



A Guide to Synagogue Management Systems

October 2018

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INTRODUCTION

Why Does Data Matter to Synagogues?

UJA-Federation of New York and Idealware are pleased to present this update of the *Consumers Guide to Synagogue Management Systems*, which we first published in 2013. That report provided detailed reviews of a number of software packages available to help synagogues manage their congregations. This update looks at how the marketplace for systems has changed since then, and provides a high level look at the most widely used and recommended systems that make up the market today.

To create this update, we surveyed the field, talked to synagogue leaders and technical experts, and spoke with software vendors. This report distills what we learned into an accessible summary. (You can find a summary of the survey results on page 22.)

When we quote a subject matter expert, community leader, or other advisor throughout the report, those are the words of one of the many people with experience designing, selecting, implementing, and using synagogue management systems who graciously took the time to share their wisdom with us. (You can see the list of people we spoke with on page 25.)

Not all synagogues use synagogue management systems—some still rely on manual recordkeeping, QuickBooks, and/or Excel spreadsheets. If you think that you just need a system to send and receive invoices, handle accounting, and keep track of contact lists, such as addresses and phone numbers, then these systems may be sufficient.

But we believe that this limits your synagogue's capabilities, and represents a missed opportunity. A synagogue management system can help you better engage and understand the people your synagogue interacts with, both individually and collectively.

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At the individual and family levels, a purpose-built synagogue management system can help synagogue staff record engagement with the synagogue, education programs, and other related community activities; access people's personal interests and concerns; and identify professional connections. A synagogue management system can also help you connect individuals and communicate with specific groups in your synagogue. More importantly, a synagogue management system lets you bring data into the discussion about your community's future.

How many families with young children are in your congregation? How many "empty nesters?" What are attendance trends for your cultural arts series? Who are your most active volunteers? A synagogue management system can help you access and report on data that may lead to better-informed conversations and decision-making.

If you're not yet using a synagogue management system, it can be difficult to figure out where and how to get started—and if you're using one that you're not quite satisfied with, how do you go about deciding which one might better meet your needs now and in the future? We prepared this report to aggregate information and research in a single place and provide best practices about what to consider in your decision-making process. We've broken the content down into distinct sections for different readers with different needs.

This report covers how to select a system, and how to switch over to a new one. It explains the two biggest trends driving vendor changes in this current market—the Cloud, and venture capital investments. And it provides brief profiles of the main synagogue management systems on the market as of mid-2018.

Whether you're looking to implement your first synagogue management system, trying to decide on a new one, or unsure whether you need one in the first place, this report will get you started finding the answers to your questions. You'll find our contact information in the About This Report section on page 24—we welcome your comments and feedback.

Making Data Part of the Decision-Making Culture

Why collect data? Tracking the way your synagogue interacts with congregants can help you better understand and serve your community. It also allows you to compare your progress against your past experiences, and to compare your progress with other organizations who publish or share their data. By providing a clear understanding of where your organization is in terms of effectiveness and efficiency, it can help you more clearly see the things you're doing well and the areas in which you need to improve. It can also support your intuition when your gut instinct is correct, making it easier to get others on board with your ideas or decision—and it can help you see when you're wrong. In short, data can help you make a stronger argument for change—or one for staying the same.

By helping you better understand the wants, needs, and interests of your community, it can better position you to meet and provide for them. It can also help you grow your community by tailoring your program to match those needs and interests.

But it's important to note that data doesn't always mean change. It can help you identify all the things you are doing right and not just the areas in which you need to improve—it can help you make the case for continuing with the status quo by proving that what you're doing is working.

More and more organizations are turning to a data-driven decision-making model. Thanks to technology, data is easier than ever to collect and to track, and to access and report on, though doing so effectively still requires vision and planning. By using data to inform actions and decisions, synagogues can better engage members and the wider communities, and better contribute to the discussion about the formation of a collective Jewish identity.

WHAT DO SYNAGOGUE MANAGEMENT SYSTEMS DO?

Some synagogues manage their information using an accounting system, spreadsheets, or some combination of software. This may be a functional way of tracking data, but it is not an optimal way. Tracking data in a spreadsheet requires a significant amount of time to enter and re-enter information, and can make it difficult to forecast financials, access data in a timely manner, and generate reports.

Synagogue management systems are purpose-built to help manage a number of tasks relevant to synagogues, including billing, communications, contributions and donations, and relationship tracking. They can also connect to cemetery, event, financial, and school management systems, among others. Like any Customer Relationship Management system (CRM), a synagogue management system simplifies the number of places where information is tracked. It serves as the “operational spine of an organization,” said another expert, reducing the need to update information in multiple places. For example, when a person’s address changes, you update the information in one place instead of changing it in multiple spreadsheets and an accounting system.

A synagogue management system helps streamline communication. Most make it possible for members to register for upcoming events, update personal information, and make payments online. These systems also make it relatively easy to communicate with groups of people—select a group in the system, send information or invoices to them by email, and print labels to mail items to people who prefer to receive mail.

Synagogue systems also help manage financial information, which can get complicated. One expert said that a key role of a system is to manage “various third-party payments, where one person pays for

membership of various family members in periodic payments.” For example, a single check or online payment might “need to be allocated among several funds, for various descendants and/or families, along with donations.” Similarly, refunds need to be adjusted in both the financial system and the database. A synagogue management system helps track and report this information accurately.

