

Sage Software
Nonprofit Solutions
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The logo for Sage Software, featuring the word "sage" in a lowercase, sans-serif font with a stylized 'a' that has a dot above it, and the word "software" in a smaller, lowercase, sans-serif font directly below it.

SAGE FUNDRAISING

Solutions Overview



sage
software

SAGE FUNDRAISING

Helping Nonprofits Achieve Their Fundraising Goals Efficiently



With a growing chorus of voices vying for your donors' attention each day, increased scrutiny from local and federal governments, and the continuing challenge of balancing resources to meet campaign and program needs, professional fundraisers are under more pressure than ever. The Sage Fundraising product line offers the award-winning technology and services that your organization needs to ensure that you can stay on top in an evolving fundraising environment.

Sage Fundraising solutions were built from the ground up to help you improve...

- **Fundraising Program Effectiveness:** Develop and manage a variety of development programs to drive donor acquisition, development, retention, and recovery.
- **Administration and Management:** Streamline gift processing and acknowledgement processes, automate repetitive tasks, and organize staff duties to ensure timely follow-up for each critical activity.
- **Reporting and Analysis:** Demonstrate strong stewardship through flexible query and reporting tools to easily access and display the data you rely on to win donors and grants, satisfy funders, and communicate effectively to stakeholders.
- **Security and stewardship:** Protect financial and personal information through advanced technology and controlling levels of data access as appropriate.

Which solution is right for you?

Strong stewardship demands that every resource must be used at just the right capacity. Only Sage Software offers a range of solution options to help each organization fit its program and budget needs.

Sage Fundraising 50: Easy-to-use and affordable, with the tools to help nonprofits of all types and sizes manage their entire fundraising process.

Sage Fundraising 100: Core fundraising features and advanced functionality, including enhanced analysis tools and planned-giving management.

Sage Fundraising 100 – Rainbow Edition: Designed specifically for United Way affiliates to leverage the resources they use to raise and distribute funds.

Sage Endowment Management: Complete system to manage planned-giving vehicles and endowments, including a range of grant-making features.

Millennium: Web-centric design meets the needs of nonprofits and educational institutions with comprehensive fundraising programs.

Why is Sage Software the best option for nonprofits?

Experience and Dedication to the Nonprofit Sector

- Sage Fundraising and Sage MIP Fund Accounting software has been helping nonprofits for 25 years.
- We are the only global software company with a dedicated nonprofit division focused on building technology and providing support specifically to address the needs of nonprofits.
- We work through a network of local nonprofit financial management consultants and specialists to maintain a network of local relationships and services for our customers.

Programs to Meet the Needs of Nonprofits

- We offer 0% financing for nonprofits to purchase software and services.
- We offer an integrated product suite of financial, fundraising, and planned-giving software built to meet the need of nonprofits.

Unrivaled Financial Strength and Breadth

- More than 40,000 nonprofits in North America rely on a Sage Software product.
- More than 9,000 have chosen Sage Fundraising or Sage MIP Fund Accounting products.
- Sage is the 11th largest software company in the world, with more than five million customers, and more than 10,500 employees worldwide.

No other major software company has a focused division on nonprofits. No other nonprofit software vendor can match our product depth and financial strength. With Sage Software, you get the best of both worlds.



Fundraising Supporting Services

Technical Support: Each Sage Fundraising product is supported by live phone and Web support, as well as 24-hour searchable knowledge bases and user forums.

Diverse Training Options: We offer a wide range of training options to fit the needs of each nonprofit, including realtime, classroom, and custom training.

Consulting Services: Technical and subject experts can help you configure and optimize your fundraising system and data.

