



# Update to A Guide to Synagogue Management: Research and Recommendations

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# **CONSIDERING SYNAGOGUE MANAGEMENT SYSTEMS**

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# INTRODUCTION

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## We interviewed a variety of synagogue staffers about what they needed a system to help them do, and compared what they said to how the systems handled common tasks.

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A few years ago, the synagogue management software sector experienced a seismic shift. Like many other nonprofits, synagogues of all sizes across the country had been using database software for several decades to keep track of their members, manage events like the high holidays, and handle billing and invoicing. Some synagogues also used their systems to handle fundraising and outreach to members via direct mail and eventually via email and online.

These systems, like all of the options available at the time, were installed, meaning that a synagogue needed a dedicated server to maintain it, and required a hefty up-front license cost. Customer support, a necessity for the many synagogues that rely on volunteers and nontechnical staff to run their membership programs, was often another expense. Some synagogue staff and their board members felt that the available software was costly, difficult to maintain, and hard to navigate. Some even questioned the value of using software to

track their community, even as such technological processes became standard in the for-profit community and declining enrollment signaled a problem with member engagement.

The advent of hosted, or cloud-based systems, and a CRM (constituent relationship management) strategy have spelled significant changes for the synagogue management sector. New vendors have entered the space. Other vendors who had been in the marketplace for many years in turn have adopted some of the innovations of the newer model in order to stay competitive, such as integrated email capabilities, shorter contracts, online payment and event management, and even self-service member portals for synagogue members to edit their contact information and preferences.

In the summer and fall of 2012, when Idealware was contracted by the UJA-Federation of NY and a consortium of several of the movements from the Jewish community (Orthodox Union, United Synagogue of Conservative Judaism, Union of Reform Judaism) to research and analyze the synagogue management system marketplace and provide recommendations for a path forward, this shift was just beginning to be felt by synagogues and their staffers. The result of our research, *A Guide to Synagogue Management: Research and Recommendations*, was published online in January of 2013. In that guide, we took a look at 22 different systems—not just from the synagogue management sector, but from the CRM, donor management, membership management, and church management sectors to see how they compared to the most widely used systems in synagogues. We interviewed a variety of synagogue staffers about what they needed a system to help them do, and compared what they said to how the systems handled common tasks. We also analyzed how customizable the systems were, and how willing the vendors were to work with either individual synagogues or a consortium of them to alter the system to better fit the needs of synagogues.

From that list of 22, Idealware identified 12 that seemed to fit the needs of synagogues particularly well after an initial demo. From those 12, three eventually bowed out, so we included detailed reviews of nine systems in the final report, including apples-to-apples comparisons of how they handled tasks particularly important to synagogues.

The world of technology changes quickly, however, and in the year and a half since that report was released, the software that we reviewed has changed. In this update, we hope to provide a current look at how the nine top systems have changed (or haven't). For this report, we asked the vendors to indicate what has changed in their systems based on the detailed, item-by-item reviews published in the last report. Because we anticipated moderate changes in the systems and we conducted full demos for the initial report, we didn't demo any of these systems; rather, we asked the vendors to comment on the original reviews, noting any changes to date. So, it's important to keep in mind that these changes are as they were reported by the vendors, and haven't been independently verified by Idealware.

We also wanted to know about any new, potentially game-changing options on the marketplace, so we conducted interviews with several experts in the synagogue management sector to ask them about what they'd heard. Two systems were mentioned as options to strongly consider, both of which were among the 22 that we profiled in the original report but were not part of the top nine. In the spring of 2014, Idealware reached out to the vendors of these two options, ShulCloud and Cloud for Synagogues, and arranged for two-to-three hour demos using the same script that we evaluated systems with back in late 2012. You'll find detailed reviews of those two systems alongside the updated reviews of the other nine.

A third system, Rakefet, has big changes coming that we heard about from several experts in the field, but the new platform won't be released until the fall of 2014. We took the marketing material that Rakefet sent us and applied Idealware's unbiased, candid interpretation to help analyze what this could mean for their current clients and anyone thinking about the platform as an option.

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## In the year and a half since that report was released, the software that we reviewed has changed.

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Over the course of our interviews, correspondence with the vendors, and product demos, five big themes emerged for the entire synagogue management software sector. We'll unpack them here.

### 1. CRM continues to be a formidable force.

The transition from, in vendors' marketing language, a "database" to a "CRM"—which stands for constituent relationship management—has been occurring throughout the nonprofit sector, and the synagogue sector is no exception. In our definition, a CRM is a flexible system that's meant to provide a high-level, 360-degree look at all of your different constituents. CRMs come out of the box without much specific infrastructure built in, and are seamlessly integrated with a synagogue's web and email presence so that a constituent's online interactions are captured within the system.

Some vendors in the synagogue management space have chosen to build turnkey solutions on top of preexisting, widely-used CRM platforms, adding in features important to synagogues like robust membership management and invoicing capabilities, high holiday management, and Yahrzeit tracking. In this model, we covered the ShulSuite solution, built on the CiviCRM platform, in the last guide. In this update, we're including a detailed look at the Cloud for Synagogues product, which uses the Salesforce platform for its underpinnings.

We're also including updates to the Salesforce Non-profit Starter Pack and the base CiviCRM platform. SugarCRM, another CRM system we looked at last time, did not respond to our requests for an update after multiple attempts, so we cannot share news on how that product has changed.

ShulCloud, a synagogue management system built on a proprietary online platform, also has a tab called "CRM" on its constituent profile that the vendor has added to address the sector's desire for robust relationship management power. MM2000, a vendor in the synagogue management space who's been around for several decades, announced to us that they are developing a connector between their system and a synagogue management system which is built on the Salesforce platform. Clearly, the CRM transition is in full swing for the synagogue management software marketplace.

## 2. Synagogue management is moving to the cloud.

Cloud-based systems are hosted by the vendor, meaning that a synagogue can access the software without a dedicated server by using the internet. The cloud-based model has had major implications for the synagogue management software market, as several lower-cost options that are designed to be easier to use and to maintain emerged as competitors to long-standing names in the market. Even the names of the two new systems included in this update with detailed reviews both have the word cloud in their names, indicating just how prevalent this trend has been in the synagogue management sector.

Another installed system, Rakefet, which at the time of our first report was slated for retirement by the vendor, is in the midst of being converted to Rakefet Online by Rakefet Unlimited, an independent company being launched by a former employee of the original software's vendor. Rakefet Online is scheduled to be launched in fall of 2014. iMIS, a member management system with a version that's been customized for synagogues and that Idealware reviewed in a shorter write-up in the original guide, also introduced a scaled-down, cloud-based version. A donor management system we profiled in brief, Talisma, has a hosted offering, too. One of our experts

welcomed this trend, saying that synagogues needed to fully embrace the transition to the cloud in order to modernize their internal workflows.

Generally, a synagogue doesn't need to worry about the security of keeping member data in the cloud. However, transitioning to a cloud-based model from installed software has significant implications in terms of short- and long-term budgeting, the hardware, internet connectivity, and IT support that a synagogue needs, and even its organizational culture. A good vendor will help you think through some of the changes your synagogue will face, but it's important to plan internally as well. Idealware's workbook *Should Your Organization Consider the Cloud?* might be helpful for synagogues considering this transition.

## 3. Synagogues aren't leaving their current systems.

In our interviews for this update as well as in other research efforts conducted by outside parties, the theme of synagogues sticking with their current databases rather than migrating to new solutions that might offer some additional functionality clearly emerged. Even when systems are quite out of date, and have been in place for years or even decades, synagogues report satisfaction with their current technology and workflows. But the experts we interviewed urged the synagogue sector to think critically about what their current systems offer, and whether technology is helping them to effectively engage with their members and the community at large.

In Idealware's *A Guide to Synagogue Management: Research and Recommendations*, we asked the basic question: what should a synagogue management system do? We answered that question by describing the functionality and technical capabilities that a modern synagogue management system should offer. The experts we spoke with encouraged synagogues to read that list and think about whether the system they have in place has the necessary capabilities before deciding that it is satisfactory.

Why aren't synagogues leaving their current systems, even when there are more up-to-date options? The reasons are manifold, but one that many of our experts named was financial. One posited that an average suburban synagogue's landscaping budget was probably

five or six times as large as its technology budget, and noted that in order to find more return on investment in technology and data, synagogues need to take a lesson from the for-profit sector and invest more. Even though there are many affordable options on the synagogue management market, starting at \$2,000 or \$3,000 a year, it's a cost for which some congregations just haven't budgeted. The migration process can also be quite costly, especially for vendors who don't offer that service as part of the overall contract.

Another of our experts pointed out that long contracts often signed with vendors mean that synagogues often stay with systems for many years. Several mentioned the planning required for transitioning systems as being a significant barrier, especially at synagogues that rely on volunteers and part-time staffers to help with administration. The selection process, data migration, training, and onboarding can take months or even years, not to mention many hours of staff time. For synagogues dealing with more immediate crises and potentially with staff turnover, a new or upgraded synagogue management system may not be a core priority. For those who do decide to move systems, realistic project milestones, clearly outlined schedules and deliverables, and careful project oversight by a team of stakeholders are core strategies that can make this process less painful.

#### **4. Customer service, rather than price or technological capability, is a major factor in vendor choice and satisfaction.**

Yet another reason that synagogues might be loath to leave their current systems stems from the well-regarded customer support that many long-standing vendors in the community offer. Our experts noted that many synagogues have nontechnical staffers or volunteers in charge of maintaining their synagogue management system. These staffers put a high premium on the ability to quickly reach a friendly and familiar voice—often simply by picking up the phone—when problems with the system arise. Transitioning to a new vendor who might direct you to online video tutorials or self-help wikis may seem off-putting and impersonal for these staffers, even if the information provided is of high quality and easy to follow.

More training and education about the basics of constituent management technology and data management within the sector could go a long way to help synagogue staffers feel more empowered when dealing with technical difficulties in their synagogue management systems. Our experts pointed out that the average synagogue doesn't have an IT department, and the accidental techies that keep the organization afloat are often self-taught and overburdened.

All new systems have a learning curve, but investing in the training of nontechnical staffers responsible for using the synagogue management system is critical. Such up-front training can impart the lesson that technology streamlines processes and makes life easier. For synagogues that are making the transition to a new system, hours spent testing to help staff and vendors reach a better understanding about a synagogue's workflow and find kinks in the system are also invaluable, and might prevent at least some customer service inquiries.

#### **5. The synagogue management sector hasn't changed as quickly as observers might have predicted.**

The synagogue management system marketplace has seen some significant evolution over the past year and a half. There are new systems available, and others that are in the planning stages. Long-standing vendors in the community are adopting innovations like online payments, member portals, and CRM functionality. But several experts we spoke with felt like the change that was beginning to happen a few years ago has stalled. Most synagogues are sticking with the systems and workflows they have in place, and report a general satisfaction with them and no plans to migrate anytime soon. Few seem to be exploring systems that haven't traditionally been marketed to synagogues, although in our original guide Idealware presented research indicating that well-regarded, high-value constituent management systems from other sectors like membership management might well meet the needs of many synagogues with only minimal customization. Compared to the church management sector, noted one person we interviewed who is familiar with both sectors, the synagogue management sector is

significantly less advanced in technological capabilities, cost effectiveness, and user experience.

