donorperfect

COMMUNITY CONFERENCE SPARK

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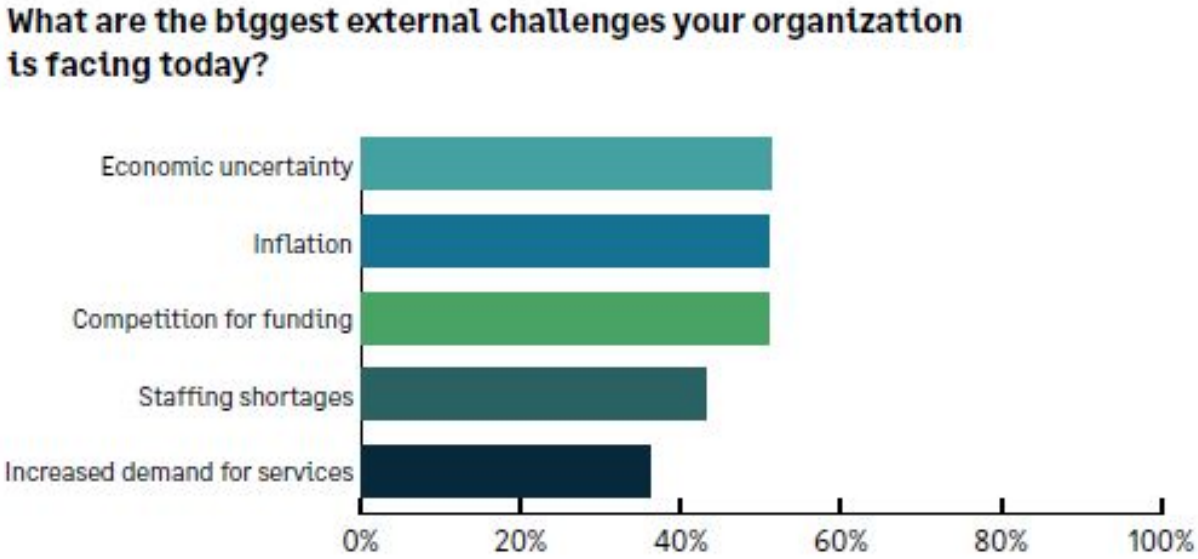
Spark Synergy: Aligning Fundraising and Finance to Ignite Mission Impact

Topics we'll cover today include…

- Spark Exploration
- Spark Efficiency
- Spark Insight
- Spark Opportunity
- Spark Success
- Spark Action
- Q&A

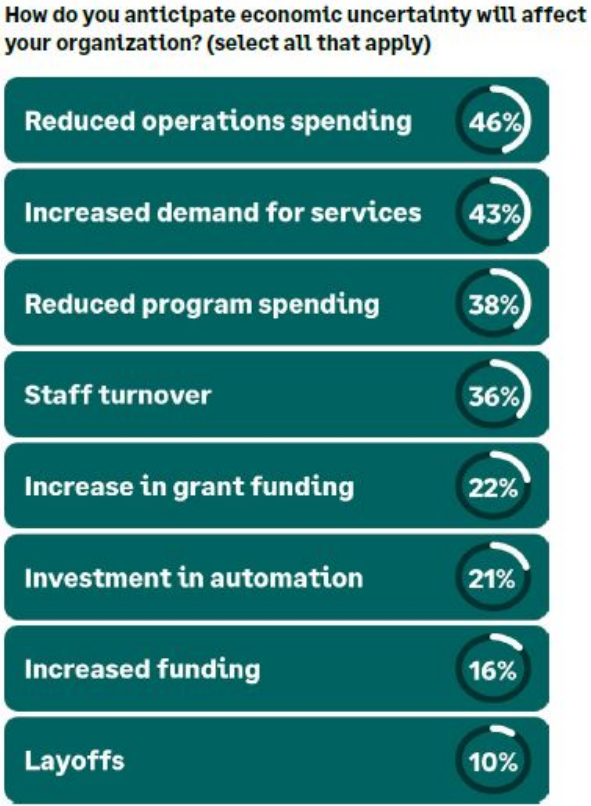
Spark exploration: Defining the problem

Biggest external challenges nonprofits face today



Source: 2024 Nonprofit Technology Trends Report, Sage

Biggest external challenges nonprofits face today



Source: 2024 Nonprofit Technology Trends Report, Sage

Biggest internal challenges nonprofits face today

Source: 2024 Nonprofit Technology Trends Report, Sage

Operating with siloed systems leads to…

- Restricted visibility into organizational performance
- Hindered team collaboration, decision-making, and strategic planning
- Duplication of effort and potential for mistakes
- Missed opportunities to optimize resources
- Disjointed communication with donors
- Growth and scalability challenges

