

Sage Nonprofit Solutions

Sage Fundraising & Membership Solution from Provida Pty Ltd



Sage Fundraising 50

Prepared by Provida Pty Ltd

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Introduction

Provida Pty Ltd is a leading Australia ERP/CRM software integrator that specialises in implementing software solutions for charities and non-profits. Provida is a Sage Select Partner and the only Australian Sage partner to implement and integrate Sage Fundraising 50.

Provida has implemented Sage software solutions into some of Australia's top charities including Save the Children, Legacy, Amnesty International and MS Society.

Sage Fundraising Modules

Donor Management

The Donor Management features in Sage Fundraising 50 provides you with the ability to manage all aspects of constituent management, including solicitations and the gifts that result from various fundraising initiatives. Use this donor management software to develop and maintain profiles of your donors and contributors, track giving amounts and personal demographics, and target future requests.

- Easily track key information associated with donors and prospects, including contribution details
- Quickly display key data for campaigns, appeals, funds, events, proposals, membership drives and more with the dynamic "Snap Shot" charts
- Move donors to the next giving level, improve communications and solicitations with scheduled key communication opportunities and comprehensive tracking for each donor
- Easily access comprehensive demographic information for any individual, family or organization
- Increase contribution opportunities with complete relationship, affiliation, membership and history tracking for each donor
- Know more about your donors with unlimited attributes, specialized notes, and file attachment capabilities to enhance donor profiles

Campaign Management

Robust campaign management tools in Sage Fundraising 50 allow you to plan and manage simple or complex fundraising campaigns, including all the supporting activities such as events, solicitations and major gift requests for those campaigns. Built-in fundraising management tools give you the visibility to maximize the levels of responses, minimize the costs and more.

- Increase the effectiveness of your fundraising campaign processes from prospect analysis and communication delivery to measuring results
- Plan effective campaigns with standard analytical reports that show performance summaries by campaign and fund, relative to the previous year or current goals, and direct mail analysis
- Selectively target solicitations and maximize the rate and level of your response
- Quickly access the status of campaign progress through Snapshot Campaign Summary Reports or Campaign overview graphs
- Keep key campaign stakeholders in the know before, during and after the campaign with comprehensive campaign reports
- Easily track and report on each activity's cost-per-dollar-raised directly in Sage Fundraising 50

Gift Management

Comprehensive gift management capabilities allow you to set up and manage your data entry, gift and pledge tracking, payment schedules, acknowledgements and receipting with ease. Use the full gift management functionality to your advantage by implementing new fundraising programs for sustaining, recurring or monthly giving without the need for additional resources.

- Increase staff efficiency with quick gift entry tools
- Keep pledges up-to-date with payment scheduling and automated reminders
- Easily record, track, and retain detailed information for all gift types and pledges with unlimited user-defined gift attributes, including gifts made in honor or in memory (tributes)
- Acknowledge and share gifts properly with split gifts and gift sharing
- Quickly generate customized acknowledgments and receipts
- Save time on data consolidation with capabilities to record gift details in accordance to your finance office's accounting structures and transferring the gift data electronically

Event Management

Sage Fundraising 50 can be used to plan, organize, and manage all aspects of both simple and complex fundraising events, even produce name tags. The event management software will help you to strengthen and grow the events while continuing to use your organization's unique approach.

- Easily manage the complete event cycle, including event and activity planning, invitations and responses, registration, attendance, guest information, and seating and grouping
- Accurately tracks fees associated with events, and generate gifts and pledges if the fee, or a portion of it, is considered a donation
- Customize Sage Fundraising 50's Event Management Software for your specific types of events such as galas, conferences, golf tournaments, and charity walks
- Maintain comprehensive participant information as well as expenses and revenues generated for cost benefit analysis
- Turn guests into continuous supporters with tools to identify non-constituents on your guest lists
- Increase the success of your events with easy, yet comprehensive reporting

Volunteer Management

Strengthen your network of volunteers with Sage Fundraising 50's volunteer management capabilities. Maintain several levels of volunteer management, from a simple assignment and hours tracking system to a detailed hierarchy structure of information.