Data Correction Services: Optional subscription services provide regular updates to your important data, saving you wasted time and dollars. Subscribe to update information in a variety of areas, including:

- CorrectAddress which updates changes in U.S. zip codes and addresses
- CorrectCall, which updates area codes and phone numbers
- CorrectGM data enrichment service, which provides integration with HEP's matching gift database to help identify and increase gift-matching opportunities

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Sage Fundraising 50

Designed for ease-of-use and affordability, Sage Fundraising 50 continues to be the fundraising software solution that is easy to learn and use effectively, while keeping your total cost of ownership in check. From donor cultivation to event and volunteer management; recurring giving programs to total campaign and solicitation tracking and analysis, Sage Fundraising 50 offers a comprehensive set of tools to help nonprofits reach new heights in fundraising.

One Price for All Programs

An all-included system, with no additional modules to buy, Sage Fundraising 50 supports all core traditional fundraising tactics and other outreach programs. The program streamlines administrative processes, eliminates wasted time and money, and provides all the key tools to analyze and communicate your results.



Streamline Program Administration

Save time and money with Sage Fundraising 50 by managing all your programs in a single system and streamlining your daily processes:

- Manage the entire gift solicitation, entry, and acknowledgement process more efficiently.
- Reduce mailing costs by increasing accuracy and the ability to use strategic information.
- Synchronize daily tasks, calendars, and communications through integration with Microsoft Outlook.
- Integrate with Sage MIP Fund Accounting and most general ledgers to avoid duplication of data entry.
- Integrate with Sage Payment Solutions for seamless credit/debit and electronic check processing.

Sage Fundraising 50: Fundraising and Development Program Features	Core Benefit
Campaigns and Communications	3
Recurring Gift Management	3
Donor Profiling	3
Donor and Constituent Relationship Management (CRM)	3
Volunteer Profiling and Program Management	3
Membership Tracking and Management	3
Special Event and Seminar Management	3
Import Wizard	3
Online Fundraising Integration	3
Charts, Graphs, and Effective Report Development	3
Grant Management	3
Data Mining and Analysis	3
Security and Access Controls	3
Bank and Credit Card Processing	3

Simplicity with Strength: Easy to Load, Learn and Use

Sage Fundraising 50 was specifically designed to be easy to install, learn, and understand. This approach ensures that Sage Fundraising 50 clients will not have to spend a fortune on training and consulting each year or lose weeks of valuable time becoming effective.

An intuitive interface and built-in utilities minimize the learning curve, expedite repetitive daily tasks, and help you increase productivity:

- Simple to install and upgrade, keeping consulting fees in check.
- Intuitive interface and navigation shortcuts provide quick access to a range of information about each contact or program area.
- Built-in system help keeps new users learning fast.
- Recurring gift processing is secure and easy with optional integration to Sage Payment Solutions.
- The Quick Tool Set speeds a dozen different daily tasks including gift entry, e-mail list creation, printing, export to Excel, and more.
- The Import Wizard allows users to quickly and easily import data from third-party applications, list acquisitions, or other systems into Sage Fundraising 50.
- Relationship graph and color-coding capabilities let you easily see connections between constituents.



The screenshot displays the Sage Fundraising 50 software interface. The main window shows a contact record for Mrs. Tasha Abrams (ID 47). The record includes fields for Name, Address, Phone, Email, and various attributes like Gender, Marital Status, and Date of Birth. A yellow tooltip is visible over the 'Date of Birth' field, indicating a warning: 'This is a future date in the coming 10 based on window'.

At the bottom of the interface, there is a pie chart titled 'Gift Amount Giving by Purpose Pie Chart'. The chart shows the following distribution of gift amounts by purpose:

Purpose	Percentage
Unrestricted	32.70%
Student Scholarships	18.80%
Technology Upgrade	9.48%
Health Education	10.56%
Elderly Services	4.74%
Library Expansion	5.00%
Recycle Program	9.48%

Integrate all your Fundraising and Development Programs

Sage Fundraising 50 provides a full range of traditional fundraising and development functionality to build your contact list, retain and nurture your relationships, and increase your revenues.