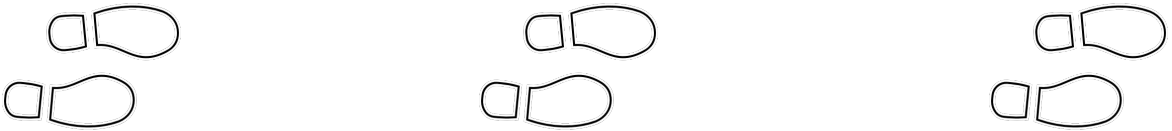
Hang up the “Nike Network”

Fundraising system

Financial system

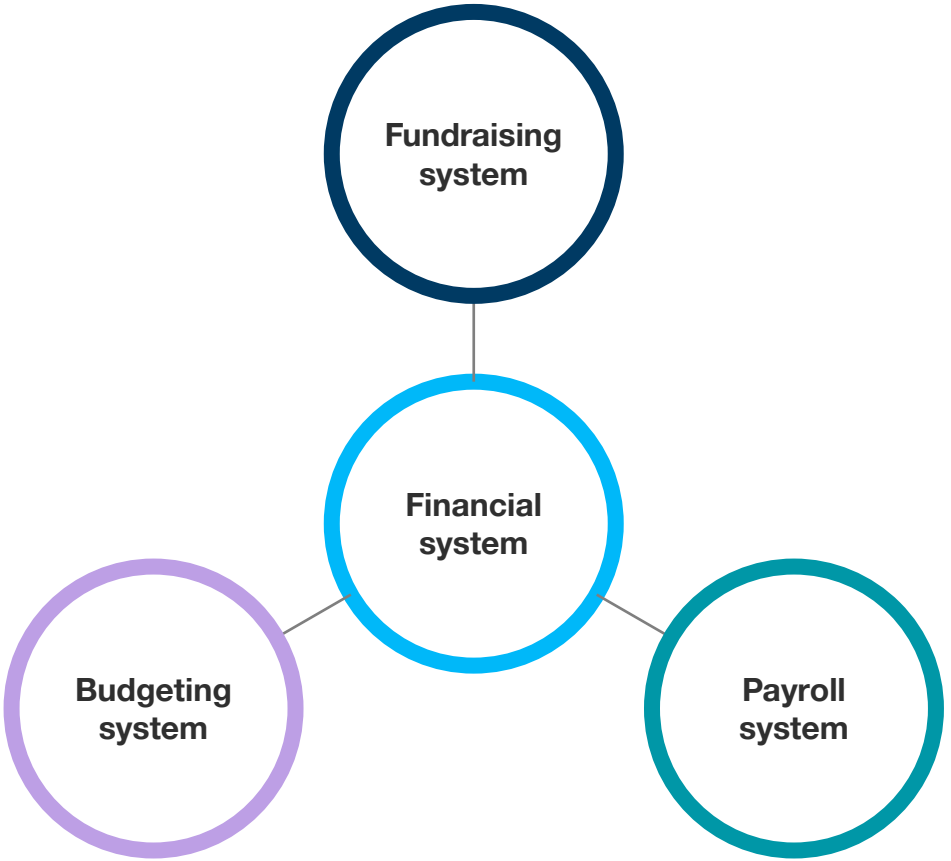
Payroll system

Budgeting system



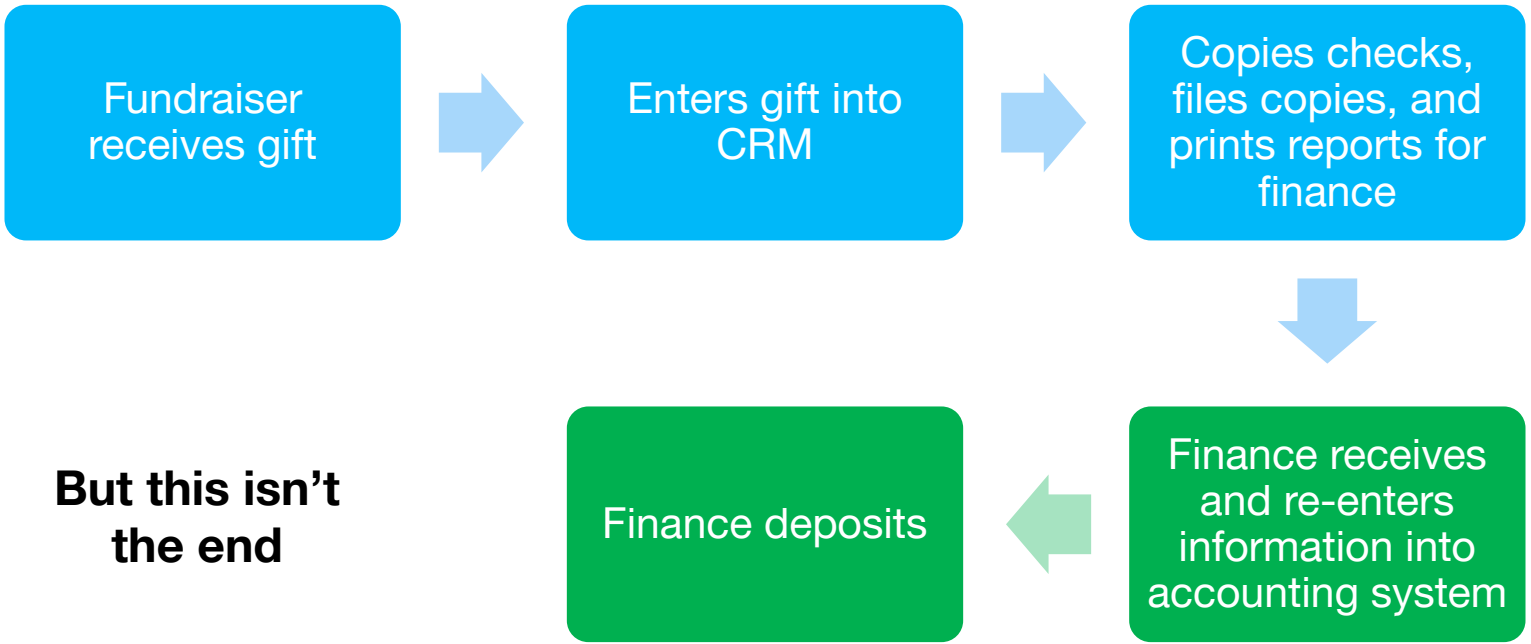
The ideal state

Connected systems for real-time data sharing, workflows, collaboration, reporting, and visibility



Spark efficiency: Eliminate manual tasks and data discrepancies for greater mission impact

How gift processing works at many organizations



But this isn't the end

Connected systems = less pain + a more consistent picture

Development Office

- Associate gifts to accounts, campaigns, funds, etc.
- View event expenses
- Controlled posting to GL
- **View Accountability Summaries and Cost Analysis**
- **Configure combined data dashboard**

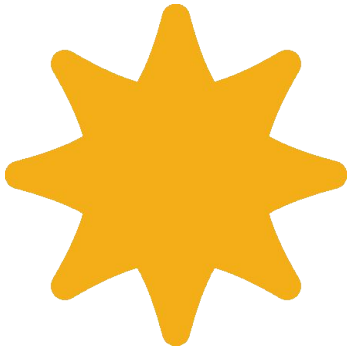
Finance Office

- View gifts
- No gift data entry
- Automate data-flow
- **View Accountability Summaries and Cost Analysis**
- **Configure combined data dashboard**