- Build volunteer profiles to track preferred hours, availability, and key skills and interests to match volunteers with available jobs
- Create volunteer schedules, track hours, and value of volunteered time for development reports
- Easily track your volunteer's past contributions and work, including dollar values associated with the activity
- Manage volunteer contact with potential and current donors with moves management capabilities
- Schedule and manage volunteer recognition events, as well as anniversaries and awards

Memberships

Use Sage Fundraising 50 for membership management to easily profile each member and instantly access information regarding each constituent's joining date, with whom he or she has relationships, and when the constituent needs to renew his or her membership.

- Effectively track key information associated with memberships including renewed, lapsed, and dropped memberships
- Automatically generate renewal notices in advance of expiration for effective membership management
- Increase renewal rates and target possible membership upgrades with comprehensive querying and reporting on expiring memberships
- Quickly access membership lists, membership level lists, status, and analysis of membership changes
- Increase membership opportunities with complete relationship, affiliation, history tracking for each member
- Know more about your members with unlimited attributes, specialized notes, and file attachment capabilities to enhance member profiles

Comprehensive Reporting

Accurately and easily illustrate your campaign, progress and fundraising results with Sage Fundraising 50's easy-to-use report writer. With more than 100 standard reports and flexibility to easily create custom reports, you can access precisely the information you need to make better decisions and show your case for support.

- Quickly produce campaign progress reports, performance analyses and campaign results for executives, major donors and boards with this fundraising and grant management software.
- Save time by adapting one of hundreds of standard reports to obtain the data needed by your organization
- Easily run queries to compare campaigns or years, examine levels of giving by demographic, pinpoint messaging targets and more
- Fully analyze all areas of fundraising activities for better decision-making with comprehensive data mining tools
- Easily export the report data to into multiple formats for your annual reports, donor newsletters, or grant reports
- Keep stakeholders in the know by distributing PDF-formatted reports and information by emailing reports directly from the system

Contact Management

Easily maintain and track the status of your donor contacts, including solicitations, invitations, and correspondence with CRM nonprofit management capabilities in Sage Fundraising 50. Improve relationships with foundations and corporations with set reminders about upcoming steps and deadlines for grant proposals and grant reporting.

- Move donors to the next giving level with scheduled key communication opportunities
- Easily track best times and methods of contacting supporters, including multiple addresses, phone numbers, and emails
- Never miss a scheduled contact or grant deadline with tickler reminder feature
- Increase your organization's grant opportunities with the proposal tracking card

- Associate each prospect with a staff member and set alerts for upcoming proposal steps and deadlines

Payment and Online Gift Processing

Integration to Sage Payment Solutions provides you with pledge and online gift processing from within your Sage Fundraising 50 software. Quickly and easily process credit and debit cards and electronic checks real-time or in batch mode for processing at a later date. Increase donations captured via your web site with PCI compliant “Donate Now” capabilities.

- Increase operational efficiency and save valuable resource time with gift processing within a single system
- Save money with nonprofit group processing rates
- Reduce liability and limit exposure to possible credit card data breaches
- Eliminate time-consuming duplicate data entry and potential data entry errors
- Lower costs further by accepting ACH payments in addition to credit cards
- Boost donor retention by easily establishing a comprehensive recurring giving program with limited maintenance efforts

Gift Matching

It can be a complex process to track and identify opportunities for gift matching. Using the gift matching feature in Sage Fundraising 50, the process is simplified, opening a door for your organization to benefit from increased awareness of constituents and employers.

