Email Communication Tools:
An Overview and Workshop for Nonprofits

Synopsis

As nonprofits increasingly turn to email both for their traditional member communications and for new kinds of mission-related activity made possible by the medium, they may discover a somewhat bewildering array of options that defy quick and easy comparison and evaluation. In this session we attempt to help nonprofits in the selection process by making a series of distinctions between different types of email list-related solutions and different primary functions (discussion, broadcast, and RMS), and by presenting partial lists of common features and of currently available solutions in three price ranges. We will also engage in group discussion around various special topics of interest to the audience, possibly including unmet technical needs, training needs, and selection-and-evaluation needs, avoiding spam-filtering, and the role of open-source software.

Technical Overview

Available solutions for communicating with groups via email can be divided according to several useful criteria:

- **Free vs. paid:** Free commercial services such as YahooGroups and Topica have introduced legions to the concept and benefits of list servers, but are ultimately inadequate for many groups' needs, while free/open-source software can be much more capable but requires technical savvy and infrastructure. Paid options range from very cheap to significant cost, and we use cost as the primary grouping in the attached solution matrix because we find that for many nonprofits, this is the primary determinant of which solutions are feasible.
- **ASP (hosted) vs. in-house software:** Application Service Providers, or hosted solutions, are ideal for many organizations because of the complexity of mass email communications, the rapid changes in the technology, and the mission-critical nature of this activity. Those groups with considerable native resources and expertise, and whose needs simply cannot be met by any available ASP, may consider running in-house software packages that handle email list functions. However, they should be well-versed in such important issues as bounce handling, spam filtering, DNS blacklisting, and system reliability.
- **Broadcast vs. discussion:** Although many of the available tools are general-purpose and can be used for either broadcast/newsletter/marketing functions or for group discussion/collaboration, the ideal features for these two types of communication are actually increasingly divergent, and most solutions are much stronger in one primary function than in the other. Many organizations come to email lists via newsletters, yet the more common (free or inexpensive) ASP solutions tend to focus on the discussion group feature set and lack the advanced broadcast email features that these groups might want. There are, of course, notable exceptions.

- **Stand-alone vs. integrated:** Most of the free and inexpensive solutions for mass email communications are just that: email communication systems only, which do not attempt to serve as an organization's primary constituent database. (Again, there are exceptions.) Some will integrate or synchronize with the primary database for member addresses, with varying degrees of sophistication and smoothness, while some can only be kept synchronized via labor-intensive export/import operations. But at the higher end of the market are complete integrated solutions, mostly ASP-hosted, which provide extensive database and RMS (Relationship Management System) features for managing and interacting with large groups of people via email and other media (regular mail, phone), event and volunteer management, surveys, petitions, donation processing, fundraising drives, etc.

Solution Matrix

We have compiled a non-exhaustive list of currently available service and software packages (see attached chart), and grouped them primarily in terms of their cost, although the resulting grouping also closely matches what we would get by separating the stand-alone solutions from the integrated ones. Costs represent monthly rates for ASP-hosted solutions, or else initial standard license fees for software packages, and all are simply estimates of a general range.

We have also listed some of the most common features that can distinguish one tool from another, grouped by primary communication focus (general, broadcast, or discussion). Because of the magnitude of research required and the changeable nature of detailed feature sets over time, we have not attempted to determine each individual solution's features at the present moment, but have simply indicated whether one should generally expect to find a given feature in each of the three price categories. Only the major criteria discussed above are marked individually for each solution.

Further Reading

DotOrg Media newsletter issue #9, which formed the starting point for this research:
http://www.dotorgmedia.org/Publications/Publications.cfm?ID=76&c=18

Summit Collaborative version of the above, somewhat revised:
http://www.summitcollaborative.com/mailtools.html

ONE/NW's collection of articles, several dealing with nuts and bolts of list admin:
http://onenw.org/bin/page.cfm/secid/15

Glossary of Selected Features

Integration with RMS database: Subscriber lists can be pulled from or synchronized with an organization's primary constituent database, rather than maintained separately.

HTML/multipart messages with subscriber choice: Messages can be sent with HTML formatting, with an accompanying plain text version for non-HTML-capable email clients, and subscribers can choose which format they prefer.

Secure communication (Web and email): Tool allows for SSL-encrypted Web communications (if applicable), and/or for encrypted/authenticated email communications using PGP or other technology.

Subscriber statistics / reports: Reports that go beyond basic subscription and bounce status to profile subscribers and their list-related activity.

Automated bounce management: Addresses that bounce (ie. are invalid, over quota, etc.) are tracked and stored, and usually can be automatically unsubscribed according to criteria set by the administrator.

Single-click unsubscribe links: Each message sent to a subscriber contains a unique URL or email link they can use to unsubscribe, rather than having to know and provide their subscribed address and/or password.

Event management: Tools to manage complex event planning activities, such as conference registration and volunteer matching.

List segmentation: The ability to dynamically select sub-sets of a list for targeted mailings.

Message personalization: AKA mail merge, the ability to insert subscriber-specific information into a mailing, such as full name or email address.

HTML creation tool: Provides an interface for administrators to easily craft formatted HTML messages, possibly using pre-existing templates, rather than requiring them to format messages in an email client or Web editing software.

Tracking and reporting of delivery, open rates, click-throughs: Uses embedded code in messages to report back to the server on who actually opens a mailing, which links within the mailing they click on for further action, etc.

Tell-a-pal emails: An easy button or link in a mailing that subscribers can use to pass it on to their friends, which can be tracked by the server (unlike a standard email forward).

Integration with Web-based actions: Mailings can be coordinated with issue-specific or event-specific Web pages, preserving identifying information about the user to smooth their transfer to the Web system.

Specified delivery speed: Tool provides a known and reliable level of performance in delivering large numbers of messages.

Customized auto-replies to incoming messages: Administrator can designate certain addresses, such as conference@mydomain.org, as auto-responders that will send back a chosen information file in response to inquiries.

Integration with / tracking of other contact methods: Facilitates the use of regular mail, telephone contacts, etc. with subscribers.

Extended and extensible user data fields: Subscriber data can include non-email-related information, such as geographic and demographic data, and may be extended to include customized fields of the administrator's choosing.

Clean text digests: For subscribers using a "digest" mode to receive batches of daily/weekly mail in one message, HTML parts and attachments are stripped from included messages, leaving only a readable plaintext part.

Spam / virus protection: Spam or viruses sent to a list address are blocked or cleaned before distribution.