Benefits of connecting your fundraising and accounting system

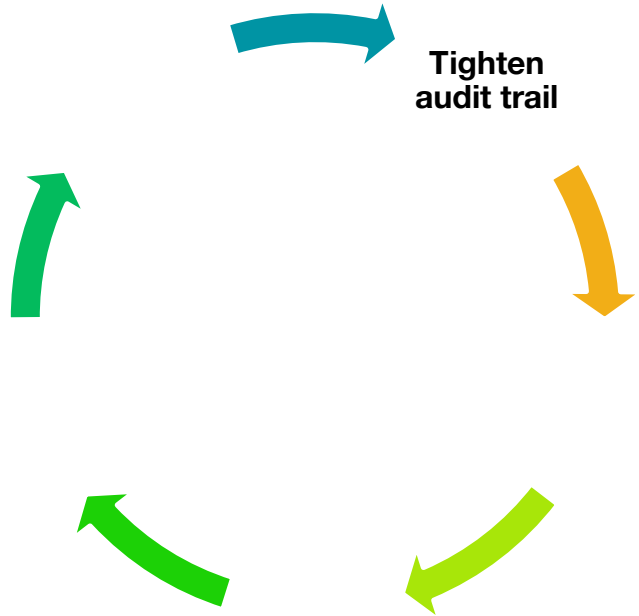
- Streamlines communication and ensures consistency and accuracy across teams
- Reduces time spent on reconciliation and improves reporting
- Automates data flow to eliminate manual entry and errors
- Allows staff to focus on high-impact activities
- Increased donor stewardship[

dp CommunityConference

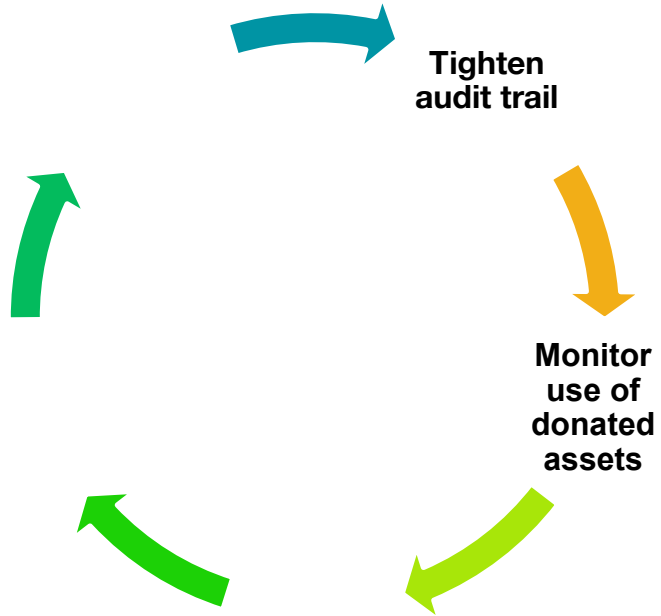


Spark insight: Gain a 360-degree view of your nonprofit financial health

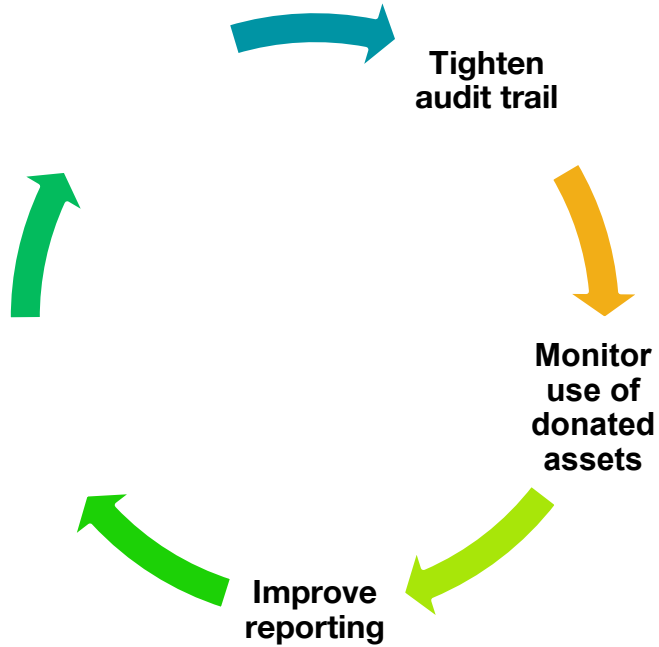
360-degree view of nonprofit financial health