In noting this slower pace of change, one of our experts argued that before widespread innovation in the synagogue management sector can happen, “synagogue culture has to change first.” Vendors act in direct response to consumer demand. Nearly every vendor we researched for this report identified as a core strength their willingness to listen to their clients about the upgrade path of their systems and the direction that the solution’s roadmap should take. But the reverse is true as well—if clients don’t ask for change, the vendors may not adopt it.

Rabbis, boards, and congregants alike need to join synagogue staffers in recognizing the power of data and up-to-date constituent management processes in invigorating and transforming synagogue culture. Synagogue management systems have the potential to be more than just data recording devices: they can be sophisticated tools to measure engagement and improve programs. But the synagogue sector, along with partners and networks that support it, need to understand and place value on the power of smart data management in engaging congregations. When the entire synagogue sector begins to drive the change, the technological evolution may truly be felt.

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# SUMMARY OF CHANGES REPORTED BY THE VENDORS

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*Please note that these changes have not been verified through demos or other research by Idealware. We have reproduced vendor's comments exactly except for fixing typos, grammar, and punctuation when necessary.*

## Synagogue Management Systems

### Chaverware

The most significant changes reported relate to the price of the system, online new member signup, a new help wiki, and the number of custom fields available to users.

- As a change for the next six to 12 months, the vendor reported: “Our Chaverware 6 (browser version) development is complete and is currently in beta with public release imminent. As a result many of the limitations listed in the original report are no longer there.”
- The price has increased from \$3,100 to \$3,300 for one year of support and three user licenses.
- The price for the optional ChaverWeb has increased from \$1 to \$1.25 per household, per year.
- Relationship Tracking: Communications Tracking
  - Idealware published: It’s not possible to see a quick summary of all recent communications and constituent actions, such as phone calls or personal meetings, and a record of all system-generated letters and emails for each constituent in one place.
  - The vendor commented: “This is possible through the note functionality.”
- Relationship Tracking: Prospecting Workflow for Constituents
  - Idealware published: There’s no clear way to assign a priority and a stage to a constituent to manage a prospecting workflow.
  - The vendor commented: “This is very possible although it might not be ‘clear’.”
- Relationship Tracking: Prospecting Workflow for Organizations
  - Idealware published: There’s no clear way to assign a priority and a stage to an organization to manage a prospecting workflow.
  - The vendor commented: “This is very possible although it might not be ‘clear’.”
- Membership Tracking: Online New Member Signup
  - Idealware published: It’s not possible to sign up online for a membership.
  - The vendor commented: “This is possible now.”
- Yahrzeits: Yahrzeit Plaques
  - Idealware published: It’s not possible to automatically turn on the physical lights for the appropriate plaques for the week’s Yahrzeits.
  - The vendor commented: “Can be integrated with different manufacturer’s automated systems.”

- Email: Sending Broadcast Emails
  - Idealware published: Lets you send broadcast emails directly from the constituent database to defined or ad hoc groups through an integration with Constant Contact.
  - The vendor commented: “or through your ‘regular’ email program.”
- Customization: Dropdowns
  - Idealware published: You can control dropdown values for fields such as campaigns, type of relationships, and most other characteristics of the system, except for Gender and Bar Mitzvah.
  - The vendor commented: “This should say ‘Bar Mitzvah Portion’.”
- Customization: Customization Process
  - Idealware published: The system has limited customization options available to employees of the synagogue. For most major changes to the system, the vendor would need to be contacted and can provide changes on a fee-for-service basis.
  - The vendor commented: “Changes have never been done on a fee-for-service basis. Always done at no charge enhancement update.”
- Customization: API
  - Idealware published: It’s possible to access the API in order to update or add functionality, but the vendor would need to approve this on a case-by-case basis.
  - The vendor commented: “This is available for the asking. No need to be “approved” on a case-by-case basis.”
- Usability, Support, and Documentation: Process Documentation
  - Idealware published: There’s no way to process documentation to help staff understand how they’re supposed to enter data to aid consistency.
  - The vendor commented: “We have added a user accessible online Wiki.”
- Reporting and Querying: Dashboards
  - Idealware published: There aren’t useful dashboards that help you track overall metrics about programs and finances.
  - The vendor commented: “Now available in our Chaverware 6 online version.”

## MM2000

The most significant changes reported relate to new add-on integration with the Salesforce CRM platform. In April of 2014, the vendor reported that seven synagogues were in different stages of implementing the integration, and that the product was still under development.

- As a change for the next six to 12 months, the vendor reports: “We are moving to a web based product by using Salesforce as a basis for MM2000+, our new application. This gives us a way to provide CRM features while still maintaining the traditional needs of synagogue software.” This replaces the web-based version that MM2000 reported was in development at the publication of the guide in January 2013.
- The price for MM2000 was published as \$2,750 for a license for a concurrent user, and \$3,350 for four additional users, with additional modules increasing the price.
- The price for MM2000+, an add-on to the core product, is an additional \$3000 and includes the integration program, implementation and training on using Salesforce.
- In the narrative summary, Idealware published:
  - “For broadcast email, MM2000 includes an additional Email Blast module that handles broadcast email either through its internal client or through export to Constant Contact or other broadcast email providers.”
  - The vendor commented: “We have modified our Email Blast module to provide API connections to both Constant Contact and MailChimp so that MM2000 can transfer or create lists with the press of a button.”
- In the narrative summary, Idealware published:
  - “Menus and fields also aren’t customizable. Canned reports are plentiful and seem useful, but to create custom reports, a user must understand ODBC protocol or interface with Crystal Reports. The user is also somewhat limited to the out-of-the box interface in terms of member data to track and store. The aforementioned outdated design has a slightly negative effect on user experience, although this will probably be rectified in the upcoming web-based version.”
  - The vendor commented: “Salesforce(R) integration gives the synagogue the ability to add fields or entire screens to accommodate custom modifications without modifying the base program. MM2000+ will also include the Salesforce(R) report writer.”
- Family Units and Households: Alumni Members
  - Idealware published: It’s not possible to track an “alumni”—a young adult who is no longer a member but was a part of an active household—in a way that relates the individual to their former household in a meaningful way.”
  - The vendor commented: “Alumni Members can now be moved to the Member database with the click of a button. This includes removing them from the child database and creating their own Member record. It also creates the relationship in the Relatives database so you can see the relationship between parents and children.”
- Basic Constituent Tracking: Activity and Attendance
  - Idealware published: It’s not possible to see all the recent activity tracked for an individual associated with a family unit, such as event attendance, in one place. You must record activities, clergy/staff interactions, and event attendance in different, compartmental places. To see constituents who are less involved, you’d need to run an exception report.
  - The vendor commented: “Salesforce (R) includes recent and past activity tracked for an individual for activities and event attendance. It is easy to implement and report on.”
- Basic Constituent Tracking: Occupation Tracking
  - Idealware published: Lets you track the occupation of the adults in the household, but not job history or organization.
  - The vendor commented: “Salesforce now gives us the ability to track member job histories.”

- Basic Constituent Tracking: Volunteer Matching
  - Idealware published: It's not possible to track an individual's interests and skills through customizable fields to match them with potential volunteer opportunities, although you could accomplish this through attributes to match them with potential volunteer opportunities. There's no shift scheduling.
  - The vendor commented: "Reporting on interests to match volunteers is now also available."
- Relationship Tracking: Communications Tracking
  - Idealware published: It's not possible to see a quick summary of all recent communications and constituent actions in one place, including a manual log of communications with each constituent, such as phone calls or personal meetings, and a record of all system-generated letters and emails for each constituent.
  - The vendor commented: "MM2000's integration with Salesforce (R) includes tracking and logging of individual member communications."
- Relationship Tracking: Prospecting Workflow for Organizations
  - Idealware published: There's no way to assign a priority and a stage to an organization to manage a prospecting workflow.
  - The vendor commented: "The Salesforce integration enables the client to now do this."
- Relationship Tracking: Autoreminders
  - Idealware published: It's possible to create a reminder for yourself for a particular constituent, task and date, and show it prominently at that time by entering a note on the member record and recording a due date for it. It is not possible to do this for another staff member.
  - The vendor commented: "Salesforce (R) allows one staff member to create notes and assign to another staff member."
- Relationship Tracking: Clergy Interactions
  - Idealware published: It's not possible to track who has had recent interactions with a clergy member (to be able to find those who haven't) unless that is tracked as an attribute.
  - The vendor commented: "Salesforce (R) allows one staff member to create notes and assign to another staff member."
- Relationship Tracking: Pastoral Care
  - Idealware published: "It's possible to track when a member is in the hospital or homebound through attributes, but not coordinate visitation."
  - The vendor commented: "Salesforce (R) allows one staff member to create notes and assign to another staff member."
- Event Management: Historical Event Attendance
  - Idealware published: It's not possible to see what constituents came to which event on their constituent record screens.
  - The vendor commented: "Salesforce (R) includes historical event attendance."
- Event Management: Batch Event Importing
  - Idealware published: It's not possible to add or import basic information about a list of event attendees.
  - The vendor commented: "Salesforce (R) includes batch event importing."
- Customization: Custom Fields
  - Idealware published: It's not possible to add custom fields.
  - The vendor commented: "Custom fields can be added in the Salesforce (R) implementations."

- Usability, Support, and Documentation: Process Documentation
  - Idealware published: There's no way to process documentation to help staff understand how they're supposed to enter data to aid consistency.
  - The vendor commented: "All help documents (tutorials) are available to be modified by staff to create not just a User's Guide but an Implementation Guide."
- Reporting and Querying: Querying
  - Idealware published: The query-building process for a set of constituents who meet criteria for a standard set of fields is complex, and you cannot create a flexible query for a set of constituents based on almost any field in the database.
  - The vendor commented: "Salesforce has an easy to use Report Writer."

## ShulSuite

The vendor reported significant changes in a number of areas, including accounting, facility management, volunteer management, and donation tracking.

- The vendor did not explicitly report changes for the upcoming six to 12 months.
- In the narrative, Idealware published:
  - The software is robust in most areas we looked at, but isn't immediately intuitive for new users; the learning curve may be steep.
  - The vendor commented: "We have made a number of improvements focused on ease of use and making the system easier to learn for new users."
- In the narrative, Idealware published:
  - The software seamlessly integrates with QuickBooks and other widely used general ledger software.
  - The vendor commented: "There are significant improvements in this area allowing financial end-users to create accounting batches that line up with their deposits or other processes/filters that they prefer. The user can choose their own batching work flow (including the batch names) to match their processes."
- In the narrative, Idealware published:
  - The system favors email for constituent correspondence, even in cases when paper mail might make more sense.
  - The vendor commented: "Options to create paper communication have been added to many additional screens. This makes it much more convenient to use paper communication whenever the user chooses."
- In the narrative, Idealware published:
  - Visitors to your synagogue's website who don't have a login can also RSVP for events and make payments.
  - The vendor commented: "We have added features to make it very easy for end-users preparing emails and email blasts to include personalized hyperlinks to each recipient of the email. When a recipient clicks a link from an email, the page is presented as if they are logged in."
- In the overall category of Basic Constituent Tracking:
  - The vendor commented: "A new set of CiviCRM extensions called CiviHR allows synagogues robust tracking of information and processes related to managing staff and volunteers. This includes tracking credentials and certifications and common human resource workflow such as training, hiring, and much more."
- Basic Constituent Tracking: Volunteer Matching
  - Idealware published: Lets you track an individual's interests and skills through customizable fields to match them with potential volunteer opportunities.
  - The vendor commented: "There is significant new functionality for volunteering from the CiviVolunteer and customizations from Pogstone. The synagogue can now define one or more shifts at various times and days, needing various roles, such as deliver food, visit a person, babysit, or synagogue-defined roles. Then the synagogue can publicize the link, and visitors/members can see what shifts are still open and choose a shift that they want. ShulSuite will automatically not show shifts that are already full. There are also tools for a lay leader/staff to assign volunteers to open shifts and track volunteer hours actually performed. Each volunteer project is associated with a beneficiary so that the synagogue can easily report on whom or what is receiving various assistance."
- Relationship Tracking: Prospecting Workflow for Constituents
  - Idealware published: Lets you assign a priority, a stage, and a next action to a constituent to manage a prospecting workflow using the CiviCase function.
  - The vendor commented: "There is a significant extension from the CiviCRM community under active development to automate most or all of the workflow around constituent/organization Journeys. This means the

system will automatically react and send personalized, data-driven communication to the constituent based on configurable milestones, such as a special communication recognizing the 5th donation, or the 10th membership renewal.”

