Performance: The system does not track ad-campaign performance (e.g., number of clicks, opens, etc.), but this can be added with a Constant Contact or Mailchimp integration.

Planned Giving Prospects: Lets you identify planned giving prospects based on specific criteria (e.g., consecutive years giving, age range, capacity, etc.) with WealthEngine integration.

DOI Score: There is not a designated field to create a DOI (Declaration Of Intent) score for planned giving prospects based on user-defined variables. A custom field can be created through Special Interest to track this data.

Data Sharing: It's not possible to share test/analytics data across the entire organization.

Campaign Pyramids: It's not possible to create and report on campaign pyramids.

Revenue Summaries: A standard report lets you summarize revenues by type and by affiliation.

Statistical Package Integration: It's not possible to integrate with SPSS and pull very large amounts of data without decreasing performance.

Maps, Tables, and Charts: The system lets you add maps, charts, and graphs to reports, but your options are limited.

Data Cleanup

Date Stamping: Lets you date-stamp transactions only through the pledge drive module.

Duplicates and Bad Entries: The system helps prevent duplicate entries when new people are entered by prompting you with a list of existing accounts that match parameters you configure during setup.

Multi-Person Access: Lets multiple people access constituent profiles simultaneously. Each account is journaled so that you may display the history of edits to a record.

System Integration

Importing Data: Lets you import external data from .csv or .txt files into multiple, discrete data fields.

Custom Table Import: It's not possible to import custom tables.

Phone System Integration: It's not possible to connect the database to a phone system to identify callers.

Interface for Premiums: SQL queries let you interface with other areas (e.g., warehouse, tax substantiation forms, etc.) when premiums are ordered by donors.

Loyalty Programs: Loyalty program involvement can be tracked through a Member Benefit field.

List Source Uploading: There is some ability to acquire and import data from various list sources in order to collect contact information for potential underwriting sales, but Allegiance recommends using a separate underwriting system.

Web Use Analytics: The system does not have the ability to integrate web usage via cookies from third-party software.

Integration with Financial Systems: The system has no default accounting integration. This is done at the time of implementation by the vendor for each organization.

Technical and Permissions

Individual and Group Permissions: Lets you define individual granular access to a group of key system fields.

Access to Constituent Data: Allegiance offers both an installed and hosted system. For the installed system, in order to access the system remotely, you will need to set up access through Citrix or another solution. For the hosted solution, stations would access a remote version of Allegiance through a RDP connection, which would be accessible anywhere with an internet connection and the right browser. In the hosted version of the software, people may access constituent data and records over the internet as a hosted, cloud-based solution.

Disaster Recovery: If using the installed product, stations are responsible for disaster recovery and redundancy, with advice from the vendor. The hosted version of the product has regular and frequent backups that are stored off-site, as well as fail-safes in place so if a server were to fail, another server would be available to support the product.

Maintenance Agreements: The vendor reports that for existing integrations, the agreement is made through the annual agreement with Allegiance. If it is a custom integration specifically for that organization, the station would be charged an annual fee for maintenance.

Security and Access: Database security is maintained through Microsoft SQL Server security tools for the installed version.

Source Code and APIs: Allegiance offers an API that validates if a donor is an active member with a station. The vendor reports that they are developing other solutions.

Setup and Configuration: Allegiance runs on PCs. The vendor offers both an installed and hosted system. For the installed version, you will need to install the system to your desktops, maintain your own infrastructure, and install your own upgrade. For the hosted solution, stations would access a remote version of Allegiance through an internet browser, and would not need to download and install Allegiance updates.

Prospecting Workflows: Lets you assign both a priority and a stage to a donor to manage prospecting workflows. There's no ability to define and track a custom workflow, however.

Mobile Devices: Lets station staff access and enter some data via mobile platforms for donation tracking and major gifts.

Usability

Ease of Use Overview: The system has a lot of different options and features, but since the vendor will configure it on setup to better match your workflow, the learning curve is decreased a bit. The organization of the system relies on many different screens, each with lots of screens and buttons. There's a lot of information on each page.

IT Skills: If needed, customers may access a Support Engineer team to help troubleshoot issues and solve how-to questions.

Support and Documentation

Help: The vendor offers guides for all systems and modules, as well as tipsheets and online video tech tips. The vendor has an on-site Support Engineer team to help troubleshoot issues and solve how-to questions. Additionally, a Client Portal is available for ticket entry/tracking and access to the Knowledge Base.

Training: The vendor offers online, on-site, and on-demand training.

THE RAISER'S EDGE NXT ▶▶▶

https://www.blackbaud.com/products/blackbaud-raisers-edge-nxt / @blackbaud

Since the early 1980s, Blackbaud has a history of providing widely used software solutions for organizations in the nonprofit sector. Public media stations use various generations of the organization's products, such as Raiser's Edge Enterprise, or the more current offering, Blackbaud Raiser's Edge NXT (While some stations still use Target Software's Team Approach,Blackbaud acquired the company in 2007 and no longer supports it, though it worked with many customers to transition data to other solutions.)

Blackbaud Raiser's Edge NXT provides browser-based access to many membership, fundraising, event, and volunteer data management tools, reports, and workflows. This browser-based "web view" works in conjunction with a "database view" application, which provides access to a more full-featured set of functionality. (The system is offered as a cloud-based system, although the back-end database relies on SQL Server.) People access the system's long-time core component, donor management, with a tile-based interface that adapts to a variety of devices.

The system also works closely with several apps to serve public media station needs. Luminate Online (acquired as part of Blackbaud's purchase of Convio in 2012) handles "digital engagement," such as email campaigns, sustainer processing, and member self-service information updates. Attentive.ly (purchased in 2016) serves to aid social listening and engagement. And Blackbaud Raiser's Edge NXT relies on integrations with ACD (for pledge drive support, online forms, and real time reporting), Forest Direct (for member benefit fulfillment), and PBS Passport to deliver essential features for public media stations.

While the system's data structures were not developed specifically for public media stations, the company has developed a configuration of campaigns (e.g., calendar year on air drive), funds (e.g., specific drive), appeals (e.g., program), and packages (e.g., specific break or segment). This setup makes it easier to track progress.

The system is designed to work well with the company's other offerings, including Blackbaud Financial Edge NXT, an enterprise financial system, and ResearchPoint, a prospect research tool which connects to WealthPoint for wealth screening and analysis.

Blackbaud also offers a variety of training and support services, including assistance with data migration and system conversion. A migration to Raiser's Edge NXT from an earlier version of Raiser's Edge typically takes up to four weeks—but implementation and migration from another system generally takes eight to 12 weeks. (Actual time depends on the complexity of your current data and setup.)

Blackbaud cultivates an active user community, both online and in-person. Each year it hosts the bbcon Conference to bring customers together, and also offers a variety of other events and webinars. Product training and support is available in-person and online.

Blackbaud offers Raiser's Edge NXT on a subscription basis that includes unlimited users, with pricing based on the number of records in your database. In some cases, implementation, data conversation, and training costs for everything that you need to get started fundraising may be bundled into your subscription. In other cases, these may be priced separately. (A one-time activation fee for

Raiser's Edge NXT customers is not included in the subscription; however, as of October 2019, the activation fee is waived for customers migrating from Raiser's Edge 7 to Raiser's Edge NXT.) Customers also may add the marketing capabilities of Luminate Online for additional costs.

Blackbaud declined to make pricing information available to us. You'll need to contact the company to discuss specific pricing details.

Constituent Tracking

Relationship Tracking: Lets you track, connect, and customize an unlimited number of constituent relationships with the station, as well as details about each relationship, and use custom fields to store constituents' past relationships with media sources in the constituent profile. You may flexibly create bi-directional relationships.

Relationship Strength: Lets you list relationships between constituents/organizations/etc. and provide hyperlinks to view the profiles of connected individuals, but there's not any mapping feature. It's not possible to automatically calculate the strength of the relationships based on interactions logged in the system.

External Data Import: Lets you collect and track constituent data from external information sources, including social media sources (e.g., Twitter, Facebook, etc.)

Special Requests/Preferences: Lets you document constituent special requests and preferences in the constituent profile.

Communication Preferences: Lets you automatically generate and distribute communications based on constituent interests, profile information, and previous activity.

Opt-In/Opt-Out: Lets you maintain opt-in/opt-out information on constituent profiles in order to deliver important/emergency communications. Constituents may manage their own opt-in and -out requests in the member portal. The system also has additional capabilities to comply with GDPR and other privacy regulations.

Historical Membership and Pledge Data: Lets you access all gifts, memberships, and pledge payments for a constituent on a single screen with collapsible tiles for each area.

Multiple Addresses (Email and Direct Mail): Lets you note multiple mailing addresses for an account (e.g., billing vs. shipping, seasonal, etc.), including dates. Lets you store multiple email addresses, phone numbers, social media accounts, etc. for one constituent.

Visual Reminders: Lets you configure pop-ups to represent specific constituent information, such as "board member" or "lifetime donor." These notifications display at the top of the screen.

Education Profile Data: Lets you track and segment education profile data through attributes or through an add-on alumni model.

Attachments to Records: Lets you attach documents to the donor record with either a URL or by drag-and-drop of a file into a tile.

Communication Log: Lets you store all historical membership and pledge data in the constituent profile in one click or less from the main donor page. Membership data and other gifts are distinguished. You may drill down from that page to display the number of dollar amount of gifts made for the year, or total giving. You may configure this screen to choose the lists and aggregate stats that are most useful to you.

Email History: Lets you track and store system-generated email history for any individual address, including statistics and tracking for broadcast emails set using Luminate Online.

Constituent Dashboard: Lets you display all recent communications and donor actions on one screen. You may customize this screen to include the fields that are most important to you.

Previous Contact: Lets you automatically recognize individuals who have had previous contact with the organization through an integration with Luminate Online.