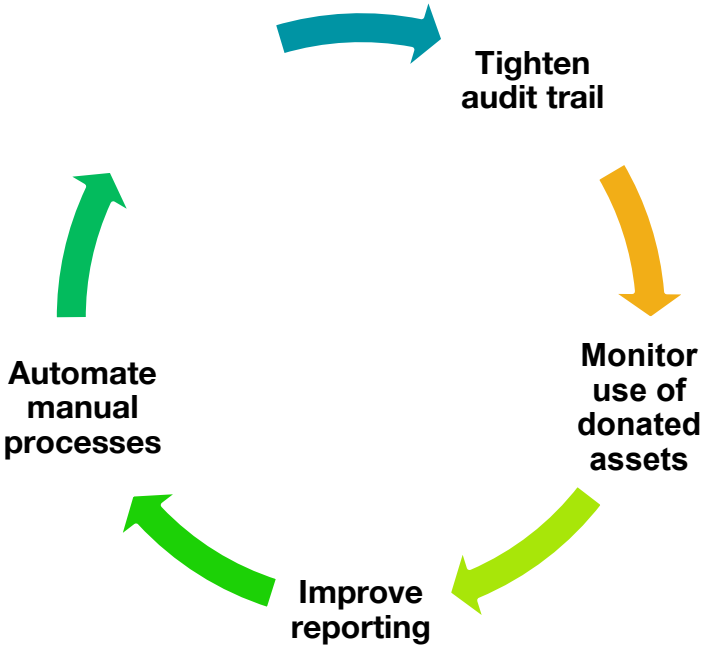
360-degree view of nonprofit financial health



360-degree view of nonprofit financial health



360-degree view of nonprofit financial health



360-degree view of nonprofit financial health

Spark opportunity: Unleash your nonprofit’s potential

Are you ready to ignite...

EFFICIENCY

VISIBILITY

COLLABORATION

IMPACT

Sage Intacct and DonorPerfect
together for good

Connecting

Best-in-class donor management with DonorPerfect

with

Best-in-class nonprofit accounting with Sage Intacct

Sage Intacct Fundraising powered by DonorPerfect

Bringing the best of Fundraising and Finance together

Sage Intacct Fundraising powered by DonorPerfect

- ✔ Configurable fundraising & donor management system
- ✔ Integrated donation and volunteer forms
- ✔ Donor portals
- ✔ Integrated payment processing
- ✔ Digital wallet donations
- ✔ Receipting and acknowledgements
- ✔ Mobile app for android and iOS
- ✔ Enterprise event management
- ✔ Crowdfunding
- ✔ Automated alerts and tasks
- ✔ Comprehensive reporting and dashboard analytics

Sage Intacct Nonprofit Accounting and Financial Management Software

- ✔ Intuitive fund accounting (AP, AR, cash management, dimensional GL, order management, purchasing)
- ✔ Allocations management
- ✔ Budgeting and planning
- ✔ Fixed assets
- ✔ Grant tracking and billing
- ✔ Inventory management
- ✔ Multi-entity and global consolidations
- ✔ Revenue recognition
- ✔ Spend management
- ✔ Time and expense management
- ✔ Vendor payment services
- ✔ Comprehensive reporting and dashboard analytics

Benefits to you

Sage Intacct Fundraising powered by DonorPerfect

- Stronger donor connections, reduced turnover
- Increased strategic decision-making
- Free up valuable time for staff to focus on donor engagement

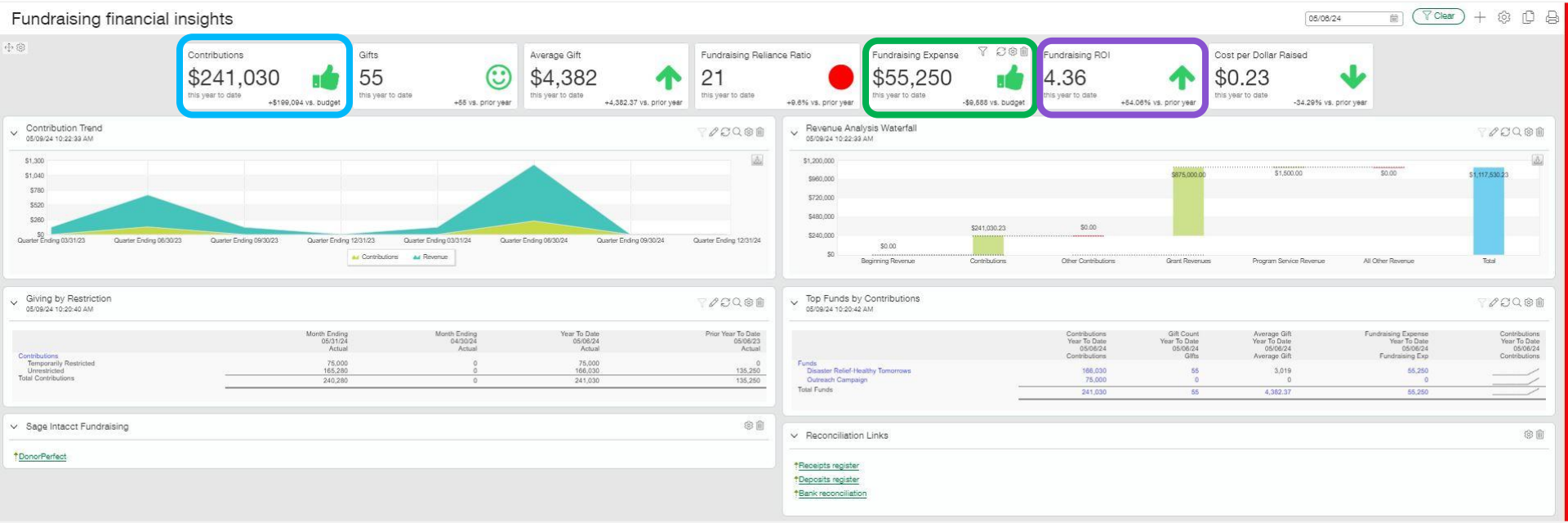
Sage Intacct Nonprofit Accounting Solution