- Basic Constituent Tracking: Pastoral Care
  - Idealware published: Lets you track when a member is in the hospital or homebound and track who will visit them and when through the CiviCase process management feature.
  - The vendor commented: “As previously described, these processes can also be set up as volunteer shifts and a link shared with potential volunteers. This allows potential volunteers to see what shifts/needs are still open and sign up for the one they prefer.”
- Membership Tracking: Online Payments
  - Idealware published: Lets you accept payments online via credit card only. A member can also elect to “pay later.”
  - The vendor commented: “ShulSuite now offers ACH (also called Direct Debit or EFT) for online or back-office payments. Fees for ACH are a flat transaction fee around 26 cents. ACH Fees are NOT a percent of the transaction.”
- Event Management: RSVPs
  - Idealware published: Lets you easily log, view, and print who has RSVP’d or registered for a particular event.
  - The vendor commented: “Attendance can be done via a specialized mobile tool.”
- Event Management: Historical Event Attendance
  - Idealware published: Lets you easily flag which constituents came to a particular event on their records.
  - The vendor commented: “Synagogues can now design and print their own tickets and name badges, including features like QR codes and regular bar codes.”
- In the overall category of Donation Tracking:
  - The vendor commented: “The synagogue can define their own soft credit ‘types’ and can split a soft credit to multiple contacts.”
- Donation Tracking: Checkoff Contributions
  - Idealware published: Lets you automatically add a line item on invoices for constituents opting in for a “check-off contribution,” alongside their membership fee, but it won’t go to a separate GL account code. This can be reflected through reports, which can then be used to manually split the gift for export to the GL software. The vendor reports that this will be adjusted in the December 2012 release of ShulSuite.
  - The vendor commented: “This was completed as planned. A visitor/member can pay for an event or contribution with the split to various GL codes happening automatically. A staff member can also manually record a split contribution for both one-time contributions and/or automated recurring contributions.”
- In the overall category of Facility and Staff Scheduling:
  - The vendor commented: “This area of the system has been completely changed to take advantage of Civi-Booking. There is a robust administration area to allow creation of various resources that could be booked. Resources could be a room, a person, a piece of equipment, or other resource types defined by the synagogue. This allows for setup of various standard and optional pricing associated with each resource. There is built in workflow to allow the person who is creating a booking to accept a deposit or full payment, and add optional items such as coffee/tea service.”
- Accounting Integration: Batches
  - Idealware published: Lets you create and track accounting batches in order to ease the reconciliation process with an accounting system. Lets you batch and transfer payments received online into the accounting system.
  - The vendor commented: “As noted earlier in this report, there have been significant improvements to the accounting batch area, including allowing synagogues to choose their batch processes and naming convention for batches.”

- Cemetery Management: Plot Management
  - Idealware published: Lets you track plots through custom fields.
  - The vendor commented: “These fields are part of ShulSuite core.”
- Cemetery Management: Plaque Management
  - Idealware published: It’s possible to associate if there’s a memorial plaque associated with a plot through custom fields.
  - The vendor commented: “These fields are part of ShulSuite core.”
- Reporting and Querying: Ad Hoc Reports
  - Idealware published: Lets you easily create ad hoc reports that allow staff to define what rows, columns, formulas, and formats are used, but doesn’t intuitively save a report.
  - The vendor commented: “The ease of use for saving reports has been improved.”

## Rakefet Online, by Rakefet Unlimited

Rakefet is an installed, Window-based synagogue management system that's been available for 25 years, but at the time of our research for "A Guide to Synagogue Management," the vendor was planning to discontinue the product. For this reason, Idealware did not include Rakefet in either the shorter or more detailed product write-ups in the guide. Recently, the vendor announced that a third-party entity, Rakefet Unlimited, would be creating a cloud-based version based on the original software. Rakefet Unlimited is also providing customer support for existing Rakefet customers, and provided Idealware with more details on the planned product.

Rakefet Online, as the new system will be known, will be "written from the ground up in the business language of Rakefet for Windows," to quote the vendors' marketing materials. The synagogue management system will be hosted, or cloud-based, and is set for public release in September of 2014. Rakefet Unlimited also shared more information about Rakefet Online in June of 2014. For the initial launch, Rakefet Online will include membership tracking, email, direct mail, Yahrzeits, general ledger, budgeting, online payments, High Holiday seating, and school management. The vendor also reports the ability to support fundraising.

After the initial launch in September, the vendor says that they will add event management and registration, cloud storage, Purim baskets, and the capability to export and import financial information in between popular accounting systems. No time frame was stated for this additional functionality.

There will be two tiers of pricing: one for current Rakefet Unlimited users that costs \$480 per year for unlimited users for an annual contract, and one for new users that costs \$1,080 per year for the first year for unlimited users and \$480 per year for unlimited users for an annual contract after that. The pricing includes support.

Idealware has not independently verified the existence of any of this functionality, but at this price point, Rakefet Online could be a valid choice for smaller synagogues that want a cloud-based system and don't need event management and accounting integration right away. Of course, we recommend that any synagogue interested in Rakefet Online do extensive research, including a product demo, before signing up for the product, even if you are already a Rakefet customer.

# CRM Platforms

## CiviCRM

The most significant changes relate to new volunteer and space management modules, and the ability to apply payment from one constituent to another's account.

- As a change for the next six to 12 months, the vendor commented:
  - “The upcoming 4.5 release (release scheduled for 2nd quarter 2014) will include: A “Donor Journeys” extension providing automation of highly personalized donor messaging; Enhanced Soft Credit / Tribute support (batch import, advanced search, and reporting); Partial payments for events; and Drag and drop form builder for data collection and surveys.”
- Basic Constituent Tracking: Volunteer Matching
  - Idealware published: Lets you track an individual's interests and skills through customizable fields to match them with potential volunteer opportunities.
  - The vendor commented: “The current release (4.4) includes CiviVolunteer, a volunteer recruitment, tracking, and reporting extension. Synagogues will be able to use this for managing event volunteers, service projects, etc.”
- Membership Tracking: Online Payments
  - Idealware published: Lets you accept payments online via credit card only.
  - The vendor commented: “Support for additional payment processors is provided in 4.4, including IATS which offers ACH payments (ACH transactions are significantly lower cost than credit card transactions).”
- Overall Online Interactions: Payment Codes
  - Idealware published: Lets you automatically pass online payment data to the system, but without accounting codes.
  - The vendor commented: “Accounting codes are associated with each type of ‘fee’ and donation. Online and offline payment records include the corresponding codes.”
- Overall Online Interactions: CMS
  - Idealware published: Helps manage a synagogue's website through the Drupal CMS.
  - The vendor commented: “Helps manage a synagogue's website through tight integration with Drupal, WordPress, or Joomla CMSs.”
- Facility and Staff Scheduling: Calendaring for Space Rentals
  - Idealware published: It's not possible to view what spaces are booked and which are available in a calendar format, or who has booked which space.
  - The vendor commented: “The current release (4.4) includes CiviBooking, a robust facilities and equipment booking component. Synagogues can use this component to manage bookings for member events (weddings, bar mitzvahs...) as well as facility and equipment rentals.”
- Access and Security: Remote Access
  - Idealware published: There's no option to access constituent data through a remote browser, but the system is web-based so you can access it remotely.
  - The vendor commented: “The system is web-based so staff that have been granted access can view and update constituent data remotely through a web browser or smartphone.”
- Access and Security: Constituent Access
  - Idealware published: There's no granularity in terms of access to different types of constituents for different

staff users.

- The vendor commented: “Different staff members can be granted access to different types of constituents, synagogue staff, and board members using built-in access control lists.”
- Direct Mail: Labels
  - Idealware published: It’s not possible to generate labels for an ad hoc query of constituents.
  - The vendor commented: “It’s possible to generate labels for any ad hoc or saved query of constituents.”
- Invoicing and Payments: Constituents Paying for Others
  - Idealware published: It’s not possible to apply payment from one constituent to pay another’s invoice.
  - The vendor commented: “The current release (4.4) allows staff to apply payments by one constituent for another constituent’s invoice.”
- Usability, Support, and Documentation: IT Skills
  - Idealware published: You’ll need someone with CiviCRM skills to support the database.
  - The vendor commented: “You’ll need someone with CiviCRM skills to support the database, or you can utilize one of the turn-key hosting providers that specialize in CiviCRM (<http://civicrm.org/providers/hosting>).”

## Salesforce Nonprofit Starter Pack

The most significant changes reported relate to more information about the built-in email functionality and the payments and invoicing capabilities, although big changes are in store for the Nonprofit Starter Pack.

- Although the vendor did not report this planned change, the next six to 12 months will see a major overhaul of the Salesforce Nonprofit Starter Pack's core packages, including the Households functionality. The overhaul is currently in beta testing through a pilot program.
- Idealware no longer recommends Acteva as an option for event management through Salesforce due to widely publicized issues of non-payment to clients. See our guide *The Landscape of Salesforce for Nonprofits: A Report on the Current Marketplace for Apps* for alternatives.
- In the narrative, Idealware published:
  - For instance, there's no clear way to manage your synagogue's events in Salesforce without an external app like Acteva, nor can you give your constituents access to a member portal to register for events or other useful online interactions or integrate the software with your synagogue's website out of the box. For this you'd need to implement an app called SiteForce, which could potentially cost your synagogue thousands of dollars per year.
  - The vendor commented: "There are a variety of CMS tools available, any one of which would integrate with Salesforce. SiteForce is not required."
- Observances and Gift Exchanges: Gift Messages
  - Idealware published: You can't track personal messages for gifts.
  - The vendor commented: "This is possible with a custom field."
- Observances and Gift Exchanges: Batch Entry
  - Idealware published: It's not possible to batch enter tributes in support of physical gifts without an external app.
  - The vendor commented: "You can utilize the built-in batch entry application to enter gifts."
- Observances and Gift Exchanges: Gift Acknowledgement and Delivery
  - Idealware published: It's not possible to report on who supported or who should receive an individual Leagram or Purim basket without an external app.
  - The vendor commented: "You could do this with some minor customizations."
- Donation Tracking: Quick Entry
  - Idealware published: It's not possible to quickly enter a number of gifts at one time through a streamlined quick-entry interface out of the box.
  - The vendor commented: "The batch entry tool would allow you to do this with a single interface."
- Overall Online Interactions: Online Profile
  - Idealware published: Lets constituents view their own profile online and update their contact information, receive a notification when constituents update their profiles, lets constituents update information online about their children (names, birthdates, schools) and lets constituents update their own online profile of interests, skills, and occupation with an external tool, Soapbox Engage.
  - The vendor commented: "This can also be customized using the Salesforce Communities product."
- Email: Sending Broadcast Emails
  - Idealware published: It's possible to send broadcast emails directly from the database without an external app, but has limitations in terms of number of emails sent per day and spam issues. Broadcast email apps include Vertical Response, Predictive Response, and Exact Target.
  - The vendor commented: "There are no spam issues that I'm aware of."