Turn Prospects into Donors: Profiling, Campaign Targeting, Communications, and Results Analysis

Profiling: Track information about prospects and donors to facilitate relationship building and help identify commonalities in those who are connected within your organization. Create unlimited fields for the information you need most.

Campaign Targeting and Donor Acquisition: Query your profiles and results to prioritize your campaign resources and efforts. Target groups for your solicitations, track campaign success against dollar goals, and maximize the rate and level of your response.

Communications: Cultivate and motivate donors with a range of e-mail, mail merge, and other communication tools that work directly in the system. Target your e-mail lists and easily send customized bulk emails. Profiles automatically reflect and record all communications. Outlook integration and quick tools display your e-mail, calendar, and task lists, keeping your communications on track.

Results Analysis: Sage Fundraising 50 provides a real-time view of solicitations, campaigns, and funds. The system automatically calculates the cost-per-dollar raised and the net income of a particular solicitation.

Sage Fundraising 50 provides powerful fundraising without requiring a team of consultants or programmers.



Integrated Development Programs: Events, Memberships, Volunteers, and Grant and Sponsorship Proposals

Sage Fundraising 50 integrates support of traditional fundraising with your development programs. Volunteer profiling, membership tracking, special events management, and proposal tracking capabilities are all integrated. Robust functionality, including standard and customizable reports, are available for all these activities.

Events: Manage every aspect of your special events directly in Sage Fundraising 50. Create and send invitations, plan and manage logistics, track vendors and expenses, and monitor registrations and results for multiple events.

Volunteers: Build the profile that works for your organization. Monitor current assignments, track hours worked, and history of past involvement. Profile each volunteers, preferences, interests, and abilities. Sage Fundraising 50 automatically calculates total hour and value of donated time so that your volunteers can easily receive tax credit.

Memberships: Use the system to grow your membership, manage current members and programs, communicate renewal dates and reminders, and analyze membership trends.

Grant and Sponsorship Proposals: Track an unlimited number of proposals to a funding source. Track prospective corporate and foundation contributors, and highlight potential matching gifts.

Flexible Reporting: Query, Analyze, Design, and Communicate

You enter valuable information into your fundraising system each day. But that data is only helpful if you find, extract, and present it effectively. Sage Fundraising 50 gives you the tools needed to communicate your results and demonstrate good stewardship.



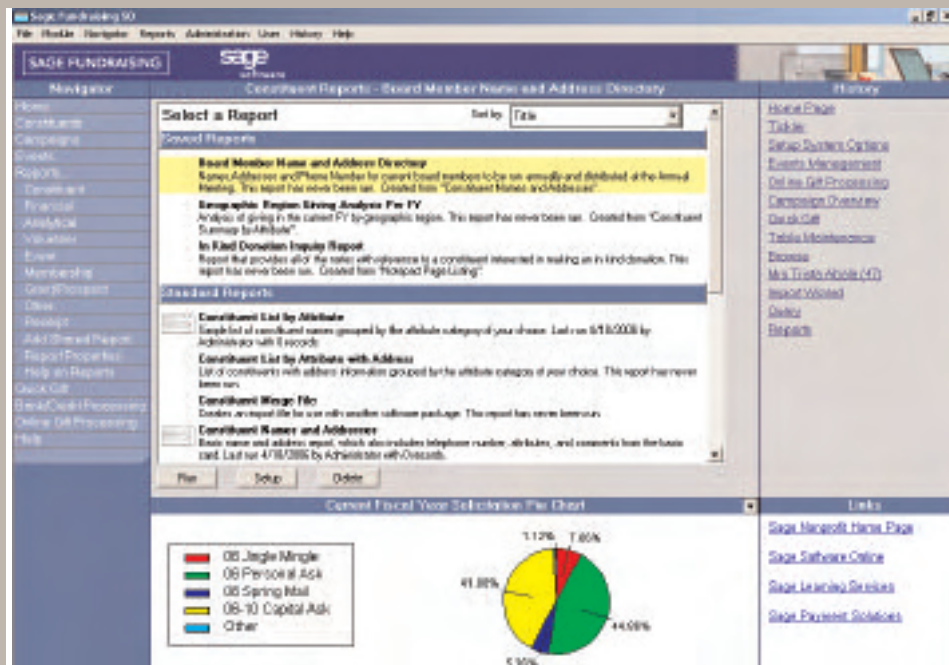
Query: Access precisely the information you need to make better decisions, or demonstrate results. Advanced search functions let you use any field or combination of fields in a profile for quick, sophisticated results.