A system also can help staff engage members. “Data can help a synagogue identify that 20 percent of members are the ones who show up at 80 percent of the events,” one expert said. “That gives you a system to start to engage inactive members.” For this to work, a system needs to be in place to identify engagement. Synagogue management systems can help professional staff and lay leaders understand more clearly the demographics of your community—how many fall into what age range, for example, or have been members for how many years; how many are single or have children living at home or are empty nesters.

Choosing to move from a very manual or basic system to one of the synagogue management systems covered in this report is a big step. From selection to implementation to training—not to mention the cost in terms of both financial and staff resources—the process can put a strain on the organization. But the end result is a synagogue that’s better able to track, communicate with, and engage community members. Our experts agree that organizations that maintain and value relationships with large communities need to use a CRM to best manage those relationships.

HOW TO SELECT A SYNAGOGUE MANAGEMENT SYSTEM

When you start to look for synagogue management systems, you'll notice that there are a limited number of vendors that offer solutions. We focus on the following six in this report:

- Chaverware
- Congregation Connect
- jManage
- MM2000
- Rakefet
- ShulCloud

Additionally, we address two general database platforms (CiviCRM and Salesforce), and look at a few other options for specific customer segments.

What are the salient differentiations among the systems that you should look out for, and how do you decide which is right for your synagogue? As with any software selection, there's no simple answer to those questions, but there is an established process that can help you narrow options and choose the best software for your needs.

The first step is to create a selection team made up of the people whose input should be included in the decision-making process. This should include people who will use the system and people whose work will be affected by it. Then, as a team, ask and try to answer the following questions about your data needs, your work patterns, and available software solutions.

Keep in mind that your needs may change over time—when selecting a system, look for one that allows room for you to grow, anticipating what you might want to do in the future as you become more comfortable and adept with your data practices. As you discuss what you want from a system, always ask what you would differently if you had additional data. For example, a system might help you identify that member engagement declines after children reach a

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certain age—a report can identify the issue, but you and your team will need to ask the questions and take action on what you've learned. Focus primarily on what you need today and what you want to track better rather than trying to find the end-all, be-all system to all possible wants and needs.

Selecting synagogue software is a group effort, not a task solely for people in either governing or staff roles, since different people may have different perceptions of the need for a system. This might also include lay leaders with relevant expertise, or others with responsibilities for similar systems.

As one expert points out, people in governing roles are “not always as close to—or aware of—staff challenges.” That can sometimes be problematic. Another expert noted that “past leaders sometimes remain in the governing structure with voting rights. That may slow the adoption of technologies if these leaders vote against newer ways to work.” And staff tend to know and understand the need for technology, but “they're often stretched thin,” says one advisor, since staff serve multiple roles. “They're a customer service team, an event team, a pastoral care team, and a fundraising team—all at once.” That's why it is important to

“have staff involved in the project—participating in selection and development from day one, to varying degrees,” said one leader.

As a team, consider the following five questions about your data needs, your work patterns, and available software solutions.

1. What do you need to track?

Remember, your primary need is the ability to collect, track, and analyze information about the people in your community. What else do you want a system to do? Ask people to identify the key data to track. For example, if you run a school, consider all the information you’d like a system to help you manage—such as registration, scheduling, communications, etc. Or maybe you manage a cemetery, or want a system that also offers a companion website management system.

Be very clear which data you absolutely must have a system track, and which features might be “nice to have.” For example, the ability to pull in a member’s social media presence may be nice to have, while an accurate and easy-to-use invoicing interface might be essential. Take a look at the specific modules that matter most to you.

While software can help you store, access, and analyze data, your data is only as good as your collection practices. Good data practices mean more than just using new software—they also involve people learning new ways of gathering and entering data and better data hygiene. As one expert suggested, “people also need to be willing to change their own behaviors.” New systems enable new ways to work, which means that everyone involved—from staff, to people in governing roles, to members—needs to be open to change. A manual registration process, for example, may likely be streamlined and simplified with a synagogue management system. The goal, always, is that the new system will manage more mundane tasks, and thereby let people spend more time engaged with other people.

New software and new practices can place new burdens on staff members. Communicating the value of the new system can go a long way toward earning “buy-in” from reluctant staff members and help ensure adoption—and proper training can further eliminate obstacles and lead to a more successful implementation.

2. What systems are similar organizations using?

Talk to colleagues at synagogues similar to yours to understand what system they use and what they like about that system. Be sure to ask about any tasks or activities that the staff would like to see improved. You’ll learn a lot simply by listening to a few people you respect talk about the system they use. Wherever possible, we encourage two people from your team to be part of this conversation, since different people may detect different things during conversations.

Give some serious thought as to whether installed software or a Cloud system meets your synagogue’s needs best. In the general CRM market, many vendors are heading to “the Cloud,” which typically means software that you access from a browser or app, but that you don’t have to install, update, or maintain on hardware in your offices. For small organizations without technical staff, a Cloud-based option often makes the most sense. For instance, a Cloud system will enable access to congregant and staff contact information that would not be available in an installed system in the event the synagogue is closed due to weather or other emergency.