- Email: Graphic Templates
  - Idealware published: It's not possible to use graphic templates to send broadcast emails without an external app, like Conga Merge.
  - The vendor commented: "There is limited baked-in email functionality in SFDC."
- Email: Statements
  - Idealware published: It's not possible to send out invoices and statements via email rather than mail without an external app, like Conga Merge.
  - The vendor commented: "There is built-in email functionality. This is possible."
- Direct Mail: Tax Letters
  - Idealware published: It's not possible to automatically generate year-end tax letters which summarize all tax-deductible donations, for each constituent.
  - The vendor commented: "It is possible but requires some small customizations (merge templates, etc.)."
- Accounting Integration: Batches
  - Idealware published: It's not possible to create and track accounting batches in order to ease the reconciliation process with an accounting system or batch and transfer payments received online into the accounting system. It's not possible to link a batch to a deposit slip number to tie it back to the accounting system or batch and transfer payments received online into the accounting system.
  - The vendor commented: "The batch entry tool (included with the NPSP) allows this behavior."
- Invoicing and Payments: One-Offs
  - Idealware published: It's not possible to create a one-off invoice for a single payment; you have to go through a batch process.
  - The vendor commented: "You can generate a one-off invoice."
- Invoicing and Payments: Aging Report
  - Idealware published: There's no built-in aging report, but you could create one without too much difficulty.
  - The vendor commented: "Opportunity aging reports are built-in."
- Invoicing and Payments: Other Invoicing
  - Idealware published: It's not currently possible to apply a payment to any specific invoice or pledge in the system, or to collect standard payment info: date, amount, payment types that are configurable, check number, etc. in a way that's passed to the GL system. It's not possible to define how much of an applied payment is tax-deductible vs. non-deductible or to write off an invoice as unreceivable.
  - The vendor commented: "The payment object allows you to track payments to pledges or invoices within the system."

## SugarCRM

The vendor did not respond to multiple requests by Idealware to update the review of its system.

# Donor Management, Church Management, and Membership Management Systems

## The Raiser's Edge by Blackbaud

The most significant changes reported relate to the price of the system, a discontinued event management platform, and some terminology changes.

- The vendor did not report changes for the next six to 12 months.
- The vendor reported that the price for a single license is \$10,000 including implementation, rather than \$6,300.
- The vendor reported that instead of NetCommunity handling broadcast email and online functionality, they now simply refer to The Raiser's Edge's online marketing platform.
- Event Management: Seat Map
  - Idealware published: It's not possible to see a seating map either for staffers or online, although this is available in another software package that integrates with RE, Patron Edge.
  - The vendor commented: "Blackbaud no longer actively sells this product [Patron Edge]."

## Shelby

The most significant changes reported relate to tribute gifts and a new financial package, Shelby Financials Online, which is cloud-based.

- In the narrative, Idealware published:
  - The systems currently work in tandem—most of the accounting power of Shelby is in the installed version, while event management and household and individual records are mostly maintained in Arena.
  - The vendor commented: “We have added an additional financial package [Shelby Financials Online] that is also html based. It works direct with Arena, even installed in the same database. Applications available are General Ledger, Accounts Payable, Payroll, and Bank Account Management. Accounts Receivable and Fixed Assets are due for release May 15 and Purchase Order is due for release June 15.”
- In the narrative, Idealware published:
  - Tribute gifts in honor of another person are not yet accommodated, but the vendor says this will be added in a future release.
  - The vendor commented: “Tribute gifts in honor of another person are now accommodated.”

## Tessitura

The vendor reported that there were no changes to the review published in January 2013.

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# **INDEX OF NEW SYSTEMS**

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# CLOUD FOR SYNAGOGUES

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Cloud for Synagogues is a powerful web-based product built on the Salesforce CRM platform from Cloud for Good, a consulting firm that specializes in implementing Google Apps and Salesforce CRM with non-profit clients. The product was still under development when we did the research for the January 2013 Guide to Synagogue Management, but the product is now complete and live at more than 20 synagogues. Cloud for Synagogues is very capable at handling family units, member tracking, and Yahrzeits. Cloud for Good also has an accounts receivable module, sophisticated event management support, and the ability to support a synagogue's fundraising program. Cloud for Synagogues' outward-facing web portal allows synagogue members to edit their own demographic data and settle their accounts. Cloud for Synagogues starts at \$1,800 a year for the most basic package of up to five synagogue staff users, with additional costs for staffers beyond that. Data migration is also available from about \$3,000 and up, and remote or on-site training is available at \$150 per hour.

Cloud for Synagogues is built upon the Salesforce CRM platform, and can therefore use products from Salesforce's AppExchange to enhance its abilities. Some of these apps are available for free or at significant discounts for non-profits. Cloud for Synagogues' strength lies in its powerful customizability and up-to-date technology. For instance, users can quickly build reports or real-time dashboards that contain any data they think might be helpful. It has built-in links to social media tools like Twitter and Facebook, making it easy to engage your congregation and keep them in the loop, and integrates with both Outlook and Google Apps. As with other Salesforce products, Cloud for Synagogues appears pretty user-friendly and easy to learn, but if you run into trouble, 2.5 hours of customer service is available each month with subscription costs. The system also has an online user community and a helpful online knowledge base.

Most of the synagogue specific features that we reviewed for are included with the basic package. For instance, you can easily record demographic and religious information about members at the individual and household levels and see a graphic representation of their relationships to other members and nonmembers in the database. Member billing cycles and tiers are flexible and easy to tailor, too. Volunteer management is included as well, to help a synagogue keep track of its congregation's interests and donated service. Broadcast email can be handled at extra cost by VerticalResponse, MailChimp, or any of the other numerous services that integrate with the Salesforce platform. Since out-of-the-box Salesforce doesn't have a strong ability to merge information into email and documents, Cloud for Synagogues effectively uses the merge tools to fill this gap.

Online donation forms have the well-regarded FormAssembly as their technical underpinnings, and allow constituents to pay for events or their membership dues by credit card. You can merge invoices from Excel and export information to accounting software, like QuickBooks, without additional charge. Event management is sophisticated—a user can quickly build a microsite for a special event, track RSVPs and attendance, manage waitlists and overflow, and see a member's historical event attendance. There's even an airline-style seating map that lets staffers see where members sit during the high holidays, and what seats are vacant.

Donations and grants in Cloud for Synagogues are all tracked under the Batch Reporting Invoice area of the system, even if they are still prospects. This is sometimes awkward—you're tracking an invoice for a grant even when it's still in the research stage, for instance—but has more to do with the way that the Salesforce system is configured to track

financial opportunities than the way that Cloud for Synagogues has been set up. Reporting is strong—using the Salesforce ad hoc reporting structure, users can quickly configure their own custom reports, and it comes out of the box with some reports of use to synagogues, like LYBUNT and SYBUNT reports.

Yahrzeit tracking is simple and easy to update and allows for automatic email reminders and tracking against both the Hebrew and Gregorian calendars. Synagogues can easily generate a list of Yahrzeits occurring in a particular Hebrew date range against the Gregorian calendar, and all constituents to be notified (members and nonmembers). A school management module, which allows for attendance tracking and batched entry and promotion of students, seems useful as well.

Cloud for Good has also rolled out an attractive outward-facing member portal, which allows users to log in, update their profile, and register for events. Cloud for Synagogues is a compelling option for synagogues looking to move to the cloud and interested in a user-friendly, customizable, and tech-forward system. Cloud for Synagogues starts at \$1,800 annually for a five-user staff logon package, with additional fees for more staff logons, and increased cost for add-on modules to support advanced mail merge capabilities and online registrations, which some synagogues will want to implement. Data migration is also available from about \$3,000 and up, and remote/on-site training is an option for \$150 an hour.

### Family Units and Households

- **Family Unit Summary:** Lets you easily see in one place all individuals associated with a particular family unit, including kids and any other household members.
- **Family Unit Details:** Lets you track main address, contact information, and membership status for a family unit.
- **Same Name Tracking:** Lets you easily track multiple family units with the same family name.
- **Deceased Household Members:** Lets you mark and easily print out mailing labels with the deceased member excluded, if an individual is marked as deceased. This will also trigger a Yahrzeit entry.
- **Member Status:** Lets you mark that a family unit has resigned, has been suspended, or is no longer active. Some common membership scenarios, “canceled” and “expired” come out of the box. You can configure the system to mark these statuses automatically if a member is in arrears. For other special statuses, a synagogue could create additional custom statuses to track. You can also represent membership status through a flag.
- **Alumni Members:** Lets you track an “alumni”—someone who is no longer a member but was—through tracking the history of the person’s membership on their record.
- **Divorce and Alternative Family Scenarios:** Lets you easily move existing contacts with all their relationships into a new or existing family unit. Lets you associate a child with two family units. Lets you account for non-traditional families (i.e., long-term non-married couples, same-sex marriages, mixed-faith marriages). Cloud for Synagogues comes with some common relationship types built-in, and a synagogue staffer could create additional relationships as needed.
- **Multiple Addresses:** Lets you track seasonal addresses for a family unit, including start and end dates.

### Basic Constituent Tracking

- **Activity and Attendance:** Lets you see all the recent activity tracked for an individual associated with a family unit, such as event attendance, through the Outreach history. You can also gather more quantitative data about activities like event attendance through an engagement index.
- **Relationship Tracking Outside Households:** Lets you track and customize non-family relationships between individuals in the database.
- **Member/Nonmember Tracking:** Lets you enter any individual into the database, even if not a member, and easily exclude nonmembers from member datasets. Lets you distinguish between different tiers of members and nonmembers in the database.
- **Demographic Tracking:** Lets you track and customize basic demographic information, such as email, phone number, birthday, age, and gender, of every constituent.

- **Faith and Observance Tracking:** Lets you track what tradition or movement an individual was raised in, how kosher they keep, if they've been to Israel, whether an individual is Jewish (in a mixed-marriage household), and other faith and observance information through a mix of custom and built-in fields.
- **Occupation Tracking:** Lets you track the occupation and job history of all adults in the household, and link to the organizations associated with them.
- **Volunteer Matching:** Lets you track an individual's interests and skills through customizable fields to match them with potential volunteer opportunities. For more robust volunteer tracking, you can use the Salesforce App Volunteers for Salesforce.
- **Full Name Tracking:** Lets you track the full name for each constituent in a household to account for spouses or kids with different last names.
- **Constituent Source:** Lets you manually or automatically associate the source of a constituent with an event or another constituent using a "source" field that is standard on every contact.
- **Social Media:** Lets you link to constituents' social media pages within their records through Salesforce Social Contacts at no additional cost.
- **Group and Committee Tracking:** Lets you track who in a household is a member of a group, committee, or auxiliary, track hours and involvement, and easily see everyone who's in that group. The vendor encourages the use of the Chatter feature to capture conversations and interactions between committee members.
- **Batch Constituent Entry:** Lets you easily add or import basic information about a number of constituents at once.
- **Children:** Lets you track and automatically calculate a child's age through built-in fields. College and day school enrollment are tracked in a dedicated place on the constituent record.

### Relationship Tracking

- **Communications Tracking:** Lets you see a quick summary of all recent communications and constituent actions in one place, including a manual log of communications with each constituent, such as phone calls or personal meetings, and a record of all system-generated letters and emails for each constituent. You can also bcc the system from your email program to record conversations on constituent or organizational profiles. The system can also integrate with Microsoft Outlook.
- **Duplicate Tracking:** Lets you easily merge two records if it becomes apparent that those records are duplicates through a dedicated Merge Contacts tool.
- **Prospecting Workflow for Constituents:** Lets you assign a priority, a stage, and a next action to a constituent to manage a prospecting workflow using the Task functionality and the Invoice functionality.
- **Prospecting Workflow for Organizations:** Lets you assign a priority, a stage, and a next action to an organization to manage a prospecting workflow using the Task functionality and the Invoice functionality.
- **Autoremindes:** Lets you create a reminder for yourself or other staff for a particular constituent, task, and date and show it prominently at that time through the Task functionality.
- **Clergy Interactions:** Lets you track which constituents have had recent interactions with a clergy member by tracking those interactions as "activities," and see who hasn't by reporting who hasn't been associated with that activity.
- **Pastoral Care:** Lets you track when a member is in the hospital or homebound and trigger reminders on staff accounts to visit them through Tasks or through the Chatter functionality.
- **Buddy System:** It's possible to conduct a buddy system program, where new members are paired up with an existing member, by configuring a "Relationship" type of "Buddy" and associating the two.

## Membership Tracking

- **Member Payments:** Lets you associate payments for events and membership dues with family units for billing purposes.
- **Membership Types:** Lets you track the membership type for a family unit (i.e., single, family, senior, etc.), and you can customize the types.
- **Membership Benefits:** Lets you easily associate membership prices with desired seating for the high holidays or other benefits.
- **New Member Signup:** Lets you easily enter the information to sign up a new member.
- **Batch Invoicing:** Lets you automatically generate invoices for a new cycle of membership dues in batch for all members.
- **Outstanding Payments:** Lets you easily see who has paid outstanding membership dues or event fees and who has not through standard reports.
- **Member Fee Discounts:** Lets you define a discounted membership fee for a particular family member, which is then billed accordingly, and the discounted amount is tracked. You need to do this through an adjustment on an invoice. It's possible to add a note on the invoice to track the reason for the discount.
- **Online Payments:** Lets you collect payments online through FormAssembly and a payment processor.
- **Online New Member Signup:** Lets a prospective member fill out their membership form online, and pass data into the database through FormAssembly.

## Event Management

- **Event Seating (High Holidays):** Lets you easily book and bill seat purchases, for general admission to specific areas, with member and nonmember prices. Allows for "airline-style" seat management on the back end for high holidays, which is linked to membership records.
- **Online Registration:** Lets people RSVP for the events online for general admission, with member and nonmember prices. The system has a waitlist status, but does not help you manage the waitlist automatically.
- **Seat Map:** Lets staffers see a seating map.
- **RSVPs:** Lets you easily log, view, and print a list of who has RSVP'd or registered for a particular event.
- **Historical Event Attendance:** Lets you easily flag which constituents came to a particular event on their record through the Outreach functionality.
- **Batch Event Importing:** Lets you easily add or import basic information about a list of event attendees, including ones not currently in the database.
- **Honor Tracking:** Lets you track who served as aliyahs or other honors in the past, with what specifically they did on what date, through built-in fields. Lets you track the Hebrew date that an honor took place. Lets you easily input honors for a constituent based on a customized list of possible honors. Lets you create an ordered listing of aliyahs and honors for a given service, for the program book, through the internal and external merge tool or through reports. Lets you easily identify a group of people and send them a letter asking them to perform a particular honor, using internal and external mail merge functionality. Lets you track responses for those invited to perform a particular honor.

## Online Event and School Registration

- **Registration and Payment:** Lets constituents RSVP online for a free event, which is then captured in the database. Lets constituents register and pay online for an event or class, which is then captured in the database and the accounting information.
- **Multiple Registration:** Lets a front-end user register other household members for an event or class without logging in as someone else, and recognizes the other household members based on a login.
- **Backend Event Setup:** Lets you easily create an online registration or RSVP form for a new event or class. Lets you set various event registration fees for a single event (e.g., adult/child or member/nonmember).

- **Confirmation and Reminder Emails:** Lets constituents automatically receive a confirmation email with customizable text when they register online. Lets you send reminders of events participants have registered for.
- **Custom Fields:** Lets you include substantial custom fields (meal preferences, interests, seating requests) on an online registration form that are then easily viewable as a summary of event attendee information.
- **Mobile Registration:** Lets constituents sign up and pay for events from a smartphone or tablet, with mobile-optimized design.
- **Waitlist/Full Event:** Lets you define the maximum number of people that can attend an event, and the online system will stop taking registrations with no waitlist when the max is reached.
- **Autofill:** Lets you auto populate online registration forms with constituent information (demographics, family members) if you are signed in.
- **Calendaring:** Lets you automatically update an internal calendar when scheduling events through the system.

### Observances and Gift Exchanges

- **Anniversaries and Birthdays:** Lets you easily create a list of all people with anniversaries or birthdays in a particular month (for Leagrams).
- **Gift Messages:** Lets you track personal messages for gifts if you add custom fields on the gift record.
- **Batch Entry:** Lets you batch enter tributes in support of physical gifts.
- **Gift Acknowledgement and Delivery:** Lets you print a letter that provides all the names and messages of those who supported an individual Leagram or Purim basket if you associate them with a specific activity. Lets you create a list of who should receive what size gift basket and at what address, if you configure the system to track this information.

### Yahrzeits

- **Hebrew Calendar Functionality:** Lets you track dates on a Hebrew calendar.
- **Hebrew Language Functionality:** Lets you track words or names in Hebrew, with Hebrew letters.
- **Yahrzeit Constituent Tracking:** Lets you track the individual constituents who should be notified (i.e., surviving family members) of each particular Yahrzeit. Lets you view all the Yahrzeits that a particular constituent should be notified about.
- **Yahrzeit Notification:** Lets you easily generate letters notifying family members about an upcoming Yahrzeit through both internal and external mail merge.
- **Gregorian or Hebrew Tracking:** Lets you track whether a particular person's Yahrzeit should be observed based on the Gregorian or Hebrew calendar. Lets you autofill a Hebrew date of death based on a Gregorian date.
- **Yahrzeit Listing:** Lets you easily create a list of all Yahrzeits that will be observed in a particular time frame (based on the desired observance timeframe/calendar).
- **Specific Yahrzeit Info:** Lets you track specific information about a Yahrzeit: Is there a plaque? Hebrew name? How do you pronounce the name? Did they die during the day or evening? Yahrzeits are also linked to deceased constituents within the system, as well as cemetery plots if applicable.
- **Online Yahrzeit Info:** Lets those with a login enter information online about Yahrzeits they'd like to be observed.
- **Yahrzeit Plaques:** It's not possible to automatically turn on the physical lights for the appropriate plaques for the week's Yahrzeits, although the vendor reports a willingness to customize this functionality.

### Donation Tracking

- **Individual vs. Family vs. Organization:** Does not let you track whether a gift was given by a whole family unit or an individual within it. Lets you associate gifts with an organization as opposed to individuals.
- **Quick Entry:** Lets you enter a number of gifts at one time through a streamlined quick-entry interface.

- **Tributes:** Lets you easily enter tribute gifts, with both the donor and the person honored. Lets you track who has donated for a particular event and in support of what other family unit (for Leagrams, Purim baskets).
- **Multiple Campaigns:** Lets you assign gifts to a particular source, campaign, or fund. A staffer may manually split them across a multiple of these.
- **LYBUNT, SYBUNT:** Lets you easily see who gave to a particular campaign last year or at another time, in order to target them again this year.
- **Pledges:** Lets you enter pledges for future gifts, including the amount and scheduled date. This is then handled as an invoice and consolidated into statements.
- **Last Donation:** Lets you see the date and amount of a constituent's last donation through the Invoices functionality.
- **Recurring Donation:** Lets a back-end or a front-end user set up a recurring donation (e.g., \$10 per month to the Rabbi's discretionary fund).
- **Checkoff Contributions:** Lets you automatically add a line item on invoices for constituents opting in for a "checkoff contribution," alongside their membership fee, which will go to a separate GL account code.
- **Grant Management:** Lets you track and manage grants being sought through the Invoices functionality. Grants are a specific Invoice Record Type, with associated stages.

### Overall Online Interactions

- **Payment Codes:** Lets you automatically pass online payment data to the system with the proper accounting codes, which can then be exported to a GL system.
- **Online Profile:** Lets constituents view their own profile online and update their contact information. Lets constituents update information online about their children (names, birthdates, schools). Lets constituents update their own online profile of interests, skills, and occupation. Lets constituents unsubscribe from email lists in the online profile. A staffer can opt-in to receive an email notification when a constituent updates their profile, or a weekly or daily digest.
- **Online Surveys:** Lets you conduct online surveys through the FormAssembly functionality.
- **Mobile:** Optimized for a smartphone or a tablet on front or back end with a native HTML5 mobile interface.
- **CMS:** Can integrate with a synagogue's website through the iFrames to emulate the look and feel in online forms. The member portal is hosted by the vendor.

### Facility and Staff Scheduling

- **Calendaring for Space Rentals:** It's not possible to view what spaces are booked and which are available in a calendar format, or who has booked which space, although the vendor reports a willingness to customize this functionality.
- **Calendaring for Rabbi and Cantor:** Lets you see and manage a Rabbi's or Cantor's calendar.
- **Billing for Space Rentals:** Lets you bill for the booking of space.
- **Contract and Deposit Tracking for Space Rentals:** Lets you track contracts and deposits for the booking of a space.

### Access and Security

- **Remote Access:** The system is web-based so you can access it remotely.
- **Data Access:** Lets you create and enforce access to different types of data for different staff users.
- **Constituent Access:** Lets you create and enforce access to different types of constituents for different staff users.
- **Personalized View:** Lets multiple staff people each see a personalized view of the tasks and data that apply to them. Lets staffers customize their own dashboards.

## Email

- **Sending Broadcast:** It's possible to send broadcast emails directly from the database without an external app, but this has limitations in terms of number of emails sent per day and spam issues. Broadcast email apps that integrate with the system include Vertical Response, MailChimp, Exact Target, iContact, and MyEmma.
- **Opt-out:** Lets you easily generate a list of members for whom there's no email address (e.g., to target them by mail instead).
- **Unsubscribe:** It's not possible to use the system to subscribe and unsubscribe constituents from all or particular lists without an external app, like Vertical Response, MailChimp, Exact Target, iContact, and MyEmma.
- **Graphic Templates:** It's not possible to use graphic templates to send broadcast emails without an external app, like Vertical Response, MailChimp, Exact Target, iContact, and MyEmma.
- **Statistics:** It's not possible to see information about email opens and click-throughs without an external app, like Vertical Response, MailChimp, Exact Target, iContact, and MyEmma.
- **Forwarding:** It's not possible for constituents to forward emails to friends and still track the email statistics without an external app, like Vertical Response, MailChimp, Exact Target, iContact, and MyEmma.
- **Discussion Lists:** Lets you create discussion groups for particular subsets of constituents (e.g., committees, those in a particular class) using the Chatter feature.
- **Statements:** Lets you send out invoices and statements via email rather than mail without an external app, but you are limited to 500 messages per day. The system also uses the internal and external merge functionality to merge data.