Analyze and Design: Save time by adapting one of hundreds of standard reports for the most commonly needed information, including campaign progress reports, year-to-year comparative reports, cost-per-dollar raised performance reports, and outstanding pledge reports, and more.

Communicate: Easily share any news or reports with Outlook integration. Distribute pdf-formatted reports and information to with your donors, executives, board, or other stakeholders by e-mailing reports directly from the system.

"With Sage fundraising 50, we have automatic renewal data tracking and can approach people in a timely manner. This has been a huge boon for us in donor relations and overall stewardship"

Beth Colbert,
Development Officer
KCSM TV and FM



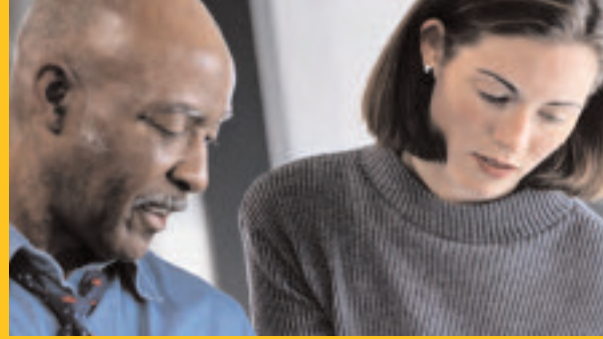
SAGE FUNDRAISING

Sage Fundraising 100

Sage Fundraising 100 provides the same range of integrated program tools of Sage Fundraising 50 and adds a deeper level of functionality to cultivate relationships, target communications, save resources with new efficiencies, and analyze results to deliver the communications and programs that build community loyalty and support.

Advanced Fundraising and Program Features

Sage Fundraising 100 is used by some of the most successful fundraising organizations in the world. Built for sophisticated fundraising organizations with mature development programs, Sage Fundraising 100 also provides a full suite of integrated modules with



in-depth features to provide comprehensive fundraising management. Sage Fundraising 100 provides particularly advanced functionality in several key areas:

- Deep data-mining and analysis tools for superior donor, prospect, and campaign targeting.
- Extensive Moves Management functionality.
- Management of complex planned-giving instruments and Endowment management.
- Full grant-making features track applications through multi-stage approvals and through disbursements.

Sage Fundraising 100: Fundraising and Development Program Features	Advanced Features
Campaigns and Communications	3
Recurring Gift Management	3
Donor Profiling	3
Donor and Constituent Relationship Management (CRM)	3
Volunteer Profiling and Program Management	3
Membership Tracking and Management	3
Special Event and Seminar Management	3
Online Fundraising Integration	3
Charts, Graphs, and Effective Report Development	3
Grant Management	3
Security and Access Controls	3
Data mining and Analysis	3
Planned Giving Instruments and Endowment Management	3
Tributes and Memorial Acknowledgements	3
Grant Making	3
Moves Management	3
Directed Giving Campaign Management	3



Data Mining and Analysis: Donors, Relationships, Campaigns, and Reports

Donors and Relationships: Take advantage of deep donor profiles, with full field queries. Far beyond traditional Customer Relationship Management (CRM), use Sage Fundraising 100 to leverage sophisticated donor relationship management capabilities by tracking, analyzing, and leveraging complex relationships between multiple constituents. Unearth new prospects with powerful prospecting tools and get quick insight into new fundraising opportunities.