Volunteer Activities: Lets you track an individual's interests and skills through customizable attributes to match people with potential volunteer opportunities. On the Volunteer tab, you may find jobs or find volunteers that have the characteristics that you're looking for, when they're available, and what they're qualified for. Constituents may express interest for specific jobs and enter biographical details themselves online, but a staffer would still need to perform data entry on the back end. Some volunteer information, such as availability and skills, are not available to enter online.

Education Profile Data: Constituent use of education resources, tools, services, courses/ conferences, including purchase history, can be tracked within Event records.

Engagement Score: Lets you automatically provide an "engagement score" for each constituent and provide incentives based on high-engagement levels.

Membership Management

Multiple Memberships in a Household: Lets you assign more than one membership (or combine memberships) within a household by assigning memberships at the individual, rather than the household, level.

Member Portal: Lets constituents manage and update their own information and preferences in real time, through a member portal.

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

Nonrenewal Tracking: It's possible to note reasons for non-renewal (donors) or resignations (other activities, such as board or volunteering) and create business rules for future interactions based on reasons (e.g., moved out of state, retired, too expensive, no interest) by creating preferences.

Unsubscribing: Lets you create an unsubscribe process that automatically syncs with all communication channels through a single sign-on Member Center.

Annual to Sustainer: Lets you convert membership type from an annual (single gift) to sustainer (recurring monthly).

Flexible Membership Dates: Lets you specify a membership start date based on transaction date or membership program default date or other specified date (e.g., the first or last of the month), and lets you adjust renewal terms to begin at the time that the previous term ends (as opposed to on the date of the transaction).

Gifts for Members: Lets you enter additional gifts without extending the date term of the membership.

Membership Tiers: Lets you create tiered membership programs based on gift levels.

Membership Suppression: It's possible to enter a start and end date for a suppression and append suppression notes (e.g., out of the country for six months, etc.) through attributes.

Alert Notes for Pledge Processing: Lets you add an alert note to an account that will appear during pledge processing (e.g., "never merge this account").

Recurring Gifts: Lets you associate membership levels with recurring gift plans, and automatically provide appropriate benefits for a sustainer when their recurring gift amount changes. Luminate Online handles some of this, while a connection to ACD also provides some functionality.

Network Memberships: Lets affiliated stations within your network offer unique membership with varying benefits and business rules.

Pre-Population of Member Information: System recognizes and prepopulates previous donor information (e.g., addresses, phone numbers, etc.) on certain front-facing forms with Luminate Online.

Fundraising and Campaigns

Auction Tracking: Blackbaud partners with multiple third-party auction providers, such as Bidr and AuctionMaestro Pro, that integrate with The Raiser's Edge NXT.

Major Giving Capability: Lets you capture major donors' back giving, prospect management, cultivation, and stewardship activities through the Prospects module.

Campaign Codes: Lets you create a hierarchy of channel and origin codes to specify the source of member revenue (e.g., pledge drive, online, direct mail), as well as individual campaign details. These may have a start and end date, as well as a goal.

Integrated Campaigns: Lets you create integrated campaigns across multiple channels (e.g., email, web, mail, etc.). You may log campaign expenses and run a return on investment report.

Grants Management: Lets you track program management for grants to the station and manage prospecting.

Gift Strings: Lets you automatically generate ask strings for donations through merge fields.

Prospect Management: Lets you report, score, and rank assigned prospects by stage, capacity, relationship manager, and/or length of time in a stage of the prospect life cycle through an integration with WealthPoint.

Ticklers and Auto-Reminders: Lets you create "ticklers" for future communications based on constituent interests/actions and cultivation status, and auto-reminders to send important communications at a predetermined point in the transaction process. Lets you create a reminder for yourself or other people for a particular constituent, task, and date, and display the reminder prominently at that time with a built-in calendar tool.

Engagement Plans: Lets you assign, accept, store, and flag tasks associated with prospect identification, qualification, cultivation, solicitation, and stewardship activities. A WealthPoint integration adds functionality.

Online Donation Form Customization: Lets you customize online donation/contribution forms and multiple customizable web forms for contributions. The system comes with some basic templates, but you have lots of flexibility. Web forms may be customized and branded by the station with a WYSIWYG editor.

Prospect Research Reports: Lets you store, retrieve, and generate reports for prospect research, such as prospect profiles and strategy memos, through the Prospects module and an integration with Target Analytics.

Segmentation: Lets you segment constituent profiles based on membership information, status, interests, etc.

Memorial and Tribute Memberships: Lets you enter tribute, memorial, and gift memberships with both the donor and the person honored.

Soft Credits: Lets you track and generate "soft credits" on both the payer and associated accounts.

Donor Recognition: It's not possible to track on-air recognition for a donor or underwriter by default, although online recognition is supported. On-air recognition could be tracked using attributes on a constituent record.

Cross-Selling: Lets you identify and report on prospect programmatic interests with attributes.

Matching Gifts: Lets you track matching gifts that need to be claimed from an employer through a matching record on each new gift entry. This tracks the matching amount and whether or not the match has been paid.

Adjusting First Payment: Lets you adjust the first payment date on a pledge (e.g., for grants, capital campaign gifts, etc.).

Pledge Drives and On-Air Fundraising

Pledge Drive Breaks: There's no built-in break-tracking system, but if you implement a campaign, fund, and appeal, you may track pitcher, program, dollar, and gift count goals, along with other pertinent data with custom workflows and reports.

Pledge Drive Data Tracking: There's no built-in way to track pitcher, program, dollar, and gift count goals within a break-tracking system.

Break Coding: There's no built-in break-tracking system, although the system can connect to ACD for this data.

Pledge Drives: It's possible to generate custom reports from the system based on on-air fundraising breaks and hourly reports of total dollars pledged across all platforms for nationally produced pledge programming.

Multi-Year Tracking Reports: It's possible to generate custom, multi-year tracking reports.

Communications Management

Renewal Notices: Lets you issue renewal notices via email or direct mail, either directly within the application or by building a query and exporting it.

Audio Files: Lets you link to files outside the database and add to communications.

Personalized URLs: Through an integration with Luminate Online, you may generate personalized URLs to embed in emails, as well as perform A/B testing.

Personalized Renewal Emails: Lets you create letter templates with complete control over layout, formats, logos, and images.

Email Templates: It's possible to create and save graphical HTML email templates to use in emailing groups with Luminate Online.

HTML Communications: It's possible to create and save graphical HTML email templates to use in emailing groups with Luminate Online.

Multi-Language Communications: It's possible to create and track multilingual communications with Luminate Online.

Format Preview: It's possible to preview email as it would appear on different platforms with Luminate Online.

Automatic Communications Prioritization: Lets you automatically prioritize across departments the importance of communications and distribute appropriately with integration with external communication tools.

Data Integration: Lets you automatically process data from external sources (e.g., National Change of Address, email change of address, phone append, etc.).

Direct Mail: Lets you generate lists for mail houses through reports and export to other tools for distribution.

Bouncebacks: Lets you access the open rate, click-through rate, and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports to allow you to follow up on undelivered email. These statistics appear on the constituent record.

Constituent Preferences: Lets you segment communications based on constituent channel preference (e.g., phone, mail, email, etc.) and type (direct mail, email, etc.) with dynamic removal of constituents (suppressions) with Luminate Online.

Event Management

Event Promotion: Lets you promote events to selected invitees through a variety of methods (email, social media, mail, phone, etc.), track responses by individual, and report actual attendance (by individual and in aggregate) by associating these responses with a campaign. An integrated online tool promotes events with Luminate Online.

Event Attendance Tracking: Lets you track everyone who has registered for a particular event and whether they attended—including ticketing information—in the campaign history on a constituent record.

Potential Event Attendees: Lets you identify potential event invitees based on selected variables through sophisticated segments.

E-Store/Inventory (Member Gift/Premium Management)

Inventory Management: It's possible to track premium inventory in real time and automatically remove sold-out items from the website with ACD and/or Forest Direct integration.

E-Commerce Data: It's possible to track and report on e-commerce data (e.g., purchases, what interests people even if no purchase, clicks, most page views, etc.) with ACD and Forest Direct.

Dynamic Premium Options: Lets you provide dynamic options for premiums based on preferences with ACD and Forest Direct.

Premium Shipping: Lets you hold premiums from shipment until first payment is received if the premium is stored as a product in the system.

Transactions and Payments

Payment Management: Payment history may be viewed in the system. Lets you automatically flag expiring credit cards and prompt people to provide updated payment information with Blackbaud Merchant Services. Blackbaud Merchant Services also includes a credit card updater service.

Manual Gift Entry: To add a gift to the system, you must first assign it to a campaign.

Adding Gifts to Pledges: Lets you automatically process standard pledges and includes algorithms for matching records.

Check and Credit Card Processing: Lets you handle EFT (electronic funds transfer) transactions and charge donors' credit cards within the system if configured with an external payment processor, such as Sage.

Manual Invoice Adjustment: Lets you manually adjust invoices before merging, finalizing and approving for distribution.

Online Payment Processing: Lets you process a broad range of payment options (see https://www.blackbaud.com/info/bbms/bbms-tier-3-interconnect-fees). The system also supports Apple Pay, MasterPass and Visa Checkout digital wallet services.

Billing: Lets you bill automatically and distribute bills via email.

Pledge Processing: Lets you handle nonstandard pledges manually, and you may remove unfulfilled pledges over "X" days old with automated reports.

Single Contact Update: Payment and import member transaction and contact updates may be made online or by station staff.

Linking Interests to Donations: Lets you associate affinity interests, such as a particular program, to donations, and link to the responsible account, and send customized communications to these segments.

Transaction Processing/Rules: Lets you create auto-notifications for large gifts in order to prompt further communication.

Gift Processing Notifications: Lets you create automatic notifications based on gift processing activity (e.g., processing, shipping, etc.).