## Direct Mail

- **Labels:** Lets you generate labels for an ad hoc query of constituents using internal and external merge functionality.
- **Templates:** Lets you create flexible templates to receive mail-merged data using internal and external merge functionality. Lets you easily mail-merge information for a selected group of constituents into a defined template using internal and external merge functionality.
- **Response Tracking:** Lets you track the response to a particular email or direct mail campaign through the Outreach module.
- **Acknowledgements:** Lets you send out thank you letters and labels using the internal and external merge tool.
- **Tax Letters:** Lets you easily create year-end tax letters that summarize all tax-deductible donations for each constituent using the internal and external merge functionality. Constituents can also download this information from their portal.
- **Publication Management:** You can use the system to manage mailing of physical publications such as newsletters through mailing lists and subscription groups.

## Accounting Integration

- **Accounting Overview:** Lets you easily export data for any standard accounting systems through the general ledger batch module.
- **Billed Revenue:** You can't automatically pass billed revenue data to standard accounting systems without an external application like Scribe, although there is a general ledger batch module.
- **Received Revenue:** You can't automatically pass received revenue data to standard accounting systems without an external application like Scribe, although there is a general ledger batch module.
- **Batches:** Lets you create and track accounting batches in order to ease the reconciliation process with an accounting system or batch and transfer payments received online into the accounting system. It's not possible to link a batch to a deposit slip number to tie it back to the accounting system or batch and transfer payments received online into the accounting system without an external application like Scribe.

## Customization

- **Concealing Functionality:** Lets temples opt to hide pieces of functionality that don't apply to them.
- **Dropdowns:** Lets you customize dropdown values for fields such as campaigns, type of relationships, and others.
- **Custom Fields:** Lets you add up to 500 custom fields per "object" (module), which can be placed on most screens in the system.
- **Renaming/Deleting Fields:** Lets you rename or delete existing fields.
- **Customization Process:** The system is extensively customizable by the vendor and any qualified person who knows the programming language Apex, including a variety of consultants.
- **API:** Lets you access the source code or access an extensive API in order to update or add functionality. In addition, the App Exchange offers a plethora of options.

## Invoicing and Payments

- **Payment Plan:** Lets you define a payment plan by entering a start date, end date, and number of payments, and the payments themselves will be automatically calculated.
- **One-offs:** Lets you create a one-off invoice for a single payment with a template.
- **Viewing Invoices and Payment History:** Lets you view a list of all invoices for a constituent. Lets you easily see the payment history for a constituent.
- **What's Been Invoiced For:** Lets you view which payments have been invoiced and which have not.
- **Aging Report:** Lets you run a built-in aging report, which includes a summary of overdue payments with information about how overdue they are.
- **Other Invoicing:** Lets you collect standard payment info: date, amount, payment types that are configurable, check number, etc. Lets you define how much of an applied payment is tax-deductible vs. non-deductible. Lets you write off an invoice as unreceivable.
- **Payment Without Invoicing:** Lets you apply a payment for any specific event/service to a constituent record without first creating an invoice in the system.
- **Group Invoicing:** Lets you create an invoice for a specific event/service for everyone that meets a particular set of criteria (e.g., all members).
- **Tax/Nontaxable:** It's possible to apply taxable and nontaxable amounts to a single invoice by indicating what contribution types are taxable and nontaxable.
- **Constituents Paying For Others:** Lets you apply payment from one constituent to pay another's invoice and indicate on recipient's billing page that a payment was made.
- **All Open Invoices:** Lets you see all open invoices and filter by key information (member/nonmember, amount, event).

## Usability, Support, and Documentation

- **Ease of Use Overview:** The system is designed to be free of clutter, but requires training in order to navigate the interface.
- **IT Skills:** It's possible to run the database without Salesforce skills, and to consult the vendor for help and customer support. Customer support is built in to the Cloud for Synagogues subscription fee.
- **Help:** Lets you access online help to help staff understand how to use the system.
- **Training:** The vendor offers both remote and on-site training options.
- **Workflows:** Lets experts use the system to quickly do common tasks, tailored to their own workflow.
- **Process Documentation:** Lets you add process documentation to help staff understand how they're supposed to enter data and aid consistency through attachments on records, and through customization of fields during the implementation process.

## Religious School Tracking

- **Child Info:** Lets you track emergency contact information, doctor, and insurance information for each enrolled child through custom fields. Lets you track information like allergies, diet needs, and special needs for each enrolled child through custom fields.
- **Class Info:** Lets you print out a class list with key student information for teachers. Lets you assign children to particular classrooms or teachers. Lets you track the current grade level of a child, both in day school and religious school.
- **Class Promotion:** You must manually promote all children to the next grade level at the end of the year in order to hold some back, although the vendor reports a willingness to customize this functionality.
- **Attendance:** Lets you track children's attendance at religious school.
- **Grading:** No grading.

## Cemetery Management

- **Billing and Invoicing:** Lets a back-office user bill someone for a specific plot.
- **Plot Management:** Lets you track plots through a graphical map.
- **Yahrzeits and Cemeteries:** Lets you associate an individual Yahrzeit with a cemetery plot.
- **Constituents and Cemeteries:** Lets you associate the deceased person's cemetery plot with people in the database.
- **Digital Map:** Lets you view a digital map to see allocated and unallocated plots.
- **Plaque Management:** It's possible to track if there's a memorial plaque associated with a plot through custom fields.

## Reporting and Querying

- **Standard Reports:** Lets you view a set of standard reports that account for typical synagogue needs (for instance, parents with kids in preschool, parents of kids in 6th grade, LYBUNT and SYBUNT reports, constituents with a particular set of skills or interests, who came to event X but not Y).
- **Ad Hoc Reports:** Lets you easily create ad hoc reports that allow staff to define what rows, columns, formulas, and formats are used.
- **Querying:** Lets you query for a set of constituents who meet criteria for a standard set of fields.
- **Reporting for Data Issues:** Lets you identify possible data issues (e.g., duplicates, inconsistent data entry) from reports provided by the system.
- **Dashboards:** Lets you easily view and customize a dashboard that helps you track overall metrics about programs and finances.
- **Excel:** Lets you export a report or query to a friendly Excel file.
- **Searching:** Lets you quickly do a full text search of the database from anywhere in the interface.

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# SHULCLOUD

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ShulCloud is a more affordable option on the synagogue management software market that lacks some of the more sophisticated workflows and features offered by peer systems. The software is entirely web-based and has capable member management and billing capabilities, as well as a content management system to help manage your entire website. It also provides support for donations, event management, and broadcast email and direct mail. Developed by a synagogue for its own use, the system is cloud-based, so it doesn't require any special hardware or a server to implement. The premium tier, which most synagogues choose to implement, costs \$2,400 a year.

ShulCloud is an affordable web-based package relatively new to the synagogue management market, counting about 200 clients since debuting in 2011. The system provides comprehensive individual member and family unit dashboards that allow you to easily find information on a member or add new ones. Member contact info can be downloaded to the address book of a mobile device through vCards, which is a nice touch. You can't customize the information included in the member and household dashboards yourself, but ShulCloud staff can customize displays and fields for you at no additional cost. ShulCloud also serves as your synagogue's web Content Management System (CMS), and includes a dozen templates for the public website. If you don't already use a widely used CMS for your synagogue's website, like Drupal or WordPress, this could be a helpful feature.

ShulCloud has a billing and invoicing module that allows for integration with QuickBooks. It can handle gifts and member dues, but grants are not accommodated. ShulCloud now lets you track tribute gifts from one member in honor of another with the gift information represented in their member accounts. Correspondence helps with scheduling or billing needs—for instance, generating a cover letter to an invoice, which is then exported to a PDF. The querying and reporting features seem powerful, and the user can easily call up all sorts of graphic reports to represent a synagogue's financial data. Broadcast emails are also straightforward to generate, and emailed invoices include a quick link to pay a balance online without system login required. Unfortunately, it's difficult to preview a batch of merged messages and letters before they are exported to PDF.

The outward-facing member portal is smart and dynamic and includes functionality to allow members to edit their own information, and ShulCloud's creators have done some innovative work with calendaring. The software's calendaring tool automatically calculates the *zmanim*, or Halachic times, based on time zone settings entered during the setup phase, which could be a timesaver for Orthodox and Conservative congregations. Events are also easy to manage, although the system lacks more sophisticated features, like allowing family units to register other members in their household by recognizing a login. ShulCloud lets you create a dedicated webpage with information about special events, customizable by the user. Yahrzeits can be tracked against both the Gregorian and Jewish calendars.

ShulCloud now has basic support for schools, and a shared module called Seats/Cemetery to support both seats for the high holidays and cemetery management, which is a bit confusing. As for security measures, ShulCloud reports over 30 different sets of admin permissions, broken down by each module.

The system is entirely browser-based and doesn't require any special hardware or a server to implement, just an internet connection. It's optimized for search engines and for mobile devices, both on the administrative and public-facing levels. The design requires some clicking around and understanding of the system's internal architecture to navigate. Pricing options include two lower-cost options and a Premium tier at about \$2,400 a year, which most synagogues choose to implement, with discounts available for smaller synagogues and a two-week free trial included. There's no contract required, but if you commit to a year up front, there is a discount for the annual fee.

## Family Units and Households

- **Family Unit Summary:** Lets you easily see in one place all individuals associated with a particular family unit, including kids and any other household members.
- **Family Unit Details:** Lets you track main address, contact information, and membership status for a family unit on a separate address tab.
- **Same Name Tracking:** Lets you track multiple family units with the same first and last name, but you have to look at the address tab or other defining information in order to distinguish between them. The vendor suggested altering the account display name with a code or signifier to differentiate between families, or clicking on the “People” tab to see who is in the family unit.
- **Deceased Household Members:** Lets you mark and easily print out mailing labels with the deceased member excluded, if an individual is marked as deceased. You need to separately enter a Yahrzeit for the person in question.
- **Member Status:** Lets you mark that a family unit has resigned, has been suspended, or is no longer active.
- **Alumni Members:** Lets you track an “alumni”—someone who is no longer a member but was—by creating a status. However, if the rest of the family are still members, you would need to separate that individual from the rest of the family unit to represent this.
- **Divorce and Alternative Family Scenarios:** Lets you move existing contacts with all their relationships into a new or existing family unit. Lets you associate a child with two family units. Lets you account for nontraditional families (i.e., long-term non-married couples, same-sex marriages, mixed-faith marriages). ShulCloud comes with some common relationship types built-in, and a synagogue staffer could create additional relationships as needed.
- **Multiple Addresses:** Lets you track seasonal addresses for a family unit, including start and end dates.