You might also talk to colleagues about staff roles. As synagogue staff size increases, the need for someone on staff to serve as a technical point person also increases. One expert suggests, that “someone focused on data/reporting/systems is probably needed whenever a synagogue gets beyond 15 staff members or so.” The benefit, they continued, is that this “staff person can solve—and/or filter—as many issues as possible, then serve as a point person” for outside vendors—and as a troubleshooter for your synagogue.

3. Do you need a customized solution?

Each of the six synagogue systems mentioned in this report allows you some degree of customization. Most will allow you to modify a few data fields, create a custom report, or configure specific export options. Every synagogue should expect that level of customization. But some synagogues may want even greater flexibility.

Consider customization cautiously. “The flipside of flexibility is complexity,” one expert told us. In other words, you need to understand that you’re taking on a more technical task when you select a system that allows you to add hundreds of third-party extensions, add new data objects and modules, or even modify the core code. *Note:* If any of the words in the previous sentence are unfamiliar or beyond your technical understanding, we advise against customization.

The complexity and flexibility of systems varies. The most flexible option would be to build your own system, typically with the help of a consultant, on a platform such as Salesforce or CiviCRM. This requires technical expertise, and essentially means that your synagogue is entering the software development and/or customization business. Some large synagogues have chosen to do this, with varying degrees of success.

Consider seriously whether you have access to sufficiently technical staff, outside expertise, and can support the ongoing expense. Costs for significant customizations can easily be in the low to mid-six-figure range, though off the shelf, the cost to qualified nonprofits is generally more affordable.

A slightly less complex option would be to choose either of the two systems built on the above-mentioned platforms: Congregation Connect (which is built on Salesforce) or jManage (which is built on CiviCRM). Both of these were designed to meet most of the needs of a synagogue as configured, but both can also take

Cloud vs. Installed Systems

Traditional software systems were installed on desktop computers or an in-house server. This meant that every vendor update or customization needed to be shipped on new disks, or as a download, and installed. Troubleshooting meant vendor visits, and someone needed to take responsibility for backing up files.

Cloud-based systems are hosted by the vendors or a third party, and accessed via a browser or mobile app. You’ll need a reliable internet connection, but the vendor handles all updates and troubleshooting, ensuring customers have access to the latest and most stable versions, and also provides security and backup services. An additional benefit is that your data is accessible from anywhere, meaning you’re no longer limited to a desktop.

Which is right for you? The software market is moving to the Cloud—not just for synagogue management systems or CRMs in general, but for everything from office and productivity tools to case and client management solutions. In most cases, the benefits outweigh any disadvantages, but increasingly, vendors are making the choice for you by only providing Cloud-based systems.

advantage of third-party tools developed by other vendors to work with the underlying systems. Third-party tools typically allow two cloud-based applications to work together. They typically include forms, SMS services, email services, mapping tools, and payment processors, among many others. Again, in both cases, we would suggest that this added flexibility merits having someone on staff with sufficient knowledge to help you get the most out of the system.

4. What will the impact of this solution be for your synagogue?

When considering how a new synagogue management system will affect your organization, there are a number of factors to weigh. In our experience, these are best tracked in multiple documents.

First, use a spreadsheet to identify the financial costs associated with a system, including data migration, direct costs, and recurring fees. Some vendors offer their software for a monthly fee, with no contract required. Others require a multi-year contract for the initial purchase of the core system and additional modules. Some charge an additional sum for support, while others bundle support into ongoing fees. A few vendors vary pricing based on the number of people who use the system. We've included a link to each vendor's pricing page in our product overviews. Note that data migration costs can be difficult to estimate. Contact the vendor of the system you're considering to clarify how much it will cost to move your data into the system. A small synagogue that previously relied on QuickBooks and/or Excel can likely import data into any of these systems relatively quickly. A large synagogue moving from a system that has many customizations may take more time and require more technical assistance to move data, which increases the costs.

Second, make a workflow diagram—sometimes called a process map—to identify how your most important data moves through the system. For many synagogues, this means mapping how people process membership and event payments. This flowchart makes work processes visible, so that your team can see how your new system lets you change how you work. For example, today, you might manually enter the details of a payment received from a member in both your database and your financial system. If your new system automatically syncs, you no longer need to enter data twice. Make sure to create the process map with the involvement of all staff throughout a particular workflow. (To learn more about process mapping, see *How to Document a Process* at wikiHow, <https://www.wikihow.com/Document-a-Process>.)

5. How will you transition to this new software solution?

Allow adequate time for a smooth transition to your new system. It's equally important to plan that transition to limit surprises and help ensure success. Ideally, schedule the switch during a time when the staff can allocate appropriate time to learn and adapt to the new system and processes. Many organizations prefer to switch to a new system at the start of a new fiscal year. With modern systems, you can likely just plan to switch from one system to another rather than running two systems side-by-side for a period, which one expert cautioned against, recommending instead that a synagogue “cutover cleanly from the old system to the new system” while also making sure that expert vendor support is available during the cutover process.

Remember, training is essential. You might give people access to a demo version of the new system in order to become familiar with the new system's interface and navigation, for example. Note that some vendors offer demos or limited-time system trial periods—be sure to take advantage of such offers as you consider systems. And, even if vendors don't explicitly make such an offer, you might ask the vendor to do so. Many vendors will allow access to a limited-use system for test purposes. Additional training might cover how to handle specific frequently performed tasks. Not everyone needs the same level of training. People who will use the system daily deserve time and training to learn all the details and shortcuts a system offers. Other people might only need to learn how to sign in, search for a member record, and add a note.

