



Improve your fundraising processes to impact your results

**Our Fundraising solutions can
provide a system that is robust
enough to support the mission
of your complex fundraising
organization**



Our Fundraising solutions have two tiers to choose from with the option to add additional features to fit your business needs:

FEATURE	BASIC	ADVANCED
<p>Fundraising app and home page Centralized home for all fundraising staff to easily access their most important work</p>	✓	✓
<p>Custom app and home page</p>		✓
<p>Constituent management Manage constituent data and relationships</p>	✓	✓ (More customizations offered in Tier 2)
<p>Donation management End-to-end processing of donations, major gifts, matching gifts, in-kind gifts, and recurring donations. Manage third party gifts, anonymous gifts, tributes, payments and refunds, and fund allocations</p>	✓	✓
<p>Custom donation types Management of custom donation types used by your organization such as planned giving</p>		✓ (up to 2)
<p>Inbound grant management Deliverable and task management Grant opportunity reporting</p>	✓	✓ (More customizations offered in Tier 2)
<p>Donor/moves management Manage your portfolio of donors with features such as donor status and level indicators, consolidated giving history, and system emails. Track your most important gifts through your customized stages of solicitation. Track and view a timeline showing your meetings, tasks, and communications with each donor</p>	✓	✓ (More customizations offered in Tier 2)
<p>Single and batch gift entry Easily enter gifts as you receive them, either singly or in batches</p>	✓	✓ (More customizations offered in Tier 2)

FEATURE	BASIC	ADVANCED
Appeal management Manage your full campaign process and capture your ROI for each appeal or campaign. Track the constituents and donations as they relate to each appeal	✓	✓
Fundraising operations reports and dashboard Centralized home for your reporting needs	✓	✓
Development operations reports and dashboard Action based home base to help your development operations team stay on top of their tasks	✓	✓
Customized reports and dashboard		✓
Accounting Reconciliation reporting Access a report to reconcile your donation information with your accounting system		✓
Document Merge functionality Merge Salesforce information to create documents such as donor acknowledgements or gift summary statements.		✓
Task and activity management and tracking Track your future and past activities and communications with your constituents	✓	✓
File management Store files directly in Salesforce attached to the record where you need them most	✓	✓
Link to files stored outside of Salesforce (ex. google drive, sharepoint)		✓
Organizational branding of your Salesforce instance	✓	✓
UI/UX Configuration Easy and intuitive navigation	✓	✓
User Access Configuration Determine who can access what data in your system	✓	✓ (More customizations offered in Tier 2)

FUNDRAISING SOLUTION ADD ONS

Pick and choose from our add ons to further extend and customize your fundraising solution

Custom giving pages and payment processing:
FormAssembly and Stripe Integration

Custom giving pages and payment processing:
FormAssembly and Chargent Integration

Giving page integration

Accounting Subledger configuration

Accounting system integration

Wealth tracking tool integration (ex. iWave,
WealthEngine)

Address verification integration

Public Media Fundraising

eSignature

Document Generation

Event Management

Data migration

Additional integrations as needed

Additional custom portals as needed

Marketing integration with MailChimp or Constant
Contact

Outlook/Gmail integration

Form creation and integration (FormAssembly)

Following the implementation of one of our Fundraising solutions, your organization should see the following improvements:

- +** Task management is more streamlined and aligns with progress towards fundraising goals
- +** Donor and gift management is personalized and more automated (if preferred) to allow for more time cultivating donors
- +** Reports and dashboards are improved through better customizations, cloud-based mobile access, and options to receive subscriptions to your favorite dashboards to get updates right in your inbox
- +** Campaigns can track return on investment at a glance and see which appeals are having the biggest impact
- +** Overall minimization of administrative time and manual tasks
- +** Every user has personalized access to the system, and it is set up for them to accomplish their work and goals

Raising the funds needed to support the mission of your organization is no simple task. Between writing grants, meeting with donors, planning events, and more, you need a database that is going to keep up with all of the information you are gathering on your donors and their engagements with your organization.

With our Fundraising solutions, we ensure that we are taking the time to fully understand your processes and goals to make a solution that is flexible enough to track the data points that are important to you and allow you to report that data back the way that your stakeholders need to see it.