- Maximize your efforts to capture all possible donor dollars by identifying possible matching gift opportunities
- Collect on all possible contributions by tracking and identifying relationships between employers and your constituents
- Reduce data entry with automatic creation of matching gifts
- Acknowledge and share gifts properly with split gifts and gift sharing
- Easily analyze gifts generated from matching gifts within each campaign or solicitation or project potential gifts with flexible reporting options

Communication Toolset for CRM nonprofit

Effectively communicating with your donors is the key to retention, gift growth, and loyalty. Sage Fundraising 50 has a range of e-mail, mail merge, and other tools that work directly in the CRM nonprofit system to effectively communicate with your constituency, personalize your message, and tell your story.

- Easily create deeply personalized appeals, thank-you notes, acknowledgements and receipts with comprehensive merge capabilities
- Save hours of formatting time with “quick label” and envelope printing options
- Keep communications on track with Sage Fundraising 50’s abilities to work directly with Microsoft Outlook to display your e-mail, calendar and task lists
- Reduce marketing costs and reach your constituency quickly through targeted e-mails
- Easily send mass e-mails using time-delayed batching tools to help ensure your e-mail communication does not become blocked or marked as spam

Data Import Wizard

It's quick and easy to import excel data or other program data from third-party applications, list acquisitions, or other systems in your office into Sage Fundraising 50. The Data Import Wizard allows you to drag-and-drop data onto the desired card, visually verify accuracy, and validate your data before importing.

- Eliminate the need for manual entry of list data
- Save time with options to create templates for future imports of the data you consistently need in Sage Fundraising 50
- Easily keep your constituent's information current with update-and-replace functionality
- Maintain data integrity with options to visually verify data accuracy prior to the import, as well as the ability to "undo" the import

Additional System Features


Sage Fundraising 50 delivers critical system features to help manage, consolidate, and maintain your data efficiently and accurately. For example:

- Non Profit Accounting Interface — eliminate duplication of data entry and manual verification of gifts with the finance department with seamless GL export integration with Sage Accpac ERP 100, 200 & 500
- Import/Export Tool — quickly and easily to import data into the system using the drag-and-drop
- Data Import Wizard, and export the data you need into other applications with the quick export tools within the report writer
- Merge/Purge Utility — keep your data accurate by consolidating two similar records with merge/purge functionality
- Duplicate Check Utility — easily check your data for duplicate records both during and after importing data using the Duplicate Check utility
- Correct Data Services — ensure that your constituent data is up to date with user-friendly, cost-effective, efficient address cleansing and updating service.
- And more

Constituent Gift Entry Screenshot

Now viewing Carlos Macbrida's screen

Sage Fundraising 50: Schroeder Consulting Service
 File Module Navigator Gift Card Administration User History Help

SAGE FUNDRAISING  Ms Amanda Alvarado (771)

Navigator

- Home
- Constituents...
- New Constituent
- Query
- Browse
- Quick Email
- Quick Merge
- Quick Print
- User Defaults
- Print Card
- Constituent Reports
- Add Caddy Item
- Remove Caddy Item
- Credit Another
- Matching Pledge
- Help on Cards
- Campaigns
- Events
- Reports
- Quick Gift
- Bank/Credit Processing
- Online Gift Processing
- Donate Now Processing
- Help

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Transaction: **Gift** Added: 10/5/2009 Data Entry

Date: 10/5/2009 Campaign: 06 Annual Campaign

Amount: \$75.00 ANONYMOUS

Tender: Check

Solicitation: 06 Fall Mailing

Purpose: Elderly Services

Fund: Family Fund

Solicitor:

Hon/Mem:

Benefit:

Quantity: FMV: Date 1:

Letter: In Kind Item:

Check #: Table 2:

Receipt Type: On Demand Date: Other Things:

Receipt #: In Kind Description:

Batch: 10/5/2009 admin

Total: \$100.00

Constituent Giving Summary Report

Calendar Year	Cash Total	All Transactions	
2009:	\$12,744.00	First: 1/26/2003	\$25.00
2008:	\$305.00	Last: 10/5/2009	\$25.00
2007:	\$305.00	Largest: 8/21/2009	\$11,111.00
2006:	\$100.00		
2005:	\$150.00	Cash Total To Date:	\$13,829.00
2004:	\$100.00	Committed Total To Date:	\$13,829.00
2003:	\$125.00	Total Unpaid Pledges:	\$0.00
2002:	\$0.00		
2001:	\$0.00		

Generate Reports Screenshot

Go To Meeting Viewer
Now viewing carlos machuca's screen

Sage Fundraising 50: Schroeder Consulting Service

File Module Navigator Reports Administration User History Help

SAGE FUNDRAISING sage software

Financial Reports - Bank/Credit Transactions

Navigator

- Home
- Constituents
- Campaigns
- Events
- Reports...
- Constituent
- Financial
- Analytical
- Volunteer
- Event
- Membership
- Grant/Prospect
- Other
- Receipt
- Add Shared Report
- Help on Reports
- Quick Gift
- Bank/Credit Processing
- Online Gift Processing
- Donate Now Processing
- Help

Select a Report Sort by: Title

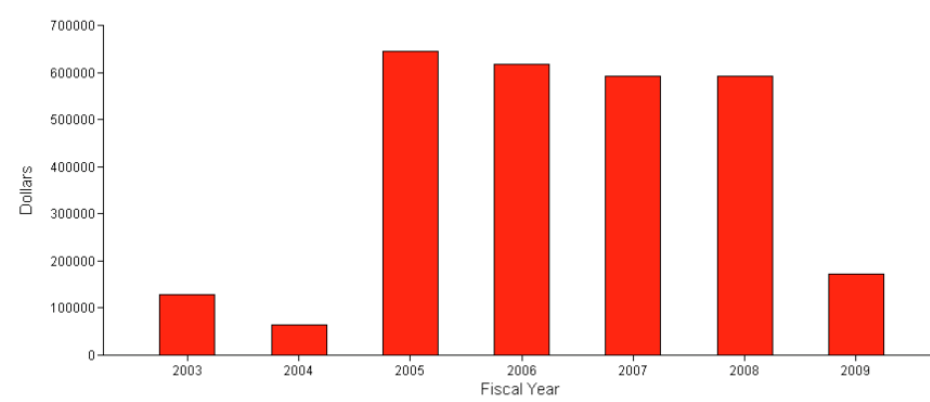
- Updated Donation Transaction Log**
Gifts and Pledge Payments entered from the start of the FY to today to be used to reconcile with the business office. Last run 4/17/2007 by Administrator with 522 records. Created from "Gift/Pledge/Payment Log".
- Year End Donation Reports \$250 or more**
Donation Summary Report to be run at the end of the year for donors who have given \$250 or more. Last run 8/1/2007 by Administrator with 232 records. Created from "Donor Statements".

Standard Reports

- Bank/Credit Transactions**
Creates a list of transactions that were paid using bank drafts and credit card payments. Last run 10/5/2009 by Administrator with 0 records.
- Consecutive Years**
Creates a list of donors with number of consecutive years, including total and average gift amount per year. Last run 5/7/2008 by Administrator with 0 records. Last saved on 5/7/2008 by admin.
- Custom Gift Export File**
Creates a custom export file, which can include financial transaction information. Last run 9/18/2007 by Training with 547 records.
- Custom Pledge Payment Reminders Export File**
Prepares a merge file specifically designed to be used for pledge payment reminders. Last run 10/5/2009 by Administrator with 32 records.
- Donate Now Transactions**
Creates a list of Donate Now transactions that were added to constituent records. This report has never been run.
- Donor List**
Creates a list of donor names and can optionally include up to three totals. Last run 8/1/2007 by Administrator with

Run Setup Delete

MTD Comparison by Fiscal Year Bar Graph



Fiscal Year	Dollars
2003	120,000
2004	60,000
2005	650,000
2006	620,000
2007	590,000
2008	590,000
2009	170,000

Sample Reports

Campaign Overview

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Analytical Reports - Campaign Overview
All Transactions This Year to Date

06 Annual Campaign

<u>Campaign Overview</u>		<u>Gifts and Payments Received</u>	
	<u>Amount</u>		<u>Amount</u> <u>Donors</u>
Goal:	\$675,000.00	Gifts Received:	\$506,761.00 355
Total Committed:	\$516,217.00	Pledge Payments Received:	\$1,699.00 16
Goal Remaining:	\$158,783.00	Matching Payments Received:	\$600.00 1
		Total Received:	\$509,060.00 370
Average Committed Gift:	\$1,259.07	<u>Pledges Received</u>	
Average Dollar Per Donor:	\$1,380.26	Total of Pledges Made:	\$5,230.00 18
Total Donors to Campaign:	374	Total of Matching Pledges:	\$4,226.00 7
		Total Overpaid on Pledges:	\$5.00 1
Percentage of Goal Met:	76.48%	Total Write Offs on Pledges:	\$263.00 1
Average # of Gifts Required to Meet Goal:	126	Total Due on Pledges:	\$6,934.00 22

Contribution Details

Campaign Start Date: 1/1/2006

<u>Contributor</u>	<u>Amount</u>	<u>Date</u>
First Gift: Lonnie Akin	\$70.00	01/01/2006
Latest Gift: Cathy Lucas	\$8,000.00	12/08/2006
<u>Top Ten Gifts</u>		
Largest: Digital Images, Inc.	\$300,000.00	06/16/2006
Advanced Electronics	\$125,000.00	01/06/2006
Cathy Lucas	\$8,000.00	12/08/2006
Tracy Jacobs	\$6,000.00	03/24/2006
ANONYMOUS	\$5,000.00	06/16/2006
Cathy Lucas	\$4,000.00	04/01/2006
Andrea Fisher	\$3,000.00	04/15/2006
Samuel Kiefer	\$3,000.00	03/18/2006
Nelda Fitzgerald	\$2,000.00	03/15/2006
Xavier Espenaldo	\$1,000.00	04/10/2006
Largest Gifts Total:	\$457,000.00	67.70% of Goal

Comparison Report by Purpose

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Analytical Reports - Comparison Report by Gift Code Gifts and Pledges

Purpose	Period 1 Feb 2007 through May 2007			Period 2 Jan 2006 through Mar 2006			% Change		
	Donors	Total	Average	Donors	Total	Average	Donors	Total	Average
Elderly Services	5	\$495.00	\$99.00	1	\$70.00	\$70.00	400%	607%	41%
Health Education	8	\$820.00	\$102.50	6	\$1,030.00	\$171.67	33%	-20%	-40%
Landscaping	7	\$733.00	\$104.71	1	\$30.00	\$30.00	600%	2343%	249%
Library Expansion	0	\$0.00		2	\$125,297.00	\$31,324.25	-100%	-100%	
Recycle Program	10	\$1,018.00	\$101.80	4	\$530.00	\$132.50	150%	92%	-23%
Student Scholarship	12	\$1,243.00	\$103.58	0	\$0.00		0%		
Student Scholarships	0	\$0.00		186	\$81,400.00	\$421.76	-100%	-100%	
Technology Upgrade	26	\$2,918.00	\$112.23	8	\$2,254.00	\$107.33	225%	29%	5%
Unrestricted	23	\$2,621.00	\$113.96	70	\$4,225.00	\$58.68	-67%	-38%	94%
	91	\$9,848.00	\$108.22	244	\$214,836.00	\$711.38	-63%	-95%	-85%

Analytic Report – Comparison by State

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Analytical Reports - Comparison Report by Demographic Code Gifts and Pledges

