

SAGE MIP FUND ACCOUNTING

SAGE FUNDRAISING

CUSTOMER SUCCESS



United Way of the Capital Region gains efficiency with Sage MIP Fund Accounting

United Way of the Capital Region (UWCR) has been providing centralized fundraising and administration to charities in central Pennsylvania since 1921. In the wake of the terrorist attack on the World Trade Center, UWCR mobilized community support by creating a September 11th Fund-giving option where residents could contribute to those affected by the attacks. UWCR collected over \$400,000 and distributed 100 percent to the victims and their families. The organization has consistently exceeded its goals over the years, and in fiscal 2006 collected more than nine million dollars on behalf of participating charities. To efficiently track its fundraising efforts, UWCR relies on Sage MIP Fund Accounting and Sage Fundraising 100 - Rainbow Edition.

Simplify Complex Distributions

For an organization like UWCR, the process of collecting and distributing funds can be particularly complex. For example, workplace giving programs are most effective when employees are given the choice of donating directly or through a payroll deduction. UWCR needs to properly attribute all funds coming in from a particular workplace, regardless of the donation method, so that the total can be accurately reported to the corporate sponsor.

“Sage Fundraising provides a very flexible method of setting up account structures,” says Deanna Rayner, manager of financial services. “As long as we have associated the employee donor with the corporate sponsor, we can roll their contributions up no matter how the funds are received.” Additionally, donations can be grouped by type of industry, campaign year, or any other parameter UWCR determines will help it better understand donor giving patterns. And, armed with this information, campaign staff can create more effective campaigns.

Flexibility Ensures Compliance

UWCR also acts as processor for other United Way organizations, and runs campaigns both locally and nationally. This would not be possible without the flexible and powerful account structure options in Sage Fundraising.

The United Way of the Capital Region benefits from the well-known brand and logo of the United Way of America. On the other side of the coin, the organization must adhere to the standards of accountability set by the national organization.

Customer:

United Way of the Capital Region

Industry:

Charitable Fundraising

Location:

Enola, Pennsylvania

Number of Locations: 1

Number of Employees: 22

System:

- Sage MIP Fund Accounting
- Sage Fundraising 100 - Rainbow Edition

CHALLENGE

Complex hierarchies for collecting and distributing funds must be carefully managed to ensure that funds are distributed to the intended recipient. Campaign managers need quick visibility into the status of revenue and expense goals.

SOLUTION

Careful design of account structures in the Sage Fundraising and Sage MIP Fund Accounting software provides the ability to report on donations by any parameter that is required for overall accountability and the effectiveness of individual campaigns.

RESULTS

Financial reporting activities take 30% less time. Campaign managers can see just where they are with revenues and costs and are able to maximize campaign effectiveness.

With Sage Fundraising 100 - Rainbow Edition, UWCR can calculate and report the total amount raised each year, and assure that there is no double reporting of funds. The software prints the information needed, and makes it simple to fill out the report to be sent on to United Way of America.

Yearly Fundraising Results Up

Rayner estimates UWCR has increased funds raised by \$200,000 each year, in campaign revenue alone. Previously, campaign managers each kept their own mailing lists in various spreadsheets and databases. Now everything is in one database, making it much easier to keep mailing lists up-to-date. When mail comes back, the information only has to be updated in one place. Previously UWCR received hundreds of mailing pieces back annually, for which they not only paid the original postage but also the returned mail fee — having up-to-date mailing information has had a significant impact through savings.

Another aspect of Sage Fundraising that Rayner finds to be highly beneficial is the strong and active North American Rainbow User Group (NARUG). Not only has the user group provided Sage Software, Inc. with feedback which has been used effectively to enhance the software, but the group holds regular Web-based seminars allowing participants to share best practices in everything from processing payments to setting accountability standards.

Integrated Accounting

While Sage Fundraising was producing excellent results for UWCR, its old accounting system was not. Based on the great experience with Sage Software products, UWCR made the decision to implement Sage MIP Fund Accounting. Not only does this offer the convenience and assurance of working with the same software vendor for both products, transferring data between the systems is simple and dependable.

Sage MIP Fund Accounting provides a flexible General Ledger setup that complements the Sage Fundraising software account structure for easy reporting and reconciliation. Rayner particularly appreciates the reporting power. “In Sage MIP Fund Accounting we can tailor reports to track revenue and expenses all the way down to a specific event,” says Rayner. For example, UWCR staff can easily create a report showing the expenses and revenue

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sources, such as ticket sales or sponsorships, for an annual fundraising dinner. The campaign owners for the dinner can then see exactly where they are and what they need to focus on to maximize revenues, such as selling additional sponsorships or signing up more participants.

The reporting system works equally well for helping the campaign staff manage its costs. “Each budget owner can see precisely what they have spent, and exactly how much of their budget remains,” says Rayner.

The Gift of Time

Rayner reports that the system also provides an excellent audit trail. She can readily spot errors, or locate a missing payment if a grant is not tying out. And perhaps best of all, since implementing Sage MIP Fund Accounting, Rayner estimates staff members are spending 30 percent less time on accounting tasks. “Sage MIP Fund Accounting helps people be more effective in their jobs,” says Rayner.

UWCR prides itself on running effective fundraising campaigns, and making sure every dollar received is properly distributed to the intended recipient. The powerful combination of Sage Fundraising 100 - Rainbow Edition and Sage MIP Fund Accounting has helped United Way of the Capital Region increase their efficiency and reduce their administrative costs.

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.