Campaigns: From a single appeal through multiple campaigns, Sage Fundraising 100 provides a flexible communication and campaign management structure. It's never been easier to set up, track, and analyze campaign results. View campaign progress for a quick snapshot of where you are compared to where you want to be.

Reports: While Sage Fundraising 100 includes a vast library of standard reports designed to help you manage all aspects of your campaigns and operations, you don't have to be an expert to design and create custom reports in the system. The powerful, user-friendly data-mining and reporting tools give you access to every field in the database.

Extensive Contact and Moves Capabilities

Use the flexible Projects and Tasks module to plan and facilitate your contact and plan and manage your next moves. Set up unlimited models or templates with multiple steps and tasks to manage your goals for solicitation, stewardship, and volunteer activities.

Tributes, Planned-Giving, and Endowments

Beyond the capability of other systems, Sage Fundraising 100 gives you total flexibility to track all Honor and Memorial donations. You can easily set up a tribute for any individual or company and notify the appropriate party when the donation arrives. Tribute cards can be produced easily with full reporting of tribute activities.

In addition, manage the details of complex planned-giving instruments and manage endowment funds directly from Sage Fundraising 100. Complete integration provides instant access to endowment details and endowment-related grant transactions. Full security administration controls user and departmental access to endowment and donor information and includes user access controls for individual funds. Setup and manage rule establishment for asset pool tracking, contributions, disbursement, reporting and check processing, and more.

United Way needs Sage Fundraising 100 – Rainbow Edition

A special, customized version of Sage Fundraising 100 was built in conjunction with United Way to meet the needs of the organization affiliates. Get all the features and benefits of the standard product with additional built-in support for workplace campaigns and other key United Way fundraising initiatives and internal reporting with the customized fundraising product. If you are a United Way looking for Customer Relationship Management (CRM) for your organization, request a demonstration of the Rainbow Edition.

Grant Tracking: No one does it better

No other development system provides better grant-making capabilities. The supplemental Grant Management module is designed for agencies, federations, or foundations that process requests for funds and grant them to other organizations. Profile applicants and recipients, track applications through complex approval processes, set up and schedule grant disbursements.



Improve campaign results with better insight into your donors' favorite causes.

The Directed Giving Campaign module in Sage Fundraising 100 takes soliciting pledges and gifts for programs and purposes to the next level. Communicate directly with constituents about the issues and projects that are most important to them, then disburse directed funds to the programs effectively and efficiently.

Flexible Data Import and Export Capabilities

The flexible Sage Fundraising 100 Data Import Utility gives you the ability to import data directly into the system from external sources. With the ability to handle various types of source files, this utility allows you to add data or update existing information with ease. Effortlessly export data into various file types—including financial data into Sage MIP Fund Accounting—using a seamless, accurate process.

The screenshot displays the Sage Fundraising 100 software interface. The main window shows a donor profile for Mr. Theodore Beckitt (1139) with contact information and a list of giving activities. A 'Pledges' window is open, showing a table of financial data for the donor.

Date	Campaign / Year	Amount	Recognition Amount	Balance	Posted
12/01/2005	Y20 / 2005	1,800.00	1,800.00	0.00	0.00
12/01/2005	ANN / 2005	658.00	658.00	658.00	0.00
12/01/2005	ANN / 2005	555.00	555.00	555.00	0.00
12/01/2005	ANN / 2005	608.00	608.00	0.00	0.00
11/05/2005	EVENT / 2004 / DPHEN	22.00	22.00	22.00	0.00
11/05/2005	GEN / 2005	22.00	22.00	22.00	0.00
11/05/2005	ANN / 2005 / DM	10,808.00	10,808.00	6,808.00	0.00
11/02/2005	ANN / 2005	508.00	508.00	508.00	0.00
10/25/2005	ANN / 2005 / OTHER	1,208.00	1,208.00	0.00	0.00
02/14/2005	52 / 2005	555.00	555.00	455.00	0.00
02/14/2005	ANN / 2004 / FTBL	202.00	202.00	0.00	0.00
02/14/2005	ANN / 2004 / DM	108.00	108.00	108.00	0.00
02/14/2005	52 / 2004 / FTBL	1,708.00	1,708.00	0.00	0.00