Make time to publicly recognize the impact of the new system. One expert recommended that leaders highlight features that please staff members as part of the switchover. This might be something as simple as the ability to access member information quickly, or a report that no longer takes hours to run, or it might be something that makes it convenient for members to update information or make payments themselves, online, without the need for staff to spend time on the phone or handle checks. In any case, plan to acknowledge the changes enabled by the system—and, more importantly, the role that each person involved in the project played to make the system a success.

MARKET TRENDS: WHAT'S DRIVING CHANGES TO THE MARKET?

Two factors seem to be driving the majority of core changes in the synagogue management market space since our last report: a drive to move systems to the Cloud, and the infusion of venture capital funding. Based on our research and experts' opinions, we think they'll continue to shape the nature of the systems available for the near future, as well.

The Cloud

In the 1980s and 1990s, synagogue software startups built for Windows; today, software makers create systems for Cloud platforms. The first wave of Cloud-first solutions arrived with Congregation Connect and jManage (formerly ShulSuite), built on Salesforce and CiviCRM, respectively. ShulCloud, started seven years ago, and ShalomCloud, started in 2017, both rely on Amazon Web Services. And ChabadSuite customizes CiviCRM to deliver Software-As-a-Service for Chabad. We would be surprised to see new systems not built on Cloud platforms.

People favor the increased convenience of systems that allow data access from anywhere.

In our 2014 update, we identified the growth of Cloud-based systems as a trend, and since then it's only grown stronger. The days of needing to install software, maintain a server, a configure remote connections carefully seem to be coming to a close as people favor the increased convenience of systems that

Remembrance of Systems Past

Four systems covered in our previous report—Raiser's Edge, Shelby, Tessitura, and Sugar-CRM—do not appear in this update. Why is that?

In a few cases, because the vendors exited the market. Typically, though these systems were marketed to synagogues, they were designed primarily for other general purposes (such as fundraising or membership management).

In other cases, our survey respondents and conversations with experts revealed that certain systems simply are no longer used. These systems tended to be either speciality systems (e.g., performing arts management or church management systems) or those built for older operating systems (e.g., MS-DOS).

As of August 2018, all of the systems included in the current report are known to our experts, used by some congregations, and actively supported by vendors.

allow people to access data from anywhere. Vendors that offer systems built for a Windows-only, installed-software world don't appear to be growing at quite the same pace as Cloud-vendors. People favor the increased convenience of systems that allow data access from anywhere.

Capital Investments

Investment capital entering the synagogue software market may signal a change as significant as the rise of Cloud platforms. In 2017, Togetherwork, a group software and payment company, purchased Chaverware and Congregation Connect. In January 2018, it

purchased Jvillage. Rob Hirsch, CEO of Chaverware LLC, now manages and operates all three of products with a team of about 20 employees. In March 2018, GI Partners, a private equity firm, purchased Togetherwork. The result is that a private equity company controls three of the products in the sector.

This kind of investment capital also likely means that the days of synagogues being able to cost effectively build their own systems are coming to a close. We expect to see large synagogues continue to hire consultants to customize Cloud-platforms (such as Salesforce or CiviCRM), as successful customizations are possible, but only congregations with the technical proficiency and funding should do so as the cost to compete is high.

Acquisitions and market consolidation can cause other challenges. If your synagogue happens to use a vendor whose product is acquired, that can cause concern.

We recommend synagogues seek vendors that communicate product plans and changes clearly, frequently, and consistently. Similarly, when selecting a system, always make sure you know how to export your data. Most vendors will help you bring your data into their system—make sure you also know how to get it out.

But investment capital in this market may mean good things, as it can give software firms the ability to improve software and services. With capital, teams may hire more support staff, increase marketing, improve testing, or build-out new features faster. Capital often allows a firm to acquire customers by buying other firms in the field. Over time, the end result can be a market with fewer, but stronger, competitors.

SYNAGOGUE MANAGEMENT SYSTEMS

In this section, we provide brief profiles of the six most commonly used systems, based on our survey results and discussions with experts. We also provide information about customized database systems (such as Salesforce and CiviCRM) and other viable alternatives.

Wherever possible, we also include information about the size of the team behind each system. We think it is helpful to understand the general scale and scope of the organization that develops and supports each systems, as it can give more data about the reliability, responsiveness, and long-term stability of an organization.

As noted in the sidebar on page 11, four systems covered in our previous report—Raiser’s Edge, Shelby, Tesitura, and SugarCRM—do not appear in this update. Similarly, while some experts were aware of synagogues using iMIS in the past, a general membership management system with synagogue-specific customizations, none of our survey respondents indicated current use. A few respondents said they use Marks, our research found that the vendor that developed that system no longer maintains an online presence.

Chaverware

chaverware.com

800-242-8371 / info@chaverware.com

Chaverware is available in installed and Cloud-based versions. Chaverware 5, the most current version available to be installed on Windows systems, helps manage detailed membership and accounts receivables information, and handles yahrzeit and graphical cemetery management workflows. An additional religious school module is offered, as well. The Cloud-hosted Chaverware 6 offers similar functionality accessible from your browser. An optional ChaverWeb module adds member portal features to either version. Both systems integrate with both QuickBooks (desktop and online versions) and Sage 50 (formerly known as Peachtree).