PCI Compliance: Lets you maintain PCI compliance according to station policy with Blackbaud Merchant Services.

Customer Service

Customer Service Module: There's no dedicated functionality to track customer service inquiries, but you may track interactions with all callers, email, or web questions, with actions.

Internal Communications: Lets you push out internal communications regarding content that may cause a large volume of calls, complaints, or interactions with functionality that allows you to send a blast to staff.

Case Assignment: Lets a manager assign cases for calls and emails for tracking customer service interactions.

Underwriting

Underwriting Activity Tracking: Lets you track "productivity" type activities (e.g., individual sales rep data, calls made, etc.) and provide corresponding reports, but underwriting activities would be tracked as a kind of gift opportunity.

Underwriting Sales Cycles: Lets you track and manage multiple sales cycles and customize the reporting rules in those cycles with the Prospects module.

Proposal Template Library: There is no functionality to maintain a proposal template library along with core and common proposal language.

Work Plans: It's possible to customize work plans based on due dates and provide appropriate alerts for corresponding activities.

Forecasting: It's possible to track pending proposals and provide forecasting data based on historical analysis of sales rep data with the Prospects module.

Underwriting Reminders: Lets you track and provide reminders to people about expiring relationships (e.g., underwriting orders, memberships, etc.).

Prospect Lead Models: Lets you create different prospect qualifications/lead models for different sales reports by using Action Tracks and Workflows.

Digital Engagement Tracking

Web Analytic Data: Lets you integrate web analytic content data and identify public radio-friendly prospects (e.g., based on web use) with Luminate Online.

Social Media Mentions: Social Media engagement may be tracked with Attentive.ly.

Website Commenting Data: The system doesn't associate website comments with constituent records by default, although the system can connect to systems (such as Wordpress or Disqus) and also supports survey response tracking.

Reporting and Querying

Queries: Lets you query the constituent database for specific lists and information with a query-building tool.

Standard Reporting: Lets you generate reports on new members, upgrades, lapses, unfulfilled member pledges, etc. with standard reports that come in the system. You also can create ad hoc reports from the system's web view.

Real-Time Reporting: Supports ad hoc reports within the system, which may include and filter by nearly any field displayed. These reports may include custom data columns, data sets, sorting, grouping, logos, and headers.

Dashboards: Lets you create dashboards customized for different people, as well as create new dashboards.

Tax Receipts: Lets you automatically generate tax receipts and provide electronically to constituents with Luminate Online.

Aging Data: Lets you track aging data for constituents, prospects, or leads.

Dynamic Lists: Lets you query using criteria from any database field, including custom fields.

Ad Campaign Performance: Lets you track ad-campaign performance (e.g., number of clicks, number of opens, etc.) as well as A/B testing.

Planned Giving Prospects: Lets you identify planned giving prospects based on specific criteria (e.g., consecutive years giving, age range, capacity, etc.) in the Prospects module.

DOI Score: Lets you calculate a DOI (declaration of intent) score based for planned giving prospects based on user-defined variables with the Prospects module.

Data Sharing: All reports/queries/lists and pages may be shared to users that have security access. Reports may be generated and password-protected for non-users.

Campaign Pyramids: Lets you create and report on campaign pyramids.

Revenue Summaries: Revenues by type and by affiliated stations for each calendar month may be created with standard dashboards.

Statistical Package Integration: Lets you integrate with SPSS and other statistical packages.

Maps, Tables, and Charts: The system lets you add a wide variety of charts and graphs to reports, and can display list results on a Bing map.

Data Cleanup

Date Stamping: Lets you date stamp all constituent information and historical data.

Duplicates and Bad Entries: Lets you configure parameters around data duplication with an online duplicate checking and merging tool.

Multi-Person Access: Lets multiple people access constituent profiles at the same time.

System Integration

Importing Data: Lets you import external data from a variety of sources and fields through the API.

Custom Table Import: Lets you import custom tables.

Phone System Integration: Lets you connect the system to a phone system to identify callers.

Interface for Premiums: Lets you automatically connect to other systems when premiums are ordered by donors.

Loyalty Programs: There's no default ability to track loyalty program involvement, although this can be done with custom fields.

List Source Uploading: Lets you acquire and import data from various list sources to collect contact information for potential underwriting sales prospects and evaluate for accuracy.

Web Use Analytics: The system may integrate web usage with Luminate Online.

Integration with Financial Systems: The system supports integration with The Financial Edge, another Blackbaud product, by default.

Technical and Permissions

Individual and Group Permissions: Lets you define individual or group permissions on a field-by-field basis and by query through the Permissions Suite.

Access to Constituent Data: Constituent records may be accessed anywhere with internet access and a supported device.

Disaster Recovery: Disaster recovery is a standard part of Blackbaud's hosting services.

Maintenance Agreements: The vendor will manage maintenance agreements with other Blackbaud products.

Security and Access: Supports the ability to configure security roles for each person.

Source Code and APIs: It's possible to access system data with an API.

Setup and Configuration: Blackbaud offers The Raiser's Edge NXT as a hosted system. Blackbaud manages updates to the system.

Prospecting Workflows: The system supports custom workflows.

Mobile Devices: Lets station staff access and enter data via a web browser.

Usability

Ease of Use Overview: The web view offers a flexible, tile-based interface. Staff may require training before using this powerful system, which include several built-in help resources.

IT Skills: Blackbaud handles system maintenance and updates for The Raiser's Edge NXT, which is a cloud-based system.

Support and Documentation

Help: Lets you access a useful combination of help text throughout the application, online help, written manuals, and recorded training to help staff understand how to use the system.

Training: The vendor provides substantial options for email and phone support and web/live trainings are plentiful. Blackbaud offers tiered customer service options at different price points.

SALESFORCE ▶▶▶

https://www.salesforce.org / @SalesforceOrg

Founded in 1999, Salesforce is an enterprise software company that offers a customizable, cloud-based platform. The company has a significant presence in the nonprofit sector, with more than 43,000 organizations using the system. Compared to the other solutions in this report, Salesforce offers more flexibility and also requires more technical understanding of the system to manage.

Public media stations tend to deploy Salesforce in one of two ways: customized with a consultant, or self-configured. (A third option—roundCause, a pre-configured solution built on the Salesforce platform for public media stations—was taken off the market after Salesforce acquired roundCorner, the vendor behind it, in January 2019.)

Most organizations that choose Salesforce will likely work with a consultant to create a solution specifically to serve their organizations' needs. A consultant can bring a deep knowledge of how Salesforce works, along with project management and implementation expertise. When you select a consultant, make sure to verify that the team involved has specific familiarity with nonprofit organizations and data needs. A significant number of Salesforce consultants have deep nonprofit and donor engagement expertise. That expertise can save a significant amount of time during a Salesforce implementation project.

A few stations might prefer to build a self-customized solution. Typically, this often means using Salesforce's Nonprofit Success Pack (NPSP), a configuration of Salesforce intended to serve nonprofit organizations. The NPSP makes it easier to get started with Salesforce, since it adds a variety of configuration choices and reports needed by many nonprofit organizations. However, your staff will likely need significant Salesforce expertise to fully build out a solution to meet public media station needs.

In either case, you have a user group of one: Your organization is the only one with the system customized exactly to meet your needs. The decisions that your team makes—especially about data structure—have the potential to make some tasks either easy or difficult to complete. While most decisions may be changeable, expertise and experience are needed for implementation success.

Salesforce works with a significant ecosystem of applications listed in the Salesforce AppExchange. Integrating with another application can be as simple as selecting the third-party application from the Salesforce store and then allowing the app to work with your data. As a general rule, the more complex the integration, the more configuration may be needed.

If your organization is of sufficient size to have at least one person (or more) dedicated to database-related tasks, then Salesforce makes a great deal of sense for your organization. Salesforce, and even Salesforce with the Nonprofit Success Pack deployed, offers a powerful platform that public media stations will want to customize before use.

Salesforce offers up to 10 free subscriptions to eligible nonprofit organizations. Stations also may purchase additional subscriptions as needed. For example, Salesforce offers Lightning Enterprise Edition and the Nonprofit Success Pack for $36 per user per month ($432 per user per year), or for additional features, the Lightning Unlimited Edition with the Nonprofit Success Pack for $72 per user per month ($864 per user per year).

It's worth noting that, while the platform itself is available for free, customization and implementation can have significant costs. Because the system is highly customizable, the configuration and migration time will vary depending on the people and platforms involved. (Note: The feature descriptions below refer to Salesforce's NPSP.)

Constituent Tracking

Relationship Tracking: Lets you track, connect, and customize an unlimited number of constituent relationships with the station, as well as details about each relationship, and use custom fields to store constituents' past relationships with media sources in the constituent profile.

Relationship Strength: Lets you list relationships between constituents/organizations/households and link to profiles of connected individuals, and Relationship Builder allows you to visualize relationships as needed. It's not possible to automatically calculate the strength of the relationships based on interactions logged in the system.

External Data Import: Built-in tools allow for batch data import from flat files as needed (with data mapping features built-in), along an API tool that allows data integration without data import.

Special Requests/Preferences: Lets you document constituent special requests and preferences in the constituent profile. This is accomplished by adding in configured fields that can be managed via a pick list.

Communication Preferences: Nonprofit Success Pack (NPSP) allows users to identify custom communications by adding additional fields via configuration.

Opt-In/Opt-Out: Lets you maintain opt-in/opt-out information on constituent profiles in order to deliver important/emergency communications. Communications would be delivered through Salesforce marketing automation tools (Pardot or Marketing Cloud). Salesforce fully supports GDPR standards and protocols for opt-in/opt-out.

Historical Membership and Pledge Data: Lets you store all historical membership and pledge data in the constituent profile in one click or less from the main donor page. Membership data and other gifts are distinguished. You may drill down from that page to access the number of dollar amount of gifts made for the year, or total giving. You may configure this screen to choose the lists and aggregate stats that are most useful to you.