Totals: Amount 21,281.00 Balance 4,382.00 PostDate 0.00 Credit Amount 21,704.00

SAGE FUNDRAISING

Sage Endowment Management

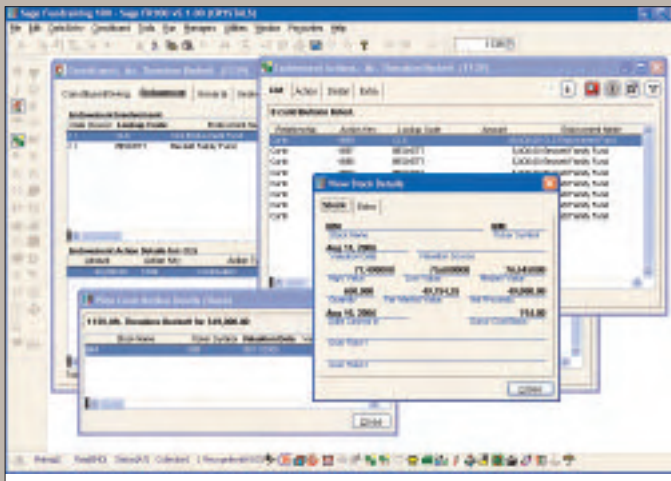
No other software product offers the complete integration of accounting, traditional fundraising, and planned-giving prospecting and management as Sage Endowment Management. Available as a standalone or fully integrated Sage Fundraising 100 module, this planned giving and endowment management tool lets foundations, federations, and other fundraising organizations instantly access financial data and other details in a variety of views.



With Sage Endowment Management software, your organization can manage complex details and disbursements of multiple planned giving instruments, in a single, unified solution. Administer, review, and manage the details of Philanthropic Funds, Donor Advised Funds, Charitable Remainder Trusts, Charitable Gift Annuities, and other popular solutions. With Sage Endowment Management software, grant-making organizations can track and process proposals or applications for funds and grant funds to other organizations.

With Sage Endowment Management and grant management software, your organization can:

- Facilitate strategies for planned-giving solicitation to maximize fundraising success.
- Track and manage all endowment actions effectively, recording each disbursement, fee, contribution, and adjustment in detail.
- Streamline detailed distribution and operational processes.
- Automate communication with donors and sponsors.
- Track and manage the general ledger accounts associated with each fund.
- Maintain separate accounts for the principle and interest portions of the fund.
- Design grant-proposal review workflow.
- Manage grant proposals from initial submission through funding.



SAGE FUNDRAISING

Millennium

Millennium is the award-winning Web-based fundraising software for large organizations that demand advanced fundraising and reporting customization. With advanced remote access, PDA and executive tools, and unrivaled flexibility, Millennium remains the best solution to help schools, foundations, and other fundraising organizations transform volumes of information into solid relationships and increased donations.

"Millennium serves as our institutional memory. The software does the science, and lets the development team handle the art of fundraising."

— Bonnie Lightcap
 Director of Advancement Services
 Hood College



Millennium, the Web-based fundraising application by Sage Software, authorizes users to navigate and manage a wide range of donor and prospect management information as easily as visiting a Web site. The result of 30 years, experience working with diverse and sophisticated development operations, Millennium organizes your vast information into numerous "Worlds," each providing easy access and management through a browser interface.

Millennium Worlds catalog your integrated data into easy-to-manage areas. Worlds focus areas include Profiles, Events, Executive Information System (EIS), Reporting, and Tools.