Customers may choose to either agree to a five-year contract for support (and make payments annually) or purchase Chaverware and technical support separately.

The lowest-cost five-year contract costs \$1,995 per year, with higher priced plans adding additional support, troubleshooting, data conversion services, and/or access to the religious school module. The one-time purchase option costs \$3,400, and includes one year of support. Whichever purchase method you choose, you’ll receive a three-concurrent user license for the system, with additional three-user license packs available for an additional fee. ChaverWeb, which adds member portal features, costs \$1.35 per family member unit per year. Pricing for Chaverware 5 and 6 is the same. (See pricing details at <https://chaverware.com/chaverware/pricing.html>.) Chaverware first became available in 1993, and as of mid-2018, serves about 550 customers. Chaverware LLC manages and operates Chaverware, Congregation Connect, and Jvillage with a team of about 20 employees.

Congregation Connect

congregationconnect.com

800-242-8371 / info@chaverware.com

Congregation Connect is built on the Salesforce.com platform, a highly customizable, multi-user, Cloud-based CRM database platform. It serves synagogues that want the CRM features found in Salesforce and the ability to customize the system with an interface intended to help people manage standard day-to-day functions. Congregation Connect works best when a synagogue has someone on staff who is familiar with Salesforce. (There are Salesforce training options available, as well.)

As with the underlying Salesforce system, the system is priced based on a specific number of named users (in other words, each person needs a license to sign in to the system). You’ll need a Salesforce license for each person. Salesforce offers up to 10 free licenses to qualified nonprofit organizations, with additional unlimited sales and service CRM licenses priced around \$325 per person per year (billed annually). Congregation Connect support packages start at \$360 per user per year, with upgrades available that offer

additional hours, additional support access, and faster response times. Other upgrades include a member portal (\$1,300 per year), unlimited forms (\$1,000 per year), and QuickBooks online integration (\$1,200 per year). (See pricing details at <http://congregationconnect.com/products/pricing>.)

Congregation Connect is used by about 50 customers, and is managed by Chaverware LLC, which operates Chaverware, Congregation Connect, and Jvillage with a team of about 20 employees. One of Chaverware's first coordinated, cross-platform development efforts resulted in the ability to integrate Congregation Connect with both QuickBooks and Sage 50. The integration uses the same system built for Chaverware 6, which connects the databases and financial systems (via APIs, application programming interfaces, a method of exchanging data directly between two systems). That's an example of how the company might expand functionality across product lines.

Jvillage

jvillagenetwork.com

877-518-5845 / shalom@jvillagenetwork.com

Jvillage includes two products: jManage, which helps manage synagogue membership; and jWeb, which helps manage websites. (Previously, jManage was known as ShulSuite.) Customers may choose to use both products together or separately. More than 100 customers currently use jManage.

Built on the powerful CiviCRM platform used by thousands of nonprofit organizations, Jvillage provides the ability to choose to customize the system with extensions. Extensions are packages that add functionality, such as connecting the system to third-party payment systems, applications, or services. As with other platform-based systems, such as Salesforce, extensive customization of the system is possible, but requires significant technical knowledge. Of course, you can use the system without such customizations.

Jvillage offers monthly subscription options based on the size of your community, along with yearly support packages. Typical costs for jManage are in the \$2,500 to \$4,000 per year range for most synagogues. And, as with the underlying CiviCRM, jManage customers

may have an unlimited number of users. (See pricing details at <https://jvillagenetwork.com/shulsuite-pricing>.)

Chaverware LLC manages and operates Chaverware, Congregation Connect, and Jvillage with a team of about 20 employees.

Membership Management 2000 mm2000.net

818-988-0008 / jim@mm2000.net

Membership Management 2000 (MM2000) helps around 150 customer synagogues meet their membership, accounting, communication, and reporting needs. The system also includes support for special events (including seating) and a cemetery module. While some smaller congregations (200 to 250 families) use the system, the typical customer tends to be a larger congregation.

MM2000 is installed, and works on Windows. A single user license for MM2000 costs \$2,750, with multi-user licensing (for two to five users) available for \$3,350. Optional enhancements, such as MMOnTheWeb (also known as the "member portal"), a school module, campaign management module, QuickBooks interface, and automatic payment options are available for additional fees, as is MM2000+, which syncs data from MM2000 to the Salesforce platform. (See pricing details at <http://www.mm2000.net/pricing.php>.) Customers pay for the initial software and modules desired, then the only recurring cost is annual support.

MM2000 also offers customization services to customers. As customers need features, they're often developed as a fee-based custom programming project for one customer, then made available for other customers to install. For example, a custom group management feature that automatically removes people from a group if no payments are made was developed for one customer, then released as a file that other customers could choose to install. A team of six handles all sales, software development, and support of MM2000.

Rakefet

rakefetunlimited.com

855-725-7874 / rush@rakefetunlimited.com

Rakefet offers an all-in-one database management and accounting system with an integrated Jewish calendar. Rakefet seeks to serve all of your database and accounting needs—while some customers choose to use the system with an accounting system, such as QuickBooks or Sage, other companies use Rakefet to handle both functions. Basic and network versions of Rakefet for Windows both optionally work with RakefetOnline-Hybrid extensions that allow people to push data to the new RakefetOnline platform, hosted on Microsoft Azure.

The current RakefetOnline-Hybrid system lets staff handle email (e.g., templates with data field merges), view people's account information (including family and yearzeit details) and transaction history, print donor receipts and statements, and export data. It also allows members to see account details, transaction history, and export their own data. Members also may sign in and make payments online. Rakefet Unlimited LLC said that it plans to offer all the full features of the installed Windows version in a Cloud-hosted version but did not provide a timeline.

The full networked database management and accounting package of Rakefet is \$1,080, while the basic standalone database management and accounting package is \$995. After the initial purchase, annual support and service costs are \$375 per year for the networked version or \$300 per year for the basic version. Both include unlimited RakefetOnline-Hybrid access regardless of database size, and support for an unlimited number users. See pricing details at <http://www.rakefetunlimited.com/SearchResults.asp?Cat=1851>.)

About 600 customers worldwide use Rakefet, including places such as the United States, Canada, United Kingdom, many countries in the European Union, Australia, South Africa, and Hong Kong. The team behind the product consists of the CEO, two technical support assistants, a project manager and two programmers.

ShulCloud

shulcloud.com

845-507-0670 / questions@shulcloud.com

Since ShulCloud started in 2011, the number of customers has grown to almost 800. As an entirely Cloud-based software that people access from any Web browser, the system is intended to be an integrated solution for any synagogue, handling membership, email, invoicing, school data, and more. ShulCloud includes a website Content Management System, with the flexibility for a person who knows CSS—the language used to describe the presentation of webpages to the underlying code—to customize the appearance as desired. The system runs on Amazon Web Services infrastructure.

ShulCloud provides people multiple ways to accomplish tasks. For example, you can add a transaction while in a customer record or enter several transactions from a quick-entry screen. The data ends up in the same places, but the system supports adding it in either place, due to different workflow needs. ShulCloud also integrates with QuickBooks (desktop and online), with several different ways to configure this connection.

Customer feedback shapes the system. ShulCloud maintains a feature request list visible to customers (i.e., each system administrator) where people can ask for modifications, additions, or changes. The most “up-voted” requests get attention.

ShulCloud offers both monthly or annual pricing, with plans starting at \$99.99 per month or \$1,080 per year. The most full-featured School plan, includes a member portal, an invoicing and online member payment system, as well as a school, teacher, and parent portal. No ShulCloud plans require either a short-term or long-term contract: customers can leave whenever they want. See pricing details at <https://www.shulcloud.com/plans>.

The team of 25 people at RustyBrick, the makers of ShulCloud, also host an annual ShulCloud conference for customers. The sessions include a mix of basic system walkthroughs, new feature demonstrations, and customer-presentation stories. Many of the sessions are either live-streamed and/or recorded.

MATRIX OF SYNAGOGUE MANAGEMENT SYSTEMS

This chart aggregates the basic information about each of the systems covered in this report. Pricing was accurate as of August 2018, but is subject to change. Please see vendor websites for current information about pricing and features. (Note that most vendors offer upgrades for more features not shown here; some of those upgrades may be essential to meet your particular needs.)

System Name	Website	Installed or Cloud?	Starting Pricing Model
ChabadSuite	chabadsuite.com	Cloud	Pricing starts at \$780 per year for organizations with up to a \$100,000 budget or up to 5,000 contacts.
Chaverware	chaverware.com	Chaverware 5 installed on Windows / Chaverware 6 web	Either purchase Chaverware and technical support separately or agree to a five-year contract for support (with annual payments). Lowest-cost five-year contract costs \$1,995 per year.
CiviCRM	civicrm.org	Installed or Cloud	Database platform that most organizations will work with a consultant to customize. As open source software, the core software is free. Fees would be for either third-party products or consultant expertise.
Congregation Connect	congregationconnect.com	Cloud (built on Salesforce platform)	Priced based on a specific number of name users. You'll need Salesforce licenses for each user. Congregation Connect support packages start at \$360 per user per year.
Jvillage	jvillagenetworks.com	Cloud (built on CiviCRM platform)	Monthly subscription cost vary based on the size of your community and yearly support package. Typical costs in the \$2,500 to \$4,000 per year range.
Membership Management 2000	mm2000.net	Installed on Windows	Single user license costs \$2,750, with multi-user licensing available for \$3,350.
Rakefet	rakefetunlimited.com	Installed on Windows, with some functionality available in RakefetOnline-Hybrid (Cloud).	Basic stand-alone system \$995, with networked version available for \$1,080.

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System Name	Website	Installed or Cloud?	Starting Pricing Model
Salesforce	salesforce.org	Cloud	Salesforce Foundation offers qualified organizations access to a limited number of free licenses, as well as access to the free-to-use Nonprofit Success Pack. Additional licenses start at about \$325 per person per year. Additional fees would be for third-party products or consultant expertise.
ShalomCloud	shalomcloud.com	Cloud	Pricing starts at \$36 per month for three full-time users who work with up to 250 families.
ShulCloud	shulcloud.com	Cloud	Offers monthly or annual pricing, with plans starting at \$99.99 per month or \$1,080 per year.
TempleTracker	foglecomputing.com	Installed on Windows	Pricing starts at \$850 to purchase a system licensed to manage up to 300 families.