MEET BUILDING YOUTH

Building Youth is a fictional nonprofit organization based off of past Redpath clients and experiences. A Minneapolis-based company, they have a hardworking staff who provide services to youth in their community at risk for dropping out of high school, with a goal of seeing every youth they work with graduate.

Building Youth met Redpath when they were looking to make a change in the technology they were using to do their fundraising work. Building Youth had a small but mighty team of fundraising experts who were supporting their mission by raising the funds needed. Their team was always busy writing grants, entering gifts, planning fundraising events, building relationships with donors, and ensuring that they were on track to meet their goals. But they knew they could be doing so much more if their technology wasn't slowing them down.



Managing complex work with an outdated system

The team had been doing their best to manage their complex work using an outdated system that worked well ten years ago when they first adopted it, but no longer served them well. Data entry was slow, they'd patched together workarounds in their inflexible system, and they dreaded their monthly board meetings when they were tasked with pulling together reports. It took three days just to pull together the information needed for those meetings each month.

Acknowledging their dedicated group of donors was a manual process and they often fell behind, losing an opportunity to let their donors know how important they are. Their system didn't have a good mobile interface, so when they were out in the community meeting with donors, they had no way to get the personal information they needed or enter notes after a meeting and the number of siloed systems and spreadsheets they were using to do their work was dizzying. They decided it was time to invest in their fundraising team and let their technology start working for them instead of against them.

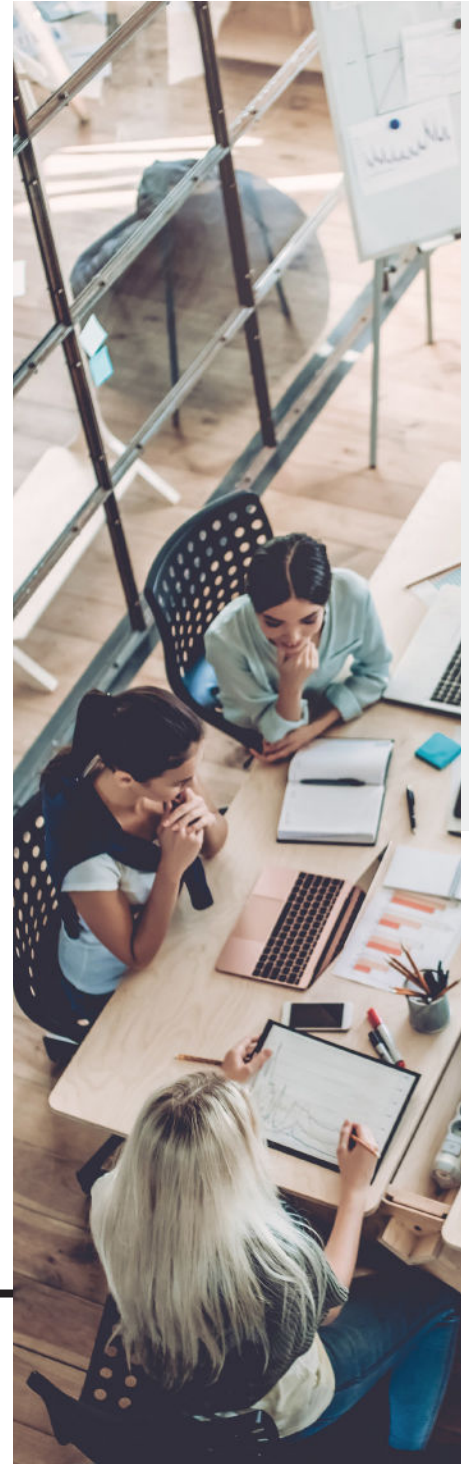
Finding the path forward

Building Youth met with Redpath Consulting Group, and together they built a plan that would allow their technology to support the great work that their fundraising team was already doing so that they could focus more time and energy on the high impact activities that better supported their mission.

After listening to the needs of the Building Youth team, Redpath and Building Youth aligned on a plan to utilize Redpath's Advanced Fundraising solution. In addition, some of the add-on customizations addressed needs they were looking for, such as integrations with their online giving platform as well as their wealth tracking tool so that their fundraising team could have all of the information they needed in one cloud based, mobile friendly, and intuitive system: