

CUSTOMER SUCCESS



Sage Fundraising 50 makes the grade for Ascension School

Since 1912, Ascension School has been providing top-quality private schooling for students from pre-school through 8th grade. Benefitting from a strong curriculum and a devoted staff, Ascension School's students score well above average on standardized tests. In an effort to further strengthen the quality of the education provided, the school board hired a full-time director of development to focus on building new and sustainable revenue sources through fundraising activities. The initiative has been a great success. One beneficiary of the fundraising is a new professional development fund that offsets the cost of sending teachers to graduate school, raising the skill level of the staff and thereby the quality of the education students receive. The tool Ascension School relies on to help it with this important work is Sage Fundraising 50.

An Educated Approach To Fundraising

When Lynn Fredrick joined the staff of Ascension School as the director of development, the constituent database for fundraising was contained in a homegrown Access database. Fredrick soon realized this system was not going to be robust enough to accomplish the goals she had for increasing revenue and expanding the number of constituents donating to the school's programs. Tracking donations was manual and labor intensive, leaving less time to initiate new campaigns. Fredrick, with the help of the school board technology advisor and a school parent with a software background, selected Sage Fundraising 50 as the product best suited to Ascension School's needs. "We looked at a lot of different programs," Fredrick recalls, "and Sage Fundraising 50 was clearly the one best suited to our needs." As a one-person development department, Fredrick needed a software program that was easy to learn and use, yet powerful and flexible enough to allow her to do her job quickly and efficiently. "We saw a demonstration and knew right away it would fit the bill," Fredrick recalls. "And it was reasonably priced as well."

Another important factor was the availability of professional support. Sage Software offered the right support program for Ascension School's needs, and Fredrick is delighted with her support experiences. "Every time I call for support, I get a great response. I've not ever hesitated to call," says Fredrick. "And that's huge for somebody who's not an IT person."

Easy Learning Curve

Once the software was installed, Fredrick and her advisors were easily able to import constituent information from the old Access database. Fredrick also imported lists of current

Customer:

Ascension School

Industry:

Nonprofit Private Education

Location:

Oak Park, Illinois

Number of Locations: 1

Number of Employees: 50

System:

Sage Fundraising 50

CHALLENGE

A homegrown Access database was not up to the challenge of growing donations by strengthening relationships and running multiple campaigns and programs.

SOLUTION

Sage Fundraising 50 effectively tracks constituents, campaigns, and campaign results. The software is easy to learn, use, and maintain by one person.

RESULTS

Visibility into which campaigns produce the most donations allows the school to focus on activities that yield the best results. Additional funds are used for professional development funding for teachers and tuition assistance for needy students.

students and parents, to round out the constituent base. She is pleased with the feature that allows her to change the status from current student to alumnus with a couple of keystrokes. "I need something that is not too cumbersome," says Fredrick. "It is a priority to get as much information into the database as I can to get the reports I need, but I wear many other hats. I run the alumni programs, write a newsletter, oversee all fundraising events, work on the long range goals of the school and contribute to the Web site."

Fredrick uses the Relationship tab in Sage Fundraising 50 to track families. Maintaining the relationships between people makes it less likely Ascension School will lose track of anyone. If a solicitation flyer is returned with a bad mailing address, the new address can usually be traced through relatives in the system. "It's important that I trace incorrect addresses for myself, as well as the person who's here ten years from now," Fredrick explains.

Build A Constituent Base

Now that the system tracks each campaign and its results automatically, Ascension School is able to launch and manage many more campaigns than it could before. Before Sage Fundraising 50, the solicitation of alumni was manual and time-consuming and was limited to once a year on Grandparent's Day. With the automation Sage Fundraising 50 brings, Fredrick now has time to run multiple campaigns. And the school has access to detailed campaign results. For example, each mailing is now coded so the sources of contributions can be effectively tracked, allowing the school to focus its campaign efforts on activities that yield the best response. "We've got some alumni who will send us a check for \$100 every time they get a piece of mail," Fredrick says. "My primary responsibility is to see that the donor's intention is carried out. It's important to keep track of every gift, thank you, and contact. With Sage Fundraising 50, I can track it all."

Restricted gifts, where donors earmark their donations to specific activities or causes, are easily tracked within Sage Fundraising 50. A common restricted gift is one designated for the purchase of books in the library. To track the amounts used against this gift category, the library staff simply codes the purchase order to indicate the restricted gift is being used.

"My primary responsibility is to see that the donor's intention is carried out. With Sage Fundraising 50, I can track it all."

Ascension School is working to fill in large gaps in student information from the 1930s and 1940s. Fredrick is filling these in when she receives memorial gifts, and also by traveling to meet with alumni in different parts of the country. She can interview them about their memories and attach the audio recording of the interview to the constituent's record in the Sage Fundraising 50 software. She has also placed a list of missing alumni on the school's Web site, and has been able to reconnect with many people in this way. By building the constituent base, and tracking special and important details, Ascension School is better able to connect with potential donors and demonstrate the valuable service it is providing to families and the community. Using the detailed information being gathered in the software, Fredrick hopes to be in a position to print out family trees and display them at Ascension School's centennial celebration in 2012.

Knowledge Is Power

In addition to building and communicating with its constituent base, another important benefit of using the Sage Fundraising 50 solution lies in its flexible reporting engine. Fredrick produces monthly reports for the school board showing the source of new gifts and what types of programs donors are most interested in funding. For example, there has been a strong response to the student sponsorship program in which tuition assistance is provided to those in need. Ascension School hopes to expand this into a full traditional scholarship program. None of this would be possible, says Fredrick, without the software to manage the data and provide the reports that assist in decision-making.

Sage Fundraising 50 is earning high marks at Ascension School, for delivering the tools, the knowledge, and the power to build the school's development program into a resounding success.

ABOUT SAGE SOFTWARE

Sage Software supports the needs, challenges, and dreams of more than 2.7 million small and mid-sized business customers in North America through easy-to-use, scalable, and customizable software and services. Our products help manage a complete range of business functions including: accounting, operations, customer relationship management, human resources, time tracking, merchant services and the specialized needs of the construction, distribution, healthcare, manufacturing, nonprofit, and real estate industries.