## Basic Constituent Tracking

- **Activity and Attendance:** It’s not possible to quickly see all the recent activity for an individual associated with a family unit, such as event attendance, donations, and correspondence, in one screen. This information is divided by tabs that you need to click between.
- **Relationship Tracking Outside Households:** Lets you track and customize non-family relationships between individuals in the database.
- **Member/Nonmember Tracking:** Lets you enter any individual into the database, even if not a member, and exclude nonmembers from member datasets, through account types.
- **Demographic Tracking:** Lets you track and customize basic demographic information, such as email, phone number, birthday, age, and gender, of every constituent.
- **Faith and Observance Tracking:** It’s possible to track what tradition or movement an individual was raised in, how kosher they keep, if they’ve been to Israel, whether an individual is Jewish (in a mixed-marriage household), and other faith and observance information by creating multiple tags to represent this information.
- **Occupation Tracking:** Lets you track the occupation and organization of all adults in the household, but not their job history. The organization itself is not a record, so you cannot see if two people in the system work at the same organization unless you export the data.
- **Volunteer Matching:** It’s possible to track an individual’s interests and skills through tags to match them with potential volunteer opportunities.
- **Full Name Tracking:** Lets you track the full name for each constituent in a household to account for spouses or kids with different last names.
- **Constituent Source:** It’s possible to manually associate the source of a constituent with a campaign, an event, or a staff member through creating multiple tags to represent each campaign, event, or staff member.
- **Social Media:** Lets you link to constituents’ social media pages within their record by capturing the URL of their profiles.

- **Group and Committee Tracking:** It's possible to see who in a household is a member of a group, committee, or auxiliary, and to see everyone who's in that group if you track them through tags. That group could use a calendar to track their activities, but only staffers with the highest security level would be able to see it.
- **Batch Constituent Entry:** It's not possible for a staff member to add or import basic information about a number of constituents at once.
- **Children:** Lets you track and automatically calculate a child's age through built-in fields. College and day school enrollment can be represented through tags.

### Relationship Tracking

- **Communications Tracking:** It's not possible to see a quick summary of all recent communications and constituent actions in one place, such as phone calls, personal meetings, and a record of all system-generated letters and emails for each constituent. To see system-generated emails, you need to click on the "Communications" tab, and for all other interactions (manually entered that require follow-up) you click on the "CRM" tab.
- **Duplicate Tracking:** Lets you merge two records if it becomes apparent that those records are duplicates with a "merge" link in the record.
- **Prospecting Workflow for Constituents:** Lets you assign a priority, a stage, and a next action to a constituent to manage a prospecting workflow using the Follow-Up feature.
- **Prospecting Workflow for Organizations:** There's no clear way to assign a priority and a stage to an organization to manage a prospecting workflow.
- **Autoremindes:** Lets you create a reminder for yourself or other staff for a particular constituent, task, and date and show it prominently at that time through the Follow-Up functionality, which has an icon that prompts you to do so, but it doesn't differentiate between priority.
- **Clergy Interactions:** It's possible to track who has had recent interactions with a clergy member (to be able to find those who haven't) by using filters in the CRM section of the system and filtering by the specific clergy member.
- **Pastoral Care:** It's possible to track when a member is in the hospital or homebound by creating tags to represent the housebound, ill, or hospitalized and manually adding them. The system integrates with Hineynu tracker.
- **Buddy System:** It's possible to conduct a buddy system program, where new members are paired up with an existing member, by configuring a "Relationship" type of "Buddy" and associating the two.

### Membership Tracking

- **Member Payments:** Lets you associate payments for events and membership dues with family units for billing purposes.
- **Membership Types:** Lets you track the membership type for a family unit (i.e., single, family, senior, etc.), and you can customize the types.
- **Membership Benefits:** Lets you associate membership prices with desired seating for the high holidays or other benefits, and bill for them through the Seats/Cemetery module.
- **New Member Signup:** There is a quick-add process to enter new members, but no batch entry.
- **Batch Invoicing:** Lets you automatically generate invoices for a new cycle of membership dues in batch for all members.
- **Outstanding Payments:** It's not possible to see who has paid outstanding membership dues or event fees and who has not unless you run a query.
- **Member Fee Discounts:** Lets you define a discounted membership fee for a particular family member, which is then billed accordingly, and the discounted amount is tracked through a notes field on the "financial" section of the family unit profile.
- **Online Payments:** Lets you collect payments online through PayPal, Authorize.net, or Payaway.
- **Online New Member Signup:** Lets a new member enter initial information online for a membership, which must then be approved by an administrator.

## Event Management

- **Event Seating (High Holidays):** Lets you book and bill seat purchases, for general admission to specific areas, with member and nonmember prices, through the Seats/Cemetery module.
- **Online Registration:** Lets people RSVP for the events online for general admission, with member and nonmember prices, but has no waitlist management.
- **Seat Map:** It's not possible to see a map of what seats are occupied and by whom.
- **RSVPs:** Lets you log, view, and print a list of who has RSVP'd or registered for a particular event through a checkbox.
- **Historical Event Attendance:** Lets you see what constituents came to which event on their constituent record page by clicking on the "Events" tab.
- **Batch Event Importing:** It's not possible for a staff user to add or import basic information about a list of event attendees.
- **Honor Tracking:** Lets you track who served as aliyahs or other honors in the past, with what specifically they did on what date, through built-in fields. Lets you track the Hebrew date that an honor took place. Lets you easily identify a group of people and send them a letter asking them to perform a particular honor. It's not clear how to create an ordered listing of aliyahs and honors for a given service, for the program book. Lets you track responses for those invited to perform a particular honor using an "enrollment" widget.

## Online Event and School Registration

- **Registration and Payment:** Lets constituents RSVP online for a free event, which is then captured in the database. Lets constituents register and pay online for an event or class, which is then captured in the database and the accounting information.
- **Multiple Registration:** It's not possible for household members to easily register other individuals in their household for an event or class.
- **Backend Event Setup:** Lets you create an online registration or RSVP form for a new event or class, although you need to remember to show it on the home page. Lets you set various event registration fees for a single event (e.g., adult/child or member/nonmember) by creating a "custom tier."
- **Confirmation and Reminder Emails:** Lets constituents automatically receive a confirmation email with default text when they register online if you build a form. Lets you send reminders of events participants who have registered for the event through the Mail module. You can also send emails to those registered and not registered as well as those who attended.
- **Custom Fields:** Lets you include custom fields in an online registration form, which are then segregated from the rest of the event information.
- **Mobile Registration:** Lets constituents sign up and pay for events from a smartphone or tablet, with mobile-optimized design, although it redirects you to PayPal or Payaway if you use those payment processors. If you use Authorize.net, you are not redirected.
- **Waitlist/Full Event:** Lets you define the maximum number of people that can attend an event, and the online system will stop taking registrations with no waitlist when the max is reached.
- **Autofill:** It's not possible to auto populate online registration forms with constituent information (demographics, family members) if the constituent is logged in.
- **Calendaring:** Lets you automatically update an internal calendar when scheduling events through the system.

## Observances and Gift Exchanges

- **Anniversaries and Birthdays:** Lets you easily create a list of all people with anniversaries or birthdays in a particular month (for Leagrams).
- **Gift Messages:** It's not possible to track personal messages for gift baskets.

- **Batch Entry:** It's not possible to batch enter tributes in support of physical gifts.
- **Gift Acknowledgement and Delivery:** Lets you print a letter that provides all the names and messages of those who supported an individual Leagram or Purim basket if you associate them with a specific activity. It's not possible to create a list of who should receive what size gift basket and at what address.

## Yahrzeits

- **Hebrew Calendar Functionality:** Lets you track dates on a Hebrew calendar.
- **Hebrew Language Functionality:** Lets you track words or names in Hebrew, with Hebrew letters.
- **Yahrzeit Constituent Tracking:** Lets you track the individual constituents who should be notified (i.e., surviving family members) of each particular Yahrzeit. Lets you view all the Yahrzeits that a particular constituent should be notified about, in both the Gregorian and Hebrew calendars.
- **Yahrzeit Notification:** Lets you generate letters notifying family members about an upcoming Yahrzeit
- **Gregorian or Hebrew Tracking:** Lets you track whether a particular person's Yahrzeit should be observed based on the Gregorian or Hebrew calendar. Lets you autofill a Hebrew date of death based on a Gregorian date.
- **Yahrzeit Listing:** Lets you create a list of all Yahrzeits that will be observed in the Gregorian calendar.
- **Specific Yahrzeit Info:** Lets you track specific information about a Yahrzeit: Is there a plaque? Hebrew name? How do you pronounce the name? Did they die during the day or evening?
- **Online Yahrzeit Info:** Lets those with a login enter information online about Yahrzeits they'd like to be observed.
- **Yahrzeit Plaques:** It's not possible to automatically turn on the physical lights for the appropriate plaques for the week's Yahrzeits, but you can configure the system to do a slideshow with a TV connected to the internet.

## Donation Tracking

- **Individual vs. Family vs. Organization:** Lets you track whether a gift was given by a whole family unit or an individual within it, although the vendor needs to turn on this feature. Lets you associate gifts with an organization as opposed to individuals as long as the organization has an account in the system.
- **Quick Entry:** It's not possible to quickly enter a number of gifts at one time through a streamlined quick-entry interface.
- **Tributes:** Lets you easily enter tribute gifts, with both the donor and the person honored. Lets you track who has donated for a particular event and in support of what other family unit (for Leagrams, Purim baskets).
- **Multiple Campaigns:** Lets you assign gifts to a particular source, campaign, or fund. A staffer may manually split them across a multiple of these.
- **LYBUNT, SYBUNT:** Lets you see who gave to a particular campaign last year or at another time, in order to target them again this year through the Mail module and configuring a contribution mailing.
- **Pledges:** Lets you enter pledges for future gifts, including the amount. This is then handled as an invoice and consolidated into statements. You can edit each payment, and it doesn't show overdue pledges other than marking them as unpaid.
- **Last Donation:** Lets you see the date and amount of a constituent's last donation.
- **Recurring Donation:** Lets a back-end or a front-end user set up a recurring donation (e.g., \$10 per month to the Rabbi's discretionary fund).
- **Checkoff Contributions:** Lets you automatically add a line item on invoices for constituents opting in for a "checkoff contribution," alongside their membership fee, which will go to a separate GL account code.
- **Grant Management:** It's not possible to track and manage grants.

## Overall Online Interactions

- **Payment Codes:** Lets you automatically pass online payment data to the system, and eventually to accounting, coded as to what the payment was for.
- **Online Profile:** Lets constituents view their own profile online and update their contact information. Lets constituents update information online about their children (names, birthdates, schools). Constituents can unsubscribe from all email lists except for billing emails (although they can opt into paper mail) in the online profile. Staffers can see these changes in the audit log.
- **Online Surveys:** Lets you conduct online surveys through the form system.
- **Mobile:** Optimized for a smartphone or a tablet on front or back end.
- **CMS:** Provides management of a synagogue's website through a built-in CMS. The system does not integrate with external CMSs like Drupal or Wordpress.

## Facility and Staff Scheduling

- **Calendaring for Space Rentals:** Lets you view what spaces are booked and which are available in a calendar format, but not who has booked which space.
- **Calendaring for Rabbi and Cantor:** It's possible to see and manage a Rabbi's or Cantor's calendar by creating a calendar type of "Rabbi" and limiting access to that calendar by tag.
- **Billing for Space Rentals:** Lets you manually create a billing for the booking of space.
- **Contract and Deposit Tracking for Space Rentals:** It's not clear how to track whether a contract or deposit has been received for a rental.