ADDITIONAL OPTIONS

While the six systems profiled in the last section were those mostly commonly used systems, according to our research, they're not the only options for synagogues. This section looks at some of the more viable options.

CRM Database Platforms

Two widely-used web-based database platforms, Salesforce and CiviCRM, offer the option for synagogues to create a “build-it-yourself” option by customizing the stock database.

CiviCRM

<https://civicrm.org/>

As an open source project managed by a nonprofit organization, CiviCRM is used by thousands of organizations around the world. Notably, anyone may download, install, customize, and use CiviCRM at no charge

Salesforce

<https://salesforce.org>

While Salesforce is a for-profit organization, the Salesforce Foundation offers qualified organizations access to a limited number of free licenses, as well as access to the free-to-use Nonprofit Success Pack.

Developers have built a large number of third-party extensions and apps for each platform, which makes it possible for people to extend their capabilities. However, the experts we spoke with consistently advised that synagogues should only consider customizing these systems if they're able to support software development and maintenance on an ongoing basis.

“It is useful—and nearly necessary—to have a full-time Salesforce administrator on staff, or access to an expert consultant,” one person recommended. Another cautioned that “Salesforce isn't for everyone—it needs expertise to customize and modify.”

Several larger synagogues have worked successfully with consultants to customize Salesforce to meet their needs. Similarly, some synagogues and networks have successfully customized and deployed CiviCRM for their purposes. In every case we learned of, though, the organization had technically knowledgeable people on staff, as well as the ability to pay for the expertise of external consultants with deep knowledge of the systems. Speaking more strongly, one expert emphatically said that the use of a custom-built system for a small synagogue is “an incredibly bad idea.”

Larger synagogues may find the ability to build and customize a system to meet their needs both feasible and desirable. But in most cases, a small and mid-sized synagogue that lacks technical staff and/or the ability to budget for significant consulting assistance should look at one of the vendor-offered solutions first.

Other Faith-Based Solutions

Here's a brief look at some of the other synagogue and faith-based management solutions mentioned by survey respondents.

ChabadSuite

<https://www.chabadsuite.com/>

A few survey respondents said they use ChabadSuite, a web-based system designed for Chabad that serves about 75 customers in all. Founded in 2014, ChabadSuite seeks to provide a turnkey, customizable, and easy-to-use system built on the CiviCRM platform, and offers a streamlined interface and adds congregation-specific customizations. Pricing starts at \$780 per year for organizations with up to a \$100,000 budget or up to 5,000 contacts (<https://www.chabadsuite.com/pricing>). Upgrades are available for organizations with larger budgets, more contacts, or for added features, such as embeddable forms.

ShalomCloud

<https://www.shalomcloud.com/>

A single survey response cited ShalomCloud, a Cloud-based system available since 2017. ShalomCloud has grown to serve almost 20 mostly small- and mid-sized congregations, and shows a steady pace of development, with new features regularly announced on the company blog (<https://blog.shalomcloud.com/>). The system syncs financial information to QuickBooks Online, and runs on Amazon Web Services. Pricing starts at \$36 per month for three full-time users who work with up to 250 families, with upgrades available for synagogues that need more full-time users or more families (<https://www.shalomcloud.com/#pricing>). All tiers of pricing include an unlimited number of casual users and “endless support.”

TempleTracker

<http://www.foglecomputing.com/>

A single survey response cited Temple Track, from Fogle Computing Corporation, an installed system built in Microsoft Access for Windows machines. Currently used by about 20 synagogues of varying sizes, it includes a custom ReportWriter, and also works with the Fogle Computing Corporation’s

accounting package, which handles an organization’s general ledger and accounts payable. (The system supports export of data to QuickBooks desktop, too.) Pricing starts at \$850 to purchase a system licensed to manage up to 300 families, with upgrades available to manage more families or support installation on SQL Server. The company’s accounting software is also available for optional purchase.

In addition to the synagogue management solutions already covered, some of the synagogues we spoke with were using other church- or faith-based management systems, such as Realm (<https://www.acstechnologies.com/products/realm>), a Cloud-based system that serves as both a website and database. We’re also aware of Shluchim (<https://www.donarius.com/Shluchim.html>), which is a synagogue-focused version of Donarius church management software.

Additionally, a couple of experts mentioned Hineynu (<https://www.hineynu.com/>), which primarily is a system built for pastoral care, and typically used by an individual Rabbi.

While each of these systems may work well in a specific setting, most synagogues will want to look at other synagogue management system options first.

CONCLUSION: ENGAGE WITH CHANGE

As of mid-2018, we see a synagogue management system market where vendors increasingly offer Cloud solutions and where outside capital causes consolidation.

“None of the current offerings satisfies all needs,” one of our survey respondents said, summing up the market of existing systems. “None of the programs is perfect.” We agree—any system you select will likely lack features you want, or have features you wish worked differently. To quote another respondent, “There is no perfect solution.”

Which makes it that much more important to find the system that does what you need it to, and that can help move your synagogue and its community forward. As you begin your search and selection process, there are a few more things to keep in mind.

Don't get distracted by the “shiny object syndrome” of features you don't need—ease of use is a key factor in how successful any system will be for your synagogue.