Multiple Addresses (Email and Direct Mail): Lets you track seasonal addresses for an account, including start and end dates. Lets you store multiple email addresses, phone numbers, social media names, etc., for one constituent.

Visual Reminders: Lets you define "levels" to identify and tag unique and self-created constituent levels like "board member" or "major donor."

Education Profile Data: Lets you track and segment educational data through custom fields.

Attachments to Records: Lets you attach communications/documents (e.g., thank you letter, proposal with cover letter, underwriting contract, etc.) to any object in the system, including constituent files. You also may attach documents to the Chatter feed, the internal communications channel.

Communication Log: Lets you manually collect and store information on additional touch points (e.g., email, phone, event attendance, etc.) through Activities.

Email History: Lets you track and store system-generated email history for constituents.

Constituent Dashboard: Lets you display all recent communications and donor actions on one screen. You may customize this screen to include the fields that are most important to you. The system also comes with over 60 out-of-the-box reports and five dashboards (across all nonprofit use cases), which are customizable.

Previous Contact: Lets you automatically recognize individuals who have had previous contact with the organization through duplicate checking tools.

Volunteer Activities: Lets you track volunteer activity within events at the individual or organization level.

Education Profile Data: Education information can be tracked using standard configuration. Many NPSP customers will track education data in configured objects that are connected to the contact record. This allows for roll-up reporting at the contact and education institution level.

Engagement Score: Lets you automatically provide an "engagement score" for each constituent and provide incentives based on high-engagement levels through an integration with WealthEngine.

Membership Management

Multiple Memberships in a Household: Lets you assign more than one membership (or combine memberships) within a household by assigning memberships at the Contact level, rather than the Account (household) level.

Member Portal: Lets donors manage their own contact information, preferences, and credit card information through Salesforce Communities, an optional add-on.

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

Nonrenewal Tracking: It's possible to note reasons for non-renewal (donors) or resignations (other activities, such as board or volunteering) and create business rules for future interactions based on reasons (e.g., moved out of state, retired, too expensive, no interest) by creating preferences.

Unsubscribing: It's possible to create an unsubscribe process that automatically syncs with all communication channels using the Communities feature.

Annual to Sustainer: The system automatically calculates and assigns memberships by evaluating all members' gifts. When a member switches from annual to sustainer, the membership is automatically renewed, rejoined, or upgraded, depending on the value of the new gift.

Flexible Membership Dates: Lets you specify a membership start date based on transaction date or membership program default date or other specified date (e.g., the first or last of the month), and lets you adjust renewal terms to begin at the time that the previous term ends (as opposed to on the date of the transaction).

Gifts for Members: Since membership is automatically calculated based on gifts, you must manually ensure that additional gifts will not extend the date term of the membership.

Membership Tiers: Lets you create tiered membership programs based on gift levels.

Membership Suppression: Lets you enter a start and end date for a suppression and append suppression notes (e.g., out of the country for six months, etc.).

Alert Notes for Pledge Processing: Lets you add an alert note to an account that will appear during pledge processing (e.g., "never merge this account").

Recurring Gifts: Lets you associate membership levels with recurring gift plans, and automatically provide appropriate benefits for a sustainer when their recurring gift amount changes.

Network Memberships: It's possible to let affiliated stations within your network offer unique memberships with varying benefits and business rules through custom workflows.

Pre-Population of Member Information: System recognizes and prepopulates previous donor information (e.g., addresses, phone numbers, etc.) on certain front-facing forms when signed in through Salesforce Communities.

Fundraising and Campaigns

Auction Tracking: It's not possible to manage live or online fundraising auctions, although you may track auction purchases as gift types. Third-party programs available via the Salesforce AppExchange could manage this process.

Major Giving Capability: Lets you capture major donors' past giving, prospect management, cultivation, and stewardship activities, as well as segment major giving prospects by gift capacity, occupation, propensity to give scores, etc.

Campaign Codes: Lets you create a hierarchy of channel and origin codes to specify the source of member revenue (e.g., pledge drive, online, direct mail), as well as individual campaign details.

Integrated Campaigns: Lets you create integrated campaigns across multiple channels (e.g., email, web, mail, etc.).

Grants Management: It's possible to track the application process for grants to the station. A grant is considered a type of gift.

Gift Strings: Lets you automatically generate ask strings for donations based on a formula.

Prospect Management: Lets you report, score, and rank assigned prospects by stage, capacity, relationship manager, and/or length of time in a stage of the prospect life cycle through an integration with WealthEngine.

Ticklers and Auto-Reminders: Lets you create "ticklers" for future communications based on constituent interests/actions and cultivation status, and auto-reminders to send important communications at a predetermined point in the transaction process. Lets you create a reminder for yourself or other people for a particular constituent, task, and date, and display the reminder prominently at that time with a built-in calendar tool.

Engagement Plans: Lets you assign, accept, store, and flag tasks associated with prospect identification, qualification, cultivation, solicitation, and stewardship activities through an integration with WealthEngine.

Online Donation Form Customization: Donation forms may be handled with third party apps available on the AppExchange.

Prospect Research Reports: Lets you store, retrieve, and generate reports for prospect research, such as prospect profiles and strategy memos, through an integration with WealthEngine or iWave.

Segmentation: Lets you query for a set of constituents who meet criteria for a standard set of fields. It's possible to create a flexible query for a set of constituents based on almost any field in the database.

Memorial and Tribute Memberships: Lets you enter tribute, memorial, and gift memberships with both the donor and the person honored.

Soft Credits: Lets you track and generate "soft credits" on both the payer and associated accounts.

Donor Recognition: It's not possible to track on-air and online recognition for a donor or underwriter by default, although it is possible to do so with activities on a constituent record.

Cross-Selling: It's possible to identify and report on prospect programmatic interests for potential cross-sell with activities on a constituent record.

Matching Gifts: Lets you track matching gifts that need to be claimed from an employer through a matching record on each new gift entry. This tracks the matching amount and whether or not the match has been paid.

Adjusting First Payment: Lets you adjust the first payment date on a pledge (e.g., for grants, capital campaign gifts, etc.).

Pledge Drives and On-Air Fundraising

Pledge Drive Breaks: Campaigns have start and end dates natively in the system.

Pledge Drive Data Tracking: There's no built-in way to track pitcher, program, dollar, and gift count goals within a break-tracking system. This can be addressed via a customization or third party application.

Break Coding: Campaigns have start and end dates natively in the system.

Pledge Drives: It's possible to generate custom reports from the system based on on-air fundraising breaks and hourly reports of total dollars pledged across all platforms for nationally produced pledge programming.

Multi-Year Tracking Reports: It's possible to generate custom, multi-year tracking reports.

Communications Management

Renewal Notices: Through integrations with other tools, you can issue renewal notices via email or direct mail. Direct mail merges would be performed with an app, such as Conga Merge, and Salesforce marketing automation products, Pardot or Marketing Cloud, would send emails.

Audio Files: It's possible to include attachments, links, and audio files to communications through Salesforce marketing automation products (Pardot or Marketing Cloud).

Personalized URLs: Through Salesforce marketing automation products (Pardot or Marketing Cloud) you may generate personalized URLs to embed in emails, as well as perform A/B testing.

Personalized Renewal Emails: It's possible to send personalized renewal emails to your constituents through Salesforce marketing automation products (Pardot or Marketing Cloud).

Email Templates: You may create emails from start to finish using Salesforce marketing automation products (Pardot or Marketing Cloud).

HTML Communications: It's possible to create and save graphical HTML email templates to use in emailing groups with Salesforce marketing automation products (Pardot or Marketing Cloud).

Multi-Language Communications: NPSP supports multi-language configurations.

Format Preview: It's possible to preview email as it would appear on different platforms with Salesforce marketing automation products, Pardot or Marketing Cloud.

Automatic Communications Prioritization: Lets you automatically prioritize across departments the importance of communications and distribute appropriately with custom workflows and integrations with communications tools.

Data Integration: NPSP takes advantage of native API connections into Salesforce.

Direct Mail: Lets you generate lists for mail houses through reports and export to other tools for distribution.

Bouncebacks: Bounceback information is integrated into the system via Marketing Cloud.

Constituent Preferences: It's possible to segment communications based on constituent channel preferences (e.g., phone, mail, email, etc.) and type (e.g., direct mail, email, etc.) with automatic removal of constituents (suppressions) with NPSP and Marketing Cloud.

Event Management

Event Promotion: It's possible to identify potential event invitees based on selected variables through segments.

Event Attendance Tracking: Lets you track everyone who has registered for a particular event and whether they attended — including ticketing information — in the campaign history on a constituent record.

Potential Event Attendees: It's possible to generate custom reports on event attendance information.

E-Store/Inventory (Member Gift/Premium Management)

Inventory Management: Lets you track inventory in real-time if customized for the use case. Supports integration with third-party systems for inventory management.

E-Commerce Data: It's possible to track and report on e-commerce data with Salesforce Commerce Cloud. Third-party tools can be integrated into NPSP as needed via API connections.

Dynamic Premium Options: Dynamic premium options would be surfaced via a customization.

Premium Shipping: Lets you hold premiums from shipment until first payment is received.

Transactions and Payments

Payment Management: It's not possible to automatically flag expiring credit cards and prompt people to provide updated information.

Manual Gift Entry: To add a gift to the system, you can enter data manually with Batch Gift Entry. You also can navigate to a donor profile, then fill out fields.

Adding Gifts to Pledges: System automatically recognizes that a pledge exists and includes the ability to apply a gift toward that pledge.

Check and Credit Card Processing: Lets you handle EFT (electronic funds transfer) transactions and charge donors' credit cards within the system if configured with an external payment processor.