## Access and Security

- **Remote Access:** The system is web-based so you can access it remotely.
- **Data Access:** Lets you create and enforce access to different types of data for different staff users.
- **Constituent Access:** It's not possible to create and enforce access to different types of constituents for different staff users.
- **Personalized View:** Lets multiple staff people each see a personalized view of the tasks and data that apply to them. Staffers cannot customize their own dashboards.

## Email

- **Sending Broadcast:** Lets you send broadcast emails directly from the database without an external app, through the Mail module.
- **Opt-out:** Lets you easily generate a list of members for whom there's no email address (e.g., to target them by mail instead).
- **Unsubscribe:** Lets you use the system to subscribe and unsubscribe constituents from all or particular lists.
- **Graphic Templates:** Lets you use graphic templates to send broadcast emails.
- **Statistics:** Lets you see open rate, bounce rate on per-email basis, or a particular campaign, as well as for all emails, but not for a segment.
- **Forwarding:** It's not possible for constituents to forward emails to friends and still track the email statistics.
- **Discussion Lists:** It's not possible to create email discussion lists for particular subsets of constituents.
- **Statements:** Lets you send out invoices and statements through email.

## Direct Mail

- **Labels:** Lets you generate labels for an ad hoc query of constituents. You use the Message module to do so. You are limited to two label sizes, and you cannot preview or edit the labels.
- **Templates:** Lets you create flexible templates to receive mail-merged data, but you cannot preview them before merging them. Lets you mail-merge information for a selected group of constituents into a defined template, and

the system uses tokens with help tips that explain what they represent.

- **Response Tracking:** It's not possible to track the response to a particular email or direct mail campaign.
- **Acknowledgements:** Lets you create a one-off thank you letter, but not a label for a donation from a constituent record screen, by choosing "Modify and Save Pdf." Lets you create one-off tribute gift letters, which print a letter and label for both the donor and the person honored, although the person is referred to as in the "Last Name, First Name" account name format within the letter. It's not possible to queue thank you letters in order to print out a batch of letters and labels at one time. It's not possible to queue one-off tribute gift letters, to print a whole series of letters for both the donors and the people honored.
- **Tax Letters:** Lets you easily create year-end tax letters that summarize all tax-deductible donations, for each constituent, but constituents cannot download this information themselves.
- **Publication Management:** You can use the system to manage mailing of physical publications such as newsletters through tags.

### Accounting Integration

- **Accounting Overview:** Lets you easily pass data to the standard accounting system QuickBooks.
- **Billed Revenue:** Lets you automatically pass billed revenue data to QuickBooks.
- **Received Revenue:** Lets you automatically pass received revenue data to QuickBooks.
- **Batches:** Lets you set up the types of transactions that should be batched into each account code for the accounting system. Lets you create and track accounting batches in order to ease the reconciliation process with an accounting system. Lets you link a batch to a deposit slip number to tie it back to the accounting system.

### Customization

- **Concealing Functionality:** It's not possible to hide pieces of functionality that don't apply to your temple.
- **Dropdowns:** You can control dropdown values for information in "My Lists," but not throughout the system.
- **Custom Fields:** No custom fields.
- **Renaming/Deleting Fields:** It's not possible to rename or delete existing fields.
- **Customization Process:** The system does not have customization options available to employees of the synagogue. For most major changes to the system, the vendor would need to be contacted and can provide changes on a fee-for-service basis.
- **API:** The vendor provides read-view only of the API.

### Invoicing and Payments

- **Payment Plan:** Lets you define a payment plan by entering a start date, end date, and number of payments, and the payments themselves will be automatically calculated.
- **One-offs:** Lets you create a one-off invoice for a single payment with a template.
- **Viewing Invoices and Payment History:** Lets you view a list of all invoices for a constituent. Lets you easily see the payment history for a constituent.
- **What's Been Invoiced For:** Lets you view which payments have been invoiced and which have not.
- **Aging Report:** Lets you run a built-in aging report, which includes a summary of overdue payments with information about how overdue they are.
- **Other Invoicing:** Lets you collect standard payment info: date, amount, payment types that are configurable, check number, etc. Lets you define how much of an applied payment is tax-deductible vs. non-deductible. Lets you write off an invoice as uncollectible.
- **Payment Without Invoicing:** Lets you apply a payment for any specific event/service to a constituent record without first creating an invoice in the system.
- **Group Invoicing:** Lets you create an invoice for a specific event/service for everyone that meets a particular set of

criteria (e.g., all members).

- **Tax/Nontaxable:** It's possible to apply taxable and nontaxable amounts to a single invoice by indicating what contribution types are taxable and nontaxable.
- **Constituents Paying For Others:** Lets you apply payment from one constituent to pay another's invoice.
- **All Open Invoices:** Lets you see all open invoices and filter by key information (member/nonmember, amount, event), but you need to build a query to do so.

### Usability, Support, and Documentation

- **Ease of Use Overview:** The system doesn't always use the most intuitive names for its features, requires several clicks to do common tasks, and appears cluttered. Each page has contextual help with video and step by step instructions.
- **IT Skills:** It's possible to run the database without IT skills, and to consult the vendor for help and customer support. Customer support is built in to the ShulCloud fee.
- **Help:** There are contextual help links within the system, and an online help wiki that is password protected with videos and screenshots.
- **Training:** Training is available for \$150 per hour, either online or on-site.
- **Workflows:** It's not possible to tailor the system to quickly do common tasks.
- **Process Documentation:** You can add process documentation to help staff understand how they're supposed to enter data to aid consistency by making private web pages that only staffers can see, or adding your own documentation to the help page.

### Religious School Tracking

- **Child Info:** It's possible to track and report on emergency contact information, doctor, and insurance information for each enrolled child by adding enrollment questions in the online form. It's possible to track and report on allergies, diet needs, and special needs for each enrolled child by adding enrollment questions in the online form.
- **Class Info:** Lets you print out a class list with key student information for teachers. Lets you assign children to particular classrooms or teachers. Lets you track the current grade level of a child, both in day school and religious school.
- **Class Promotion:** You must manually promote all children to the next grade level at the end of the year in order to hold some back.
- **Attendance:** It's not possible to track children's attendance at religious school.
- **Grading:** No grading.

### Cemetery Management

- **Billing and Invoicing:** Lets a back-office user bill someone for a specific plot.
- **Plot Management:** Lets you view which plots are sold and which are unsold through the Seats/Cemetery module. Lets you view who in the database has reserved a plot and who has not, in order to market plots. Lets you track who is buried in each plot number in a cemetery. Lets you view what section and/or plot a particular constituent has reserved.
- **Yahrzeits and Cemeteries:** Lets you associate an individual Yahrzeit with a cemetery plot.
- **Constituents and Cemeteries:** Lets you associate the deceased person's cemetery plot with people in the database.
- **Digital Map:** It's not possible to view a digital map to see allocated and unallocated plots.

- **Plaque Management:** Lets you track if there's a memorial plaque associated with a plot.

## Reporting and Querying

- **Standard Reports:** The system does not let you view a set of standard reports that account for typical synagogue needs (for instance, parents with kids in preschool, parents of kids in 6th grade, LYBUNT and SYBUNT reports, constituents with a particular set of skills or interests, who came to event X but not Y).
- **Ad Hoc Reports:** Lets you create ad hoc reports that allow staff to define what rows, columns, formulas, and formats are used.
- **Querying:** The query-building process for a set of constituents who meet criteria for a standard set of fields is complicated.
- **Reporting for Data Issues:** There are no standard reports in the system to identify possible data issues (e.g., duplicates, inconsistent data entry).
- **Dashboards:** There aren't useful dashboards that help you track overall metrics about programs and finances.
- **Excel:** Lets you export a report or query to a friendly Excel file.
- **Searching:** It's not possible to quickly do a full text search of the database from anywhere in the interface.

# HOW DO THESE SYSTEMS COMPARE? (2014)

For information on how we rated the systems, please see Appendix B: How We Rated the Systems in the original *Guide to Synagogue Management* released in January 2013.

	Cloud for Synagogues	ShulCloud
Family Units and Households	●	○
Basic Constituent and Relationship Tracking	●	◎
Member Management and Dues Renewal	●	●
Event, Honor, and High Holy Day Management	●	○
Yahrzeits	●	○
Donation Tracking	●	○
Observances and Gift Exchanges	●	○
Email and Direct Mail	●	○
Overall Online Constituent Interactions	●	○
Facility Management and Staff Scheduling	○	◎
Hebrew and Religious School Management	◎	◎
Cemetery Management	●	○
Access and Security	●	○
Customization	●	•
Invoicing and Payments	●	●
Reporting and Querying	●	•
Usability, Support, and Documentation	●	○
Accounting Integration	◎	●

• None ○ Fair ○ Good ● Excellent

# HOW DO THESE SYSTEMS COMPARE? (2013)

This chart is reproduced from our January 2013 *Guide to Synagogue Management: Research and Recommendations*, and has not been updated with the information reported by vendors.

	ShulSuite	CiviCRM	Salesforce NPSP - No Apps	Salesforce NPSP with Apps	Tessitura	SugarCRM	Raiser's Edge for Synagogues	Chaverware	MM2000
Family Units and Households	●	●	●	●	●	●	○	○	○
Basic Constituent and Relationship Tracking	●	●	○	●	●	○	○	○	○
Member Management and Dues Renewal	○	○	○	●	●	○	●	○	○
Event, Honor, and High Holy Day Management	●	●	○	●	●	○	○	○	○
Yahrzeits	●	•	•	•	•	•	●	●	●
Donation Tracking	●	○	○	●	○	○	●	○	○
Observances and Gift Exchanges	○	○	○	●	●	○	●	●	○
Email and Direct Mail	●	●	○	●	●	○	●	●	○
Overall Online Constituent Interactions	●	●	○	●	●	●	●	○	○
Facility Management and Staff Scheduling	○	○	○	○	○	●	○	○	○
Hebrew and Religious School Management	○	○	○	○	○	•	○	○	●
Cemetery Management	○	•	•	•	○	•	○	●	○
Access and Security	●	●	●	●	●	●	●	○	○
Customization	●	●	●	●	●	●	○	○	○
Invoicing and Payments	○	○	○	○	●	•	●	●	●
Reporting and Querying	●	●	○	○	●	●	●	○	○
Usability, Support, and Documentation	○	●	●	●	●	●	○	○	○
Accounting Integration	○	○	○	○	●	○	●	●	●

• None ○ Fair ○ Good ● Excellent

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# ABOUT IDEALWARE

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Idealware, a 501(c)(3) nonprofit, provides thoroughly researched, impartial, and accessible resources about software to help nonprofits and the philanthropic sector make smart software decisions. By synthesizing vast amounts of original research into credible and approachable information, Idealware helps organizations make the most of their time and financial resources. Visit [www.idealware.org](http://www.idealware.org) to learn more or view our hundreds of free articles, resources and reports.

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### **Chris Bernard**, *Editorial and Communication Director*

Chris is a career writer and journalist with two decades of experience in newspapers, magazines, advertising, corporate and nonprofit marketing and communications, and freelance writing. Prior to Idealware, he was managing editor of a newspaper, and for the past six years has overseen Idealware's publications, including writing and editing and maintaining the Idealware voice. In that time, he's driven the creation and publication of more than a hundred articles, reports, and other publications. Outside of his work at Idealware, he's an award-winning journalist and author, and a frequent speaker and lecturer at literary conferences and festivals around the country.