“I would advise something that is simple to use, and that employees and lay leaders will take ownership of,” another respondent told us. “Complex systems are more likely to fail in implementation.”

But what one person perceives as simple, another might perceive as complex. That's one of the reasons it's so important to involve multiple stakeholders and people with different perspectives in the conversation as you select a new system and switch over to it.

Don't get distracted by the “shiny object syndrome” of features you don't need—ease of use is a key factor in how successful any system will be for your synagogue.

Finally, we recommend you choose vendors that continue to change. Look for vendors that fix bugs, add features, and communicate clearly.

“It's important to get a system that is continually upgrading and making changes to better serve the customers,” one expert told us. “Technology is evolving fast—look for a vendor whose product is constantly evolving.”

Applying the criteria discussed in this report and approaching the selection process thoughtfully will help ensure you find a solution that best meets your needs.

APPENDIX A: METHODOLOGY

Research for this publication built upon the first two joint Idealware/UJA reports looking into synagogue management systems.

UJA provided a list of six people familiar with synagogue management systems from across the denominational spectrum and areas of expertise. Idealware spoke with each of these experts and wrote up notes. Following each conversation, we asked the person we spoke with to review and confirm that our understanding was accurate.

Idealware also sought input from people in the field. To do so, we distributed a survey to a broad list of synagogues and denominational umbrella movement organizations compiled from UJA and Idealware sources. We also shared the survey link with the synagogue management system vendors identified by our experts in an attempt to elicit response from current customers. More than 125 respondents provided insight into synagogue management systems currently in use.

The survey responses helped us identify additional systems not identified by our experts. A summary of those results can be seen beginning on the next page.

Finally, we researched the synagogue management system vendors. For every system included in the report, we spoke with a vendor representative. Prior to these conversations, we reviewed publicly available information on each vendor's website as well as prior Idealware analysis, where available. Following each conversation, we wrote up notes and asked the vendor representative to review and confirm our understanding of the conversation.

Idealware wrote the text, which then went through review and revision by both UJA and Idealware staff. We also asked each vendor to read and correct any errors of fact in a draft of a product description written by our researcher.

APPENDIX B: SURVEY RESULTS

In the spring of 2018, Idealware and UJA distributed a survey to our mailing lists and to everyone who downloaded past editions of this report, asking about their synagogues, the software they use, and how these systems are perceived. We also asked each of the vendors of the systems profiled in this report to share the survey link with their customers.

- We received a total of 126 responses representing a wide range of organizations.
- About 66 percent of respondents indicated their synagogues served fewer than 500 families, and just under 7 percent said their congregations served more than 1,000 families.
- Similarly, responses came from across the spectrum of denominations: 40 percent of respondents identified their synagogue as Reform; 26 percent as Conservative; and 19 percent as Orthodox.

Key survey findings follow.

Many synagogues are first-time users of contemporary synagogue management systems.

More than half of respondents reported that their prior system was “nothing,” “QuickBooks,” “Excel,” or custom-built. A much smaller number reported that their prior system was another synagogue management system. This indicates that many synagogues still use the first synagogue management system they deployed.

Synagogues tend to stick with a system for several years—but a notable number are looking to switch.

About half of respondents indicated that their synagogue had used the same system for more than five years. Roughly one in five said they’d been using their current system less than a year.

There are primarily three widely-used systems among synagogues.

According to both survey results and vendor disclosures, ShulCloud has the most customers, followed by Chaverware and Rakefet. We asked the vendors how many synagogue clients they had—their responses follow (note that these are self-reported and not verified by Idealware):

System Name	Number of Clients
ShulCloud	800
Rakefet	600
Chaverware	550
Membership Management 2000	150
Jvillage	100
ChabadSuite	75
Congregation Connect	50
ShalomCloud	20
TempleTracker	20

Nearly all synagogues pay less than \$5,000 per year to the vendor for their systems.

A little less than half (48 percent) reported vendor payments within the \$2,000-\$4,999 range. Almost as many (46 percent) reported spending less than \$1,999. This fits with what we heard from experts—while large synagogues may spend a significant amount on software systems, most synagogues spend far less.

Most synagogues are generally satisfied with their system.

About 75 percent of synagogues rated their satisfaction with their synagogue management system as average or better, but 25 percent rated some level of dissatisfaction with their system.

Most synagogues are generally pleased with vendor support.

More than 60 percent of respondents rated vendor support positively (i.e., as a four or five, with five being the highest). Nearly 25 percent rated vendor support as average.

One in four synagogues would not recommend their system to others.

While nearly half of respondents indicated they would recommend their current system to others, about one in four said they would not. That's one reason we strongly recommend you talk with colleagues and peers when selecting a system.

ABOUT THIS REPORT

About UJA-Federation of New York

UJA-Federation of New York is the largest local philanthropy in the world. For more than 100 years, we've brought New Yorkers together to solve some of the most pressing problems facing our community. Thanks to our network of hundreds of non-profits, we can leverage our expertise across any number of areas—including health and human services, arts and culture, and education—to care for Jews everywhere and New Yorkers of all backgrounds, respond to crises close to home and far away, and shape our Jewish future. Our reach extends from New York to Israel to nearly 70 other countries around the world, touching 4.5 million people each year.

About Idealware

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 to learn more or view our hundreds of free articles, resources, and reports, or contact us at info@idealware.org.

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