State/Province	Period 1 Jan 2006 through Apr 2006			Period 2 Jan 2005 through Apr 2005			% Change		
	Donors	Total	Average	Donors	Total	Average	Donors	Total	Average
Alabama	4	\$670.00	\$167.50	1	\$150.00	\$150.00	300%	347%	12%
Alaska	5	\$915.00	\$183.00	2	\$200.00	\$100.00	150%	358%	83%
Arizona	7	\$3,795.00	\$237.19	3	\$500.00	\$166.67	133%	659%	42%
Arkansas	5	\$3,605.00	\$600.83	4	\$300.00	\$75.00	25%	1102%	701%
California	30	\$15,331.00	\$294.83	12	\$1,750.00	\$134.62	150%	776%	119%
Colorado	33	\$15,815.00	\$343.80	7	\$1,185.00	\$148.13	371%	1235%	132%
Connecticut	20	\$8,353.00	\$321.27	3	\$450.00	\$150.00	567%	1756%	114%
Delaware	2	\$405.00	\$202.50	0	\$0.00		0%		
District of Columbia	4	\$3,440.00	\$344.00	1	\$55.00	\$55.00	300%	6155%	525%

Constituent Reports – Constituent Call List

Constituent Reports - Constituent Names and Addresses All Constituents

ID	Name	Telephone	Attributes	Comment
211	Mrs Ollie Fredricks CEO Advanced Electronics 3275 Avenue H Ste 112 Austin TX 78759 customerservice@advelec.com	(512) 368-9547	Corporation Unknown Corp Match Prog	
695	Mr Sean Cross 1007 Wellington Dr San Antonio TX 78216	(210) 420--2392 (210)	Individual Low \$50 - \$249 Website Male Y	
488	Dr Diana Daniels 2340 Tank Ln Houston TX 77233 ddaniels@nonprofit.org	(713) 254--3253 (713)	Individual High \$500 - \$999 Website Female Y	

Financial Summary – Campaign Gifts by Giving Level

Analytical Reports - Financial Summary by Gift Code by Giving Level 2006 Campaign Summary by Giving Levels

Campaign	Gifts	Donors	Total of All Gifts	Average Gift	Unpaid Pledges
06 Annual Campaign					
\$5000 and above	5	5	\$444,000.00	\$88,800.00	\$0.00
\$1000 to \$4999	6	6	\$14,000.00	\$2,333.33	\$0.00
\$500 to \$999	21	21	\$12,781.00	\$608.62	\$2,121.00
\$250 to \$499	57	52	\$18,030.00	\$316.32	\$3,074.00
Less than \$249	324	300	\$28,156.00	\$86.90	\$1,734.00
*	413	374	\$516,967.00	\$1,251.74	\$6,934.00

Financial Reports – Honor/Memory Gifts

In Honor of: Mr. Blaire Morey

ID	Name	Amount	Date
47	Mrs Trista Abala	\$100.00	04/15/2004
365	Mr Jackson Allen	\$1,050.00	01/17/2004
589	Ms Marjorie Brewer	\$700.00	01/27/2004
172	Ms Stella Chrome	\$500.00	04/01/2004
488	Dr Diana Daniels	\$95.00	03/18/2004
79	Mr Roger DeLonga	\$100.00	03/15/2004
765	Ms Rebecca Doyle	\$100.00	03/25/2004
615	Ms Michele Jimenez	\$100.00	03/20/2004
556	Ms Melissa McCoy	\$200.00	04/01/2004
702	Mr Danny McGee	\$500.00	03/17/2004
801	Ms Christina Owen	\$105.00	03/25/2004
115	Mr Lee Pan	\$350.00	03/15/2004
390	Mr Garrett Sanchez	\$350.00	03/20/2004
276	Ms Martha Scobey	\$135.00	04/10/2004
444	Mrs Maria Wallace	\$80.00	03/18/2004

Donors	Total	Largest	Smallest	Average
15	\$4,465.00	\$1,050.00	\$80.00	\$297.67

END OF DOCUMENT