Millennium: Fundraising and Development Program Features	Web-Based
Campaigns and Communications	3
Recurring Gift Management	3
Donor Profiling	3
Donor and Constituent Relationship Management (CRM)	3
Volunteer Profiling and Program Management	3
Membership Tracking and Management	3
Special Event and Seminar Management	3
Online Fundraising Integration	3
Charts, Graphs and Effective Report Development	3
Grant Management	3
Security and Access Controls	3
Data mining and Analysis	3
Planned Giving Instruments and Endowment Management	3
Tributes and Memorial Acknowledgements	3
Grant Making	3
Moves Management	3
PDA Executive Tools	3
Online Communities	3

Profiles World

The Profiles World allows you to access, view, and maintain highly detailed information about each individual, foundation, or other organization in your database, as well as their giving and participation histories. In addition, it features the unrivaled prospecting technology—dynamic “relationship trees” of Millennium—to enable development directors to find and leverage the connections between constituents.



Biographical Profiles

- Names and addresses
- Hyperlink to e-mail and Web addresses
- Education
- Employment history
- Relationships to other constituents
- Dynamic relationship trees for tracking Complex relationships
- Event attendance history

Corporate and Foundation Profiles

Financial: Track net worth, sales, profits, contributions for corporations or for foundations, grants, and expenditures.

Structure: Track parent companies, subsidiaries, employee counts, and corporate relationships.

Gift Processing

- Summarized and detailed giving history
- Automatic posting and tracking of matching pledges, potentials, joint, soft credit, and memorial or honor transactions.
- Flexible pledge billing
- Graphical giving trends
- Complies with all FASB, IRS, and CASE reporting standards

Membership

Millennium features an integrated membership system with the ability to track annual and life memberships with multiple membership classifications. Easily record and manage benefits and subscriptions.

Flexible Campaign and Prospect Management

Increase your productivity through powerful, flexible campaign tracking features.

- Prospect demographics provide research status, ratings, financials, giving interests, management relationships, and demographic ratings.
- Also features contact management, proposals and deferred giving, and campaign screening sessions.

Millennium integrates basic database information with linked research files, contact reports, press clippings, and other pertinent information to create multi-dimensional prospect profiles.



Events World

A comprehensive planning tool from initial invitation down to complex seating chart managements, Millennium's Events World lets you plan and manage multiple special events sponsored by your institution with the details of each overall activity, activities within the event, and each constituent's participation.

EIS World (Executive Information System)

Designed to give sophisticated advancement professionals the real tools they need to make complex decisions, Millennium provides graphical overviews of campaigns and other aspects of the fundraising and stewardship effort, helping busy executives analyze and present the big picture with versatile drill-down capabilities.

Reporting World

The point-and-click reporting interface of Millennium simplifies query-building, eliminating the need to know technical field names. The system includes more than 250 ready-to-use reports and uses Crystal Decisions for more complex reports covering all areas of your fundraising program.

Millennium Executive IDEA License

This customizable remote access license provides the wealth of access and mobility tools that active development officers need. IDEA integrates third-party tools into the Millennium interface, providing executives with reliable, customizable, easy-to-use data access.

Wireless Access: Take your fundraising database wherever you go—access data with any PDA with wireless Palm OS® or PocketPC access.

Easy Ask: No Crystal expert required! Now you can ask questions in plain English. You don't have to be a database expert to query the system for time-critical information.

Analytical Reports: Get a better picture of demographics and campaigns as you analyze data from different perspectives.

Data Mapping: Make more informed event planning and other decisions with this powerful tool that lets you isolate demographic or giving statistics and identify prospects geographically.

"We completed the cut-over of Gift Processing two weeks ahead of schedule at the height of our busy season... Millennium enabled us to move to the next level of fundraising."