Manual Invoice Adjustment: Lets you manually adjust invoices before merging, finalizing and approving for distribution.

Online Payment Processing: Lets you process a broad range of payment options if configured with an external payment processor.

Billing: Billing can be accomplished via reporting or via documentation creation tools like Conga.

Pledge Processing: Lets you handle nonstandard pledges manually. It's possible to remove unfulfilled pledges over "X" days old with custom workflows.

Single Contact Update: Lets you accept payment and import member transaction and contact updates across multiple channels.

Linking Interests to Donations: This functionality would vary with the processing partner selected.

Transaction Processing/Rules: Lets you create auto-notifications for large gifts in order to prompt further communication.

Gift Processing Notifications: Lets you create automatic notifications based on gift processing activity (e.g., processing, shipping, etc.).

PCI Compliance: Lets you maintain PCI compliance according to station policy with an external payment processor.

Customer Service

Customer Service Module: Lets you track interactions with people who call, email, or post via the web with Salesforce Cases functionality.

Internal Communications: Lets you push out internal communications through Salesforce Chatter.

Case Assignment: Lets a manager assign cases for calls and emails for tracking customer service interactions.

Underwriting

Underwriting Activity Tracking: Lets you track "productivity" type activities (e.g., individual sales rep data, calls made, etc.) and provide corresponding reports, but underwriting activities would be tracked as a kind of gift opportunity.

Underwriting Sales Cycles: Lets you track and manage multiple sales cycles and customize the reporting rules in those cycles with the Opportunity module.

Proposal Template Library: Lets you maintain a proposal template library along with core and common proposal language.

Work Plans: It's possible to manage the underwriting sales process using actions.

Forecasting: It's possible to track pending proposals and provide forecasting data based on historical analysis of sales rep data.

Underwriting Reminders: Lets you create a reminder within the system for yourself or for someone else to do a task on a particular date. Lets you add an expiration date to a relationship.

Prospect Lead Models: It is possible to create different prospect qualifications/lead models for different sales reps.

Digital Engagement Tracking

Web Analytic Data: Lets you integrate web analytic content data and identify public-media-friendly prospects (e.g., based on web use) if the system is integrated with an external CMS at the time of implementation.

Social Media Mentions: You can track social media mentions with Salesforce Marketing Cloud Social Studio (a social media management product).

Website Commenting Data: Lets you track website commenting data to member records if the system is integrated with an external CMS at the time of implementation.

Reporting and Querying

Queries: Lets you query the constituent database for specific lists and information through ad hoc reporting.

Standard Reporting: Lets you generate reports on new members, upgrades, lapses, unfulfilled member pledges, etc. with standard reports in the system.

Real-Time Reporting: Supports ad hoc reports within the system, which may include and filter by nearly any field displayed. These reports may include custom data columns, data sets, sorting, grouping, logos, and headers.

Dashboards: Custom dashboards can be created based on any data elements in the system.

Tax Receipts: Lets you automatically generate tax receipts and provide them electronically to constituents with third-party applications on the AppExchange.

Aging Data: There's no built-in aging report for constituents, prospects, or leads, although such reports could be configured.

Dynamic Lists: Lets you query using criteria from any database field, including custom fields.

Ad Campaign Performance: Lets you track ad-campaign performance (e.g., number of clicks, opens, etc.) with e-solicitations in the Campaign object.

Planned Giving Prospects: Lets you identify planned giving prospects based on specific criteria (e.g., consecutive years giving, age range, capacity, etc.) with a query.

DOI Score: There's no default functionality to calculate a DOI (declaration of intent) score for planned giving prospects based on user-defined variables, but one could be configured.

Data Sharing: Lets you share test/analytics data across the entire organization with Salesforce Chatter.

Campaign Pyramids: Lets you run specific campaign reports and configure dashboards for campaign metrics and analysis reporting metrics. These can be visualized as a campaign pyramid.

Revenue Summaries: Lets you summarize revenue by type and affiliated stations for each calendar month.

Statistical Package Integration: Lets you integrate with SPSS and other statistical packages.

Maps, Tables, and Charts: The system lets you add a wide variety of charts and graphs to reports. It's possible to create maps with Google Maps.

Data Cleanup

Date Stamping: It's not possible to automatically date stamp all constituent information and historical data. It's possible to show field tracking history for up to 20 fields in each object. (Additional fields may be added at additional cost.)

Duplicates and Bad Entries: Lets you identify data duplication during external list upload with Batch Data Import. The AppExchange offers various third-party tools to find and merge duplicate reports.

Multi-Person Access: Lets multiple people access constituent profiles at the same time.

System Integration

Importing Data: Lets you import external data from a variety of sources and fields into multiple discrete data fields.

Custom Table Import: Lets you import custom tables and use the data in dynamic, user-defined ways (e.g., target tags, data appends) with the Data Loader tool.

Phone System Integration: Lets you connect the system to a phone system to identify callers.

Interface for Premiums: Integrations, such as Forest and Marketing Cloud, let you automatically interface with other areas (e.g., warehouse, tax substantiation forms, etc.) when premiums are ordered by donors.

Loyalty Programs: There's no default ability to track loyalty program involvement.

List Source Uploading: Lets you acquire and import data from various list sources to collect contact information for potential underwriting sales prospects or evaluate for accuracy.

Web Use Analytics: The system may integrate web usage via cookies from third-party software if configured with a CMS.

Integration with Financial Systems: Lets you integrate constituent data with financial systems, either by using existing integrations in the AppExchange, or with custom-built connections.

Technical and Permissions

Individual and Group Permissions: Lets you enter data via remote access and in real time.

Access to Constituent Data: Lets you access constituent data and records over the internet and mobile devices as a cloud-based system.

Disaster Recovery: NPSP leverages the Salesforce platform for system and storage redundancy. Each implementation spans multiple tenant environments.

Maintenance Agreements: Stations are responsible for maintenance agreements with any third-party apps they might choose to install or use with NPSP.

Security and Access: The system relies on Salesforce's platform security. User access can be defined based on permission settings.

Source Code and APIs: NPSP source code is available via Github.

Setup and Configuration: Knowledge and familiarity with Salesforce enables people to configure and use the Nonprofit Success Pack. An implementation partner also may be used.

Prospecting Workflows: The system supports custom workflows.

Mobile Devices: The system supports data and voice entry, as well as access from mobile devices via the Salesforce app.

Usability

Ease of Use Overview: The system requires set-up and training, not only for end users but also for people who will serve as Salesforce administrators

IT Skills: Users will be able to use the system with training but more complex processes and flows may require more technical knowledge. Users may choose to become a certified Salesforce Administrator.

Support and Documentation

Help: There is an online community for support. A paid premier support plan provides faster support.

Training: Training is delivered as part of the implementation and via documentation and FAQs. Trailhead, a comprehensive online training system, covers most aspects of Salesforce, ranging from basic use, to reporting, to development.

TESSITURA ▶▶▶

https://www.tessituranetwork.com / @tessnetwork

As a nonprofit organization, Tessitura's business model sets it apart from the other systems featured in this report. Created by nonprofit cultural organizations to meet the information needs of nonprofit cultural organizations in 2001, Tessitura has grown to serve more than 650 organizations around the world. It has developed deep expertise in customer relationship management, ticketing, subscription management, event, and donor management. Tessitura can be customized and extended to meet the needs of a large, triple-license station, such as managing more than 10 pledge drives each year. In fact, a public media station in one of the largest media markets in the United States moved to Tessitura in 2019 because the core functionality was a strong fit for their needs.

Tessitura is an all-in-one system: When you license it, you get the entire system. It does rely on third parties for some functionality, such as mass email services. The system includes an API (application programming interface) with integrations to ecosystem partners, such as WealthEngine, iWave, DonorSearch, Worldpay, and Vantiv. The company has a nightly data exchange with PBS Membership Vault (MVault) and is exploring additional integration options.

Tessitura offers both single-instance setups or sub-license configurations. The latter is a configuration where one organization acquires licenses, then allocates separate Tessitura setups for different sub-licensee organizations. Such a configuration might make sense for an organization with several distinct operations, or for a set of stations with similar setups.

Tessitura is built on SQL Server and runs on Windows. The company is evolving the system to allow more functionality to be accessed with a web browser. At the moment, though, macOS computers, for example, will need to access Tessitura with some sort of remote access solution.

A public media station may choose either to install and self-manage Tessitura or have Tessitura host the software. When installed and self-managed, your organization will be responsible for updates, patches, server maintenance, and backups. When Tessitura hosts the server for your organization, they are responsible for uptime and backup.

Typically, Tessitura issues one major upgrade annually, with smaller service packs intended to be installed non-disruptively released throughout the year. For example, the company emphasized improvements to business analytics capabilities in response to user organization requests.

The company suggests that a typical migration to Tessitura might take six months for small operations. A larger station might make the move in phases, with the first phase completed in a few months, followed by additional phases over the course of a year. Tessitura recommends that a station identify an individual to serve as the primary point of contact during the transition. Ideally this person will be someone who can help ensure station staff meet internal deadlines and facilitate communication—both within the organization and between the organization and Tessitura.

Tessitura does not provide pricing information or guidance on the organization's website. Pricing is personalized based on organization size and typically includes a perpetual license, an annual maintenance and support fee, consulting hours for implementation, and data migration.

Tessitura does not charge additional licensing fees for upgrades and new versions. Contact the vendor for pricing and details.

Constituent Tracking

Relationship Tracking: Lets you track, connect, and customize an unlimited number of constituent relationships with the station, as well as details about each relationship, and use custom fields to store constituents' past relationships with media sources in the constituent profile. Individuals are grouped into households and organizations through relationships; household and non-household relationships are tracked separately. You may assign start and end dates to a relationship.

Relationship Strength: Lets you list relationships between constituents/organizations/etc. and provide hyperlinks to view the profiles of connected individuals, but there's not any mapping feature. The system includes standard reporting, and relationship scores could be customized based on individual station needs.

