

Case Management Software for Nonprofit or Education Organizations

The table below provides basic information about common case management software for nonprofit or education organizations. The organization [Tech Soup](#) provides reduced cost licenses for Tableau and Microsoft Office products. The organization [TechImpact IdealWare](#) provides research, assessments, and tools to help nonprofits solve technology challenges. Software applications listed below are shared as examples and for exploratory purposes only. An assessment process to identify purpose, requirements, and options should be developed for each organization considering a technology solution.

Company	Software	Description	Relative Cost	Helpful features	Organization size recommendation
Microsoft	Excel	Microsoft Excel is a spreadsheet, primarily used for calculations, but sometimes used to track simple case management tasks like event attendance.	It is included in the Microsoft Office suite, and can be purchased either as a standalone software or as part of the Office 365 cloud software for \$2-\$23 per user	Excel may be the easiest program to start using right away. It improves on paper forms by allowing for digital entry that is easier to analyze than hard copy.	Excel is a cost-effective, but not very flexible solution for data collection and storage.
Microsoft	Access	Microsoft Access is a database with a graphical user interface and software-development tools. It is only available for PC use.	It is included in the Microsoft Office suite, and can be purchased either as a standalone software or as part of the Office 365 cloud software for \$2-\$23 per user	The graphical user interface makes designing the database relatively simple, compared to using a code-based system. It can be completely customized for an organization.	Very cost effective for an organization with staff ready to design a custom database.
Software Solutions	Apricot <ul style="list-style-type: none"> • Apricot Essentials • Apricot Core • Apricot 360 	Apricot includes three versions of the software with increasingly sophisticated features for multisite	Cost by quote only.	May have the most accessible/friendly user interface. Nice to be able to ramp up complexity of	Can serve a range of organizations.

Company	Software	Description	Relative Cost	Helpful features	Organization size recommendation
		programs, volunteer management, donor data tracking, and data analytics		program with versions.	
Software Solutions	Efforts to Outcomes (ETO)	ETO is a comprehensive outcomes and case management tool for large nonprofits, government agencies, and community collaboratives.	Cost by quote only.	File transfer and data sharing may be easiest across organizations with ETO, as it is a tool often used for government and community collaboratives.	Targeted to larger organization and collaborative efforts; no customization for size.
Salesforce Salesforce.org	Salesforce Nonprofit Cloud	Salesforce can be used to manage client, volunteer, and donor data.	\$36-\$72/per month per user with the first 10 users free.	Flexible interface and easy to do batch updates.	May require data-focused staff, particularly as the basic software is for private sales, not nonprofits.

Common fundraising-only software programs

- [The Raiser's Edge](#)
- [Little Green Light](#)
- [Bloomerang](#)
- [DonorPerfect](#)

Data visualization software

- [Tableau](#)