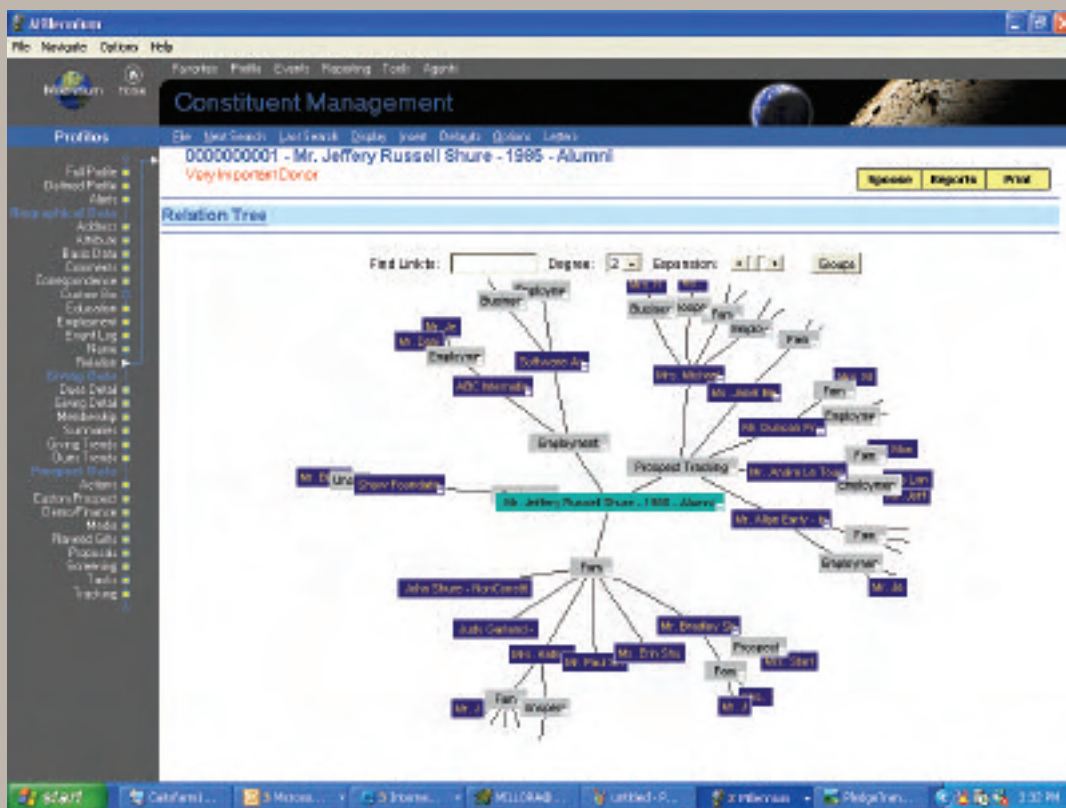
*David Silver,
Director of Advancement Services,
Catholic University of America*

High-performance Technology and Security

Millennium gives you the flexibility to use the technology that you prefer—Choose Microsoft SQL Server or Oracle® as your database engine. Millennium data is compatible with many industry-standard systems and software tools. Designed to support multiple processors and servers, Millennium meets every performance need. Millennium also provides the most laser-sharp security access controls available. Customize various levels of security by field or value within a record, or even by the value of the field in a related record.

Online Communities and Communications

Stay connected to your constituency via the Internet through an online directory or portal. Millennium lets you choose the hosting technology you prefer to provide your constituents, featuring select data directly from Millennium. Alumni or members can update their own contact information, volunteers can see new schedules and opportunities. You can accept online donations, publish reports for select groups, and build your community with your key news and messages!



Sage Nonprofit Solutions

For more than 20 years, nonprofits have trusted Sage Software solutions to help their organizations raise and manage their funds. Now more than 40,000 nonprofits use products from the Sage family. This global strength fosters continual product and program improvements, allowing us to offer our nonprofit customers unrivaled choice, quality, and more value for their software and service dollar. To learn more about Sage Nonprofit Solutions, or to review our complete line of nonprofit management products, visit www.sagenonprofit.com.