- Maximize stewardship by automating grant, fund, and donor accounting
- Ensure control and compliance and reduce risk and cost
- Accurate, timely data for data-driven decisions
- A complete view of your data in one place

One cohesive fundraising and financial management system

- Seamless, real-time data flow between systems
- 360-degree visibility into revenue, cash flow, and expenses
- Make data-driven decisions to maximize your impact
- Improve collaboration between finance and development teams

Fundraising financial insights all in one view



You're in good hands

Why DonorPerfect?

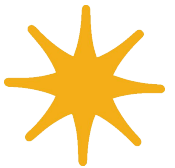
The #1 Cloud Fundraising System

- Rated #1 for overall value
- Most awarded nonprofit CRM since 2009
- Over $300B raised since launch
- 10,000+ nonprofit customers of all sizes and sectors
- 93% customer retention rate and A+ rating with the BBB

Why Sage Intacct?

The #1 Nonprofit Cloud Accounting System

- Built by Finance experts for Finance professionals
- Rated #1 in customer satisfaction (98% satisfaction rating) on G2
- The first and only preferred provider of the AICPA
- Undisputed leader in innovation, recognized by industry analysts



Are you ready to ignite...

EFFICIENCY

VISIBILITY

COLLABORATION

IMPACT

Spark success: Brevard Zoo aligns fundraising and finance

BREVARD ZOO

Challenges

- Struggled to keep up with rapid growth
- Duplicate data entry
- Excel workarounds required to present data to executives
- Fundraising system and financial system not integrated
- Lack of real-time visibility across the organization

Solution

- Implemented Sage Intacct and connected it to DonorPerfect for improved data accuracy and efficiency
- Gained real-time visibility into financial and operational data such as revenue per guest for each service
- Finance can automatically pull individual transactions from DonorPerfect
- Department managers can plan more accurately with improved reporting

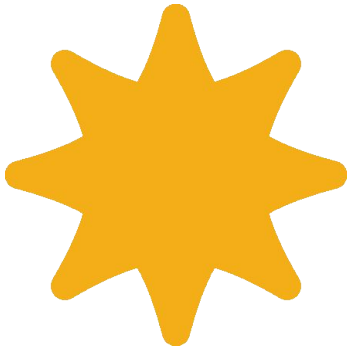
50% FASTER
financial reporting

50% IMPROVEMENT
in data accuracy

30% INCREASE
in efficiency

*"We monitor daily attendance from our members and the general public and love that we can now marry the zoo's financial information with these numbers. As a result, **we can react quickly versus waiting until month-end** to see if attendance makeup, food sales per capita, or other trends are out of their normal range."*

Frank Fieseler, CFO & COO



Spark action: Next steps

Your next steps

1. **Visit** the Sage booth at the virtual exhibit hall and talk to an expert
2. **Schedule** a personalized demo and impact assessment
3. **Spark** a conversation with your colleagues

Q&A

Feel free to ask me anything.

Thank you

Enjoy the rest of the conference.