External Data Import: It's possible to collect and track constituent data from external information sources, such as social media (e.g., Twitter, Facebook) and includes standard constituent and contribution import utilities.

Special Requests/Preferences: Lets you document constituent special requests and preferences in the constituent profile, either through attributes (which may be free-form text, drop-downs, dates, or numbers) or interests, which may be pushed through to online forms as checkboxes and automatically coded to the constituent profile. Interests are also able to be imported and will be the optimal place to include PBS Vault viewing information, as values can be added to interests to quantify the details of the individual.

Communication Preferences: Lets you to automatically generate and distribute communications based on constituent interests, previous activity, and CRM data points. Tessitura is fully GDPR compliant. (The system allows you to collect contact permissions from customers and maintain a schedule to update those contact permissions, and includes the right to be forgotten and functionality surrounding protected individuals.)

Opt-In/Opt-Out: Lets you maintain opt-in/opt-out information on constituent profiles in order to deliver important/emergency communications. Lets you generate a list of members for whom there's no email address (e.g., to route by mail instead). Constituents may manage their own opt-in and opt-out requests in the member portal. Tessitura allows you to collect contact permissions from customers and maintain a schedule to update those contact permissions. The types of contact points are configurable by the station and this information can be collected during in-person, phone, or online transactions.

Historical Membership and Pledge Data: Lets you store all historical membership and committed pledges in the constituent profile (in the Contributions tab). All pledge details are viewable on the Contributions tab, including the ability to click through and view and adjust pledge schedules, payment/credit card information, and other details surrounding the pledge.

Multiple Addresses (Email and Direct Mail): Lets you note multiple mailing addresses for an account (e.g., billing vs. shipping, seasonal, etc.), including start and end dates, and tag these addresses with roles, such as "use this for premiums."

Visual Reminders: Letter codes on the constituent profile represent specific constituent information, such as "board member" or "lifetime donor," along with the ability to include images in the header for quick notification, such as "credit card decline" or "email bounce."

Education Profile Data: Lets you track and segment education profile data through configured attributes or screens.

Attachments to Records: Lets you attach communications/documents (e.g., thank-you letter, proposal with cover letter, underwriting contract, etc.) to the specific moves management communications or the CRM record itself.

Communication Log: Tessitura includes a standard communication log which is a summary of all entered communications on the CRM record. An automatic record of mass communications (emails, mail, etc.) can be bulk-added to individual records and individual touch points can be added into moves management plans (email, phone calls, etc.).

Email History: Tessitura lets you track and store system-generated email history for any individual address, including statistics and tracking for broadcast emails. Tessitura includes integration with WordFly (https://www.wordfly.com/) and Prospect2 (https://www.prospect2.com/). Both providers Both offer a flat pricing model based on the overall email list size, handle large volumes, include template creation tools, and integrate via an API. Results from email campaigns automatically import into Tessitura. Email details (sent, click-through, opt-out) are recorded within Tessitura and on custom screens provided by the email partners. Both integrated email solutions include scheduled and automated emails based on transactions and other activity within Tessitura, as well as the ability for Tessitura lists to deliver constituents to the deployment program automatically.

Constituent Dashboard: Lets you display all recent communications and donor actions on one screen. You may configure this screen to include the fields that are most important to you. Detailed headers can be configured and Tessitura includes standard constituent profile reports to view the entire CRM record.

Previous Contact: Lets you automatically recognize individuals who have had previous contact with the organization through duplicate checking.

Volunteer Activities: Lets you track an individual's interests and skills through configurable attributes to match people with potential volunteer opportunities. You can track volunteer shifts and individual busy/available times. Volunteers may manage their own busy and available times online, if access is configured per station.

Education Profile Data: You may track and segment education profile data through configured attributes or screens. Education registrations can be configured and processed in the system, along with the possibility of capturing additional data points as necessary.

Engagement Score: Lets you automatically provide an "engagement score" for each constituent through Tessitura Rankings. The system includes standard integrations to WealthEngine, iWave, and Donor Search.

Membership Management

Multiple Memberships in a Household: Any household or individual record can include an unlimited number of memberships, which may be added at the Individual or Household level and transactions can be processed at the Individual or Household level.

Member Portal: With an API, stations can create their desired member portal features or facilitate integrations with other systems. The system includes basic contribution forms and constituent management which allows members to update their own contact information and preferences in real time, though a single sign-on member portal, which may be branded to match your station's website.

Membership Tracking: Provides functionality to track an unlimited number of member levels, payment details, membership trends, creditees, membership changes, expiration dates, premiums and premium fulfillment.

Nonrenewal Tracking: It's possible to note reasons for non-renewal (donors) or resignations (other activities, such as board or volunteering) and create business rules for future interactions based on reasons (e.g., moved out of state, retired, too expensive, no interest) by adding membership notes or creating attributes. That information can be displayed in the constituent header, if desired.

Unsubscribing: Lets you create an unsubscribe process that automatically syncs with all communication channels. Members may sign into the portal and check off which communications they would prefer to receive. The system allows you to collect contact permissions from customers and maintain a schedule to update those contact permissions.

Annual to Sustainer: It's possible to convert membership type from annual (single gift) to sustainer (recurring monthly) by adjusting the initial contribution into a pledge with a specific tag (Sustainer or Auto-Renewal).

Flexible Membership Dates: Lets you specify a membership start date based on transaction date or membership program default date or other specified date (e.g., the first or last of the month), and lets you adjust renewal terms to begin at the time that the previous term ends (as opposed to on the date of the transaction).

Gifts for Members: Lets you enter additional gifts without extending the date term of the membership. By default, Tessitura uses your configured Membership Renewal/Upgrade rules, but can always be overridden if needed.

Membership Tiers: Lets you create tiered membership programs based on gift levels.

Membership Suppression: Lets you enter a start and end date for a suppression and append suppression notes (e.g., out of the country for six months, etc.) by altering the membership term dates or adding specific attributes to the member/CRM record.

Alert Notes for Pledge Processing: Lets you add an alert note to an account that will appear during pledge processing (e.g., "never merge this account").

Recurring Gifts: Includes functionality for recurring gifts, through auto renewal functionality. Adjustments can be made to the amounts and benefits can be adjusted if the gift amount changes. Benefits may be configured based on membership levels or giving amount.

Network Memberships: Lets affiliated stations within your network offer unique memberships with varying benefits and business rules, which can facilitate multiple unlimited membership rules, varying benefits, and business rules. The system can facilitate the protection of data across multiple stations and only display the membership details necessary for each station.

Pre-Population of Member Information: System recognizes and prepopulates previous donor information (e.g., addresses, phone numbers, etc.) on certain front-facing forms when signed in through the out-of-the box member portal or through custom development using an API.

Fundraising and Campaigns

Auction Tracking: The system supports third-party auction systems to facilitate online auctions. Standard import tools can display auctions purchases within the CRM record. For onsite auctions, purchases can be tracked in real-time using Elevated Event and Campaign functionality.

Major Giving Capability: Lets you capture major donors' past giving on the Contributions tab. Prospect management, cultivation, and stewardship activities are tracked through Plans and Portfolio functionality. Plans can track specific interactions (calls, letters, invitations, etc.), link staff/volunteer/board workers as those responsible for steps within the plan, and provide visibility to any contributions made as a result of the solicitation. You can track contacts made, link solicitors to proposals, follow deadlines and goals, connect document and proposal attachments, and more.

Campaign Codes: Fundraising campaigns are created on either a project or annual basis. These campaigns link to funds (purpose restrictions) and also may be linked to membership organizations and giving levels. Each campaign, fund, and designation can have a goal attached for reporting purposes, along with being able to run multiple campaigns at the same time.

Integrated Campaigns: Lets you create integrated campaigns across multiple channels (e.g., email, web, mail, etc.).

Grants Management: Lets you track program management for grants to the station and manage prospecting through the Plans and Portfolio functionality, with the ability to segment grants from other contribution types. Grants gifts are tracked on the contribution tab and can be segmented for reports and analysis.

Gift Strings: Lets you automatically generate ask strings for donations in emails and letters based on a formula, using an output set builder.

Prospect Management: Lets you report, score, and rank assigned prospects by stage, capacity, relationship manager, and/or length of time in a stage of the prospect life cycle.

Ticklers and Auto-Reminders: Lets you create reminders for future communications based on constituent interest/actions and cultivation status, and auto-reminders to send important communications at a predetermined point in the transaction process. Lets you create a reminder for yourself or other people for a particular constituent, task, and date, and display the reminder prominently at that time with a "reminders" feature on the sign-in screen.

Engagement Plans: Lets you assign, accept, store, and flag tasks associated with prospect identification, qualification, cultivation, solicitation, and stewardship activities. WealthEngine, Donor Search, and iWave integration increases functionality.

Online Donation Form Customization: With an API, stations can create their desired donation form experience. The system includes standard import and export tools to allow you to create the online experience that your station desires. The system includes basic contribution forms, which may be customized and branded by the station.

Prospect Research Reports: Includes a standard research tab to collect, store, and report on research information. Integrations with WealthEngine, Donor Search, and iWave facilitate donor propsect profile reports.

Segmentation: May use nearly any data field as criteria to build lists. This includes items such as client type, any defined 'Attribute', and any combination of transaction, membership, or contribution history. Advanced relationship options allow people to target individual or organizational records as appropriate all in real-time. Lists can be set as “dynamic,” which can enable them to stay refreshed and up-to-date without manual generation.

Memorial and Tribute Memberships: Lets you enter tribute, memorial, and gift memberships with both the donor and the person honored.

Soft Credits: Lets you track and generate "soft credits" on both the payer and associated accounts.

Donor Recognition: Includes configurable fields on the contribution record to facilitate on-air and online recognition for donors or underwriters.

