

Sage Nonprofit Solutions Help United Way Deliver “What Matters”

United Way of Berks County (UWBC), Pennsylvania, looked ahead and realized it had a problem. “We were using Windows-based software created for United Way groups, but it wasn’t meeting our strategic needs,” says Laura Mattern, CFO. “It was focused on the workplace rather than the donors, the exact opposite of where we wanted to go. We worried about its longterm stability. And data extraction and reporting were extremely difficult.”

With nearly 40 agency partners and many initiatives to manage, UWBC knew it was essential to get the most bang for their software buck. So they formed a crossfunctional team to do a product search, looking for broad capabilities, flexibility, and advanced tracking and reporting functions. “We selected Sage MIP Fund Accounting and Sage Fundraising 100 – Rainbow Edition because they offered an end-to-end solution that would serve us well into the future,” explains Monica Ruano-Wenrich, director of information management and services.

Rainbow Shines

UWBC now relies on Sage Fundraising 100 – Rainbow Edition as its fundraising management software. Written with input from United Ways across the country, the software helps agencies identify strategic donor relationships, analyze campaigns, track individual donor gifts in the workplace, manage donor choice designations, plan special events, control pledge payments,

coordinate direct marketing and solicitation, and produce a wide variety of reports. Using the software, agencies can better leverage resources for raising and distributing funds throughout their communities.

“About 96 percent of our revenue comes in through Sage Fundraising, whether it’s from pledges, planned giving, in-kind donations, or special events,” notes Mattern. “We use the transaction analysis function in Sage Fundraising to record and summarize income, and then send it to Sage MIP Fund Accounting through the GL interface.”



CUSTOMER

United Way of Berks County

INDUSTRY

Nonprofit agency

LOCATION

Reading, Pennsylvania

Number of Locations: One

Number of Employees: 31

SYSTEM

Sage MIP Fund Accounting

Sage Fundraising 100 – Rainbow Edition

Challenge

Although designed for United Way agencies, existing software did not meet agency’s long-term strategic needs nor did it allow the organization to be sufficiently donor-centric.

Solution

Sage Fundraising 100 – Rainbow Edition for agency-wide fundraising and data management, seamlessly integrated with Sage MIP Fund Accounting for all financial functions.

Results

Because data is entered once instead of twice, administrative workload is substantially reduced; time spent on acknowledgements and tax substantiation is significantly improved; and the agency increased its efficiency.

Strategic Management

The database in Sage Fundraising 100 – Rainbow Edition stores all fundraising information and other data for the agency. “It’s wonderful—and extremely efficient using a single database,” says Mattern. “Sage Fundraising records all types of information on our donors, volunteers, events, and fundraising activities, and allows us to use the standard reporting tools, as well as easily create customized reports as needed. It offers great flexibility.

“One of the best things about Sage Fundraising is that we have almost real-time data, available to anyone on the system,” adds Ruano-Wenrich. “This up-to-date information and retrieval flexibility lets us manage fundraising activities, and gives our campaign managers the ability to monitor progress. The result is that we are all more strategic in planning.”

Sage MIP Fund Accounting for Professional Accounting

Behind the scenes, Sage MIP Fund Accounting takes care of all of UWBC’s financial tracking needs, managing and reporting on funds from multiple sources across multiple budget periods. Sage MIP Fund Accounting features a robust table-driven chart of accounts and comprehensive reporting capabilities, and is customizable to a nonprofit’s unique requirements.

“Sage MIP Fund Accounting cuts checks and generates all of our financial statements,” notes Mattern. “It posts transactions and automatically distributes amounts to correct accounts and line items by either dollars or percentages. Its seamless integration with Sage Fundraising makes it an invaluable tool.”

Doing What Matters

UWBC says improvements since implementing Sage Fundraising 100 – Rainbow Edition and Sage MIP Fund Accounting have been dramatic. “Our administrative workload has been substantially reduced, because data is now entered only once,” says Mattern. “We now spend much less time on acknowledgements and tax substantiation. Overall, Sage MIP Fund Accounting and Sage Fundraising allow us to increase our efficiency .”

“... Sage MIP Fund Accounting and Sage Fundraising ... improve our effectiveness in fundraising management, donor management, and building customer relations. The products allow us to concentrate more resources on our core mission—to help people live better lives and strengthen the community—and that’s what matters.”

– Monica Ruano-Wenrich
Director of Information Management
and Services
United Way of Berks County

Ruano-Wenrich agrees. “We’ve been pleased with our decision in choosing Sage MIP Fund Accounting and Sage Fundraising, because they improve our effectiveness in fundraising management, donor management, and building customer relations. The products allow us to concentrate more resources on our core mission—to help people live better lives and strengthen the community—and that’s what matters.”