Cross-Selling: Lets you identify and report on prospect programmatic interests with attributes.

Matching Gifts: Lets you track matching gifts that need to be claimed from an employer through a matching record on each new gift entry.

Adjusting First Payment: Lets you adjust the first payment date on a pledge (e.g., for grants, capital campaign gifts, etc.).

Pledge Drives and On-Air Fundraising

Pledge Drive Breaks: A custom screen tracks daily and hourly on-air fundraising breaks. Reporting on revenue based on those breaks is standard functionality using the system's source and appeal structure.

Pledge Drive Data Tracking: A custom screen tracks daily and hourly on-air fundraising breaks. Reporting on revenue based on those breaks is standard functionality using the system's source and appeal structure.

Break Coding: A custom screen tracks daily and hourly on-air fundraising breaks. Reporting on revenue based on those breaks is standard functionality using the system's source and appeal structure.

Pledge Drives: Support for pledge drives includes reporting (scheduled, ad-hoc and near-real time), premium management, pledge break tracking, integration across all channels (DM, telemarketing, email) and APIs to work with external vendors such as call centers. Within the system, appeals can be created to facilitate tracking surrounding drives. Within an appeal, customer contacts are segmented into source lists or sources are created based on individual drive efforts. Each source is assigned a unique number and all transactions are tied back to these numbers for reporting.

Multi-Year Tracking Reports: Includes built-in Reporting & Analytics tools, which can report over multiple years of contribution data. Custom reporting can be created by the stations, if needed.

Communications Management

Renewal Notices: Lets you issue renewal notices via email or direct mail. Broadcast email and marketing automation would be sent through tools integrated into Tessitura, such as WordFly or Prospect2.

Audio Files: Lets you include attachment and hyperlinks to communications with WordFly or Prospect2. The vendor recommends you link to audio files, rather than include files as attachments.

Personalized URLs: Lets you integrate with email in order to create personalized URLs through tools integrated into Tessitura, such as WordFly or Prospect2.

Personalized Renewal Emails: Lets you automatically personalize communications. Broadcast email and marketing automation would be sent through tools integrated into Tessitura, such as WordFly or Prospect2.

Email Templates: Lets you create emails using predefined (rule-based) templates with Wordfly or Prospect2.

HTML Communications: It's possible to create and save graphical HTML email templates to use in emailing groups with Wordfly or Prospect2.

Multi-Language Communications: It's possible to create and track multilingual communications with Wordfly or Prospect2.

Format Preview: It's possible to preview email as it would appear on different platforms with Wordfly or Propsect2.

Automatic Communications Prioritization: Lets you automatically prioritize across departments the importance of communications with campaign management.

Data Integration: Lets you automatically process data from external sources (e.g., National Change of Address, email change of address, phone append, etc.) using standard tools. The system includes tools for real-time address verification in the application or online.

Direct Mail: Lets you generate lists for mail houses through reports and export to other tools for distribution.

Bouncebacks: Tracks and displays the open, click-through, and unsubscribe rate for each email. Bounce reports allow you to follow-up on undelivered email. These statistics appear on the constituent record and are fed from Wordfly or Prospect2 via real-time API integration.

Constituent Preferences: Lets you segment communications based on constituent channel preference (e.g., phone, mail, email, etc.) and type (direct mail, email, etc.) with automatic removal of constituents (suppressions) with WordFly or Prospect2.

Event Management

Event Promotion: Lets you promote events to selected invitees through a variety of methods (e.g., email, social media, mail, phone, etc.), track responses by individual, and report actual attendance (by individual and in aggregate). Invitations can be sent out via email, using integrated partners (Wordfly or Prospect2) and RSVP's can be automatically updated in real-time.

Event Attendance Tracking: Lets you track everyone who has registered for a particular event and whether they attended within the database.

Potential Event Attendees: Lets you identify potential event invitees based on selected variables through sophisticated segments.

E-Store/Inventory (Member Gift/Premium Management)

Inventory Management: Includes tools for setup of premiums, including tracking quantities of each premium. Depending on fulfillment (in-house or via third-party).

E-Commerce Data: Depending on the station's web solution, Google Analytics can be embedded within the e-commerce page to track behavior.

Dynamic Premium Options: Includes configuration options for the automatic assignment of premiums based on appeal or dollar amount.

Premium Shipping: Lets you hold premiums from shipment until the first payment is received if the premium is stored as a product in the system. You also may put in a tax-deductible amount and track the shipment information if desired.

Transactions and Payments

Payment Management: Includes standard reports for tracking credit cards that are going to expire, and can add a notification to prompt people that accounts need to be updated.

Manual Gift Entry: Includes gift processing through Contribution Editor that enables you to associate contributions with a specific Campaign or Fund, along with other details, such as acknowledgement information, creditees (honor/memorial), payment details, recognition data, and more. Pledges are recorded and tracked like any other contribution, with information to indicate pledge amount outstanding, payment schedule, and payment methods tied to the transaction. Payment schedules can be viewed and adjusted from the Contribution Screen.

Adding Gifts to Pledges: Lets you automatically process standard pledges and includes algorithms for matching records.

Check and Credit Card Processing: The system securely files and tracks bank account information for EFT processing. Once payments are processed via your EFT provider, the system applies those payments to existing pledges, marking pledges completed or failed. Integrated payment processing with Windcave or Worldpay supports VISA, MasterCard, American Express, and Discover.

Manual Invoice Adjustment: Invoices for outstanding pledges are generated from the Pledge details. If a pledge is adjusted, the invoice will be adjusted. Tessitura also uses mail merge, so additional changes can be made through MS Word.

Online Payment Processing: Lets you process a broad range of payment options. Integrated payment processing with Windcave or Worldpay supports VISA, MasterCard, American Express, and Discover.

Billing: Lets you bill automatically and distribute bills via email, as well as direct mail.

Pledge Processing: Lets you handle nonstandard pledges manually, and batch adjust or write-off unfulfilled pledges over "X" days old with automated reports.

Single Contact Update: Lets you accept payment and import member transaction and contact updates across multiple channels.

Linking Interests to Donations: Lets you associate affinity interests, such as a particular program, to donations and link to the responsible account.

Transaction Processing/Rules: Lets you create auto-notifications for large gifts in order to prompt further communication.

Gift Processing Notifications: Lets you create automatic notifications based on gift processing activity (e.g., processing, shipping, etc.).

PCI Compliance: Tessitura's software and hosting facility have both been PCI compliant and PA-DSS certified since the requirements were originally released. The system includes a fully integrated payment gateway, and integrated PCI-Compliant and EMV-Certified Payment Processing through Windcave and Worldpay.

Customer Service

Customer Service Module: Lets you track customer service inquiries within the constituent record with dedicated case management functionality.

Internal Communications: There's no means of pushing out internal communications regarding content that may cause a large volume of calls, complaints, or interactions.

Case Assignment: Lets a manager assign cases for calls and emails for tracking customer service interactions.

Underwriting

Underwriting Activity Tracking: Includes tools to track all contacts, calls, etc. through Plans and Portfolios. Spot details, primary contacts, financial goals and more may be tracked using Tessitura's standard tools. Realized commitments are tracked in specific underwriting financial campaigns.

Underwriting Sales Cycles: Includes standard tools to track the full sales cycle of underwriting commitments.

Proposal Template Library: Include the ability to attach formats for creating proposals in PDF form or the ability to mail merge directly from the system into defined Word templates.

Work Plans: It's possible to customize work plans based on due dates and provide appropriate alerts for corresponding activities.

Forecasting: Includes tools for tracking pending proposals and budgeting/forecasting based on renewal rates and goals.

Underwriting Reminders: Lets you track and provide reminders to people about expiring relationships (e.g., underwriting orders, memberships, etc.) and add dates to relationships.

Prospect Lead Models: Plans and Portfolios include tools for creating different templates for individual sales reps and create the Plans in bulk for each individual rep.

Digital Engagement Tracking

Web Analytic Data: An API facilitates integrations with Google Analytics and Google Tag Manager for reporting on customer activity, cart abandonment, and other e-commerce activities.

Social Media Mentions: Supports promotion codes, links to special discounts online, discounting across all sales channels based on customer information, membership level or a combination of items being added to the shopping basket. Additional social media sharing can be added by embedding a third-party plugin (such as AddThis).

Website Commenting Data: Includes standard functionality and API calls surrounding customer feedback being passed back to the CRM record.

Reporting and Querying

Queries: Lets you query the constituent database for specific lists and information with a query-building tool.

Standard Reporting: Tessitura includes 200+ standard reports in all functional areas. Custom reports can be created with any third-party report writer that is compatible with Microsoft SQL, such as SQL Server Reporting Services (SSRS). Organizations may post the code for custom reports on a Tessitura website, from which other member organizations can download the report for free. Includes a business intelligence platform, Tessitura Analytics, which offers flexible dashboards with filtering, sorting and drill-down capabilities. You may modify the pre-built dashboards or to create dashboards from scratch for ad hoc analysis or to measure institution-specific KPIs.

Real-Time Reporting: Lets you generate reports in real time (or near real time) during pledge drives.

Dashboards: Tessitura Analytics allows you create as many individual Dashboards as necessary. Tessitura Analytics is embedded within the Tessitura application and includes access via a web browser.

Tax Receipts: Lets you automatically generate tax receipts and provide electronically to constituents.

Aging Data: Tessitura includes standard reports for tracking aging data.

Dynamic Lists: Lets you pull lists of constituents using criteria from any database field, including custom fields, through a query-building tool.

Ad Campaign Performance: Lets you track ad-campaign performance (e.g., number of clicks, number of opens, etc.).

Planned Giving Prospects: Lets you identify planned giving prospects based on specific criteria (consecutive years giving, age range, capacity, etc.) in the major donor module.

DOI Score: There's no default functionality to calculate a DOI (declaration of intent) score for planned giving prospects based on user-defined variables, but one could be configured.

Data Sharing: Lets you share test/analytics data across the entire organization with Tessitura's business intelligence data analysis tool, T-Stats.

Campaign Pyramids: There's no default capability to create and report on campaign pyramids, however loyalty and ranking scores can be created based on your individual station needs.

Revenue Summaries: Lets you summarize revenue by type and affiliated stations as standard functionality.

Statistical Package Integration: Tessitura provides a business intelligence platform, Tessitura Analytics, which is included at no additional cost and is fully integrated.

Maps, Tables, and Charts: Tessitura Analytics allows you to create an unlimited number of maps, tables, and charts.

Data Cleanup

Date Stamping: Lets you date stamp all constituent information and historical data with attributes. The system keeps a detailed audit trail of all financial transactions (ticket, event, membership sale, etc.), changes to customer records, and other key setup changes. Tracks the date and time of the change, the user who made the change, and the user location. In some cases, Tessitura also tracks the value of the field prior to and after the change.

Duplicates and Bad Entries: The system's built-in merge utility is scheduled to run on a regular basis to look for potential duplicate accounts. Duplicate matching criteria are typically based on name, street address, email and Zip code. Automated reports and notifications can be configured to help identify missing data.

Multi-Person Access: Lets multiple people access constituent profiles at the same time.

System Integration

Importing Data: Lets you import external data from a variety of sources and fields by mapping fields directly in an .xml sheet.

Custom Table Import: Lets you import custom tables and use the data in dynamic, user-defined ways (e.g., target tags, data appends).

Phone System Integration: Lets you connect the system to a phone system to identify callers with an API.

Interface for Premiums: The API lets you automatically interface with other areas (e.g., warehouse, tax substantiation forms, etc.) when premiums are ordered by donors.

Loyalty Programs: Tessitura includes tools to configure and track loyalty programs and engagement.

List Source Uploading: Lets you acquire and import data in batches from various list sources to collect contact information for potential underwriting sales prospect and evaluate for accuracy.

Web Use Analytics: Tessitura's API facilitates integrations with Google Analytics and Google Tag Manager for reporting on customer activity, cart abandonment, and other e-commerce activities.

Integration with Financial Systems: Tessitura serves as a sub-ledger to any financial system. Tessitura includes built-in financial management functionality, including the ability to configure General Ledger accounts and link them to payment methods, events, contribution funds and fees; automatic assignment of transactions to the appropriate GL codes; secure cash and transaction handling and auditing; automatic tracking of financial impact of transactions on a summary and detailed level; and the ability to act as a detailed sub-ledger to any finance/account system, including the ability to export a daily summary of transactions to create a journal entry in the required format. The API also can facilitate real-time integration into a station's desired financial system.

Technical and Permissions

Individual and Group Permissions: System administrators may configure and manage user permissions across the system. Access to Constituent Data: Lets you enter data via remote access and in real time. Lets you access constituent data and records over the internet (as a hosted, cloud-based system).

Disaster Recovery: A Disaster Recovery (DR) plan would be initiated in the event of a catastrophic failure. Tessitura's Recovery Point Objective (RPO) is 30 minutes, and Recovery Time Objective (RTO) is 4-6 hours for Tier I applications. It will take longer to bring up Tier II and Tier III systems. Maintenance Agreements: Vendor's hosting service provides server provisioning and hardware, software installation, ongoing database maintenance and system upgrades. Tessitura includes unlimited 24x7x365 professional support, as well as all new versions and upgrades. Security and Access: Tessitura maintains its own security framework, which contains all Tessitura users. You may optionally map a Tessitura user to an Active Directory user.

Source Code and APIs: Offers a REST API with the Tessitura license at no additional cost. There is no cost involved for the API, aside from any consulting fees for custom development work provided by Tessitura or others. There are two-way API calls to support customer information, transactions, setup, and other areas.

Setup and Configuration: The application may be hosted by Tessitura in a single-tenant model or hosted by the customer on the customer's premise. Tessitura hosting provides server provisioning and hardware, software installation, ongoing database maintenance and system upgrades, and 24x7x365 support. By late 2020 (or early 2021), the company plans to migrate to the Amazon Commercial Cloud environment, with Rackspace managing the service. The system architecture and overall functionality is the same regardless of the delivery model selected. Customers connect to the environment with multi-factor authentication via Citrix.

Prospecting Workflows: The system supports custom workflows.

Mobile Devices: Tessitura Web is browser-based and exposes some functionality via a browser, which is designed to work responsively on any device. The application is integrated with Tessitura in real time via the REST API. Functionality available includes Constituent Profile, Plans and Portfolios, Resource and Volunteer Management, Select Reports, and Tessitura Analytics.

Usability

Ease of Use Overview: Once you have mastered the system, it becomes quite quick to use. Terminology is easy to understand and the system provides a fair amount of functionality to optimize time-consuming tasks, such as data entry.

IT Skills: More complex processes, such as queries or data imports, may require a staff with technical proficiency.

Support and Documentation

Help: The vendor offers help options, including full online documentation, online training videos, and live and recorded webinars.

Training: Tessitura offers extensive free, ongoing learning and training opportunities in addition to the consulting, configuration, data conversion, and training assistance that take place during implementation. Members have access to learning resources on the web for self-learning, training, and knowledge-sharing. The company offers a wide range of optional consulting services available.

ALTERNATIVE SYSTEMS ▶▶▶

The following systems were reported as "in use" by various public media organizations in response to a Greater Public survey in late 2018. We omitted any system that lacked a working public website, since, in 2019, we take that as a signal a vendor no longer seeks customers. We've also included the Twitter account for each vendor. Our experience has been that modern vendors that are serious about support and serving customers also maintain an active Twitter account. (Idealware covered many of these additional systems in detail in **A Consumers Guide to Low-Cost Donor Management Systems**, available for free download at https://www.idealware.org/reports/consumers-guide-low-cost-donor-management-systems)

CRM / Donor Management Systems

Several systems intended to meet general membership or donor management needs are also in use by public media organizations. A few public media stations rely on university-provided (or mandated) systems. However, organizations that choose these systems may need to make tweaks or customizations, add third-party apps, or live without some features. That said, even though these systems aren't specifically designed to be used for public media purpose, they're either in use or being considered for use within the field. For each, we provide a website and Twitter handle.

Abila, by Community Brands

A variety of fundraising and donor management software solutions
abila.com / @abila_inc

Agilon's One Donor CRM

A donor, alumni, and membership management system
myagilon.com / @myagilon

Argos, Banner, among others (from Ellucian)

System primarily used in colleges and university systems
ellucian.com / @ellucianinc

Bloomerang

A donor database with an emphasis on engagement and retention
Bloomerang.co / @bloomerangTech

thedatabank

A customer relationship management database and an all-in-one integrated system for communicating with constituents
thedatabank.com / @thedatabank

DonorPerfect

Online fundraising and customer management system
donorperfect.com / @donorperfect

eTapestry
Cloud-based fundraising software for growing organizations
blackbaud.com/products/blackbaud-etapestry / @blackbaud

EveryAction
Unified digital, donor, and organizing CRM
Everyaction.com / @everyactionhq

FundRaiser Software
Offers fundraising systems for varying-size organizations, available online or installed
fundraisersoftware.com / @frsoftware

iMIS
Nonprofit, association and membership software
advsol.com/asi/ / @advsol

Memsys
Membership fundraising software for nonprofits, available online or installed
memsys.com / @memsys

NeonCRM
An online fundraising, membership, event, and website system
neoncrm.com/ / @neoncrm

ROI Solutions
Offers Revolution Online for constituent, donor, and event management
roisolutions.com/ / @datageekspeak

Other Systems

The following are all data management software systems that at least one public media station reports as in use. Use of any of these systems would require careful consideration and focused attention to development. (Note: A few other public media organizations use custom-built solutions, such as Enterprise, that are not publicly promoted, and are therefore not listed here.)

Filemaker (from Claris)
A relational database (originally closely associated with Apple) from Claris
filemaker.com / @clarisofficial

Microsoft Access
A relational database offered as part of Microsoft's Office suite
https://products.office.com/en-us/access / @office365

Microsoft Dynamics 365
An enterprise resource planning and customer relational database system
https://dynamics.microsoft.com/en-us/crm/what-is-crm/ / @msftdynamics365

Paradox database management systems (from Corel)
A relational database offered as part of WordPerfect Office Professional Edition
https://www.wordperfect.com/en/product/professional-edition/#features / @mywordperfect

ABOUT THIS REPORT ▶▶▶

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About Greater Public

Greater Public supports public media organizations and empowers them to reach new heights. For more than 35 years, Minnesota-based Greater Public has helped public media organizations across the country raise tens of millions of dollars, which has resulted in stronger local service and has enriched communities and lives. Through its strong relationships across the public media ecosystem, Greater Public serves leaders and practitioners at 250 member organizations across the country and is working to take on new, big challenges and provide the resources and support to spark innovation. For more information, visit GreaterPublic.org.

About Tech Impact

Tech Impact is a nonprofit on a mission to empower communities and nonprofits to use technology to better serve the world. The organization is a leading provider of technology education and solutions for nonprofits and operates award-winning IT and customer experience training programs designed to help young adults launch their careers. Tech Impact offers a comprehensive suite of technology services that includes managed IT support, data and strategy services, telecommunications, and cloud computing integration and support. In 2018, it expanded its education and outreach capabilities by merging with Idealware, an authoritative source for independent, thoroughly researched technology resources for the social sector. Tech Impact's ITWorks and CXWorks training programs have graduated hundreds of young adults with the knowledge, skills and confidence they need to start their careers in the technology and customer experience industries. The organization also operates Punchcode, a coding bootcamp based in Las Vegas, NV. Learn more at www.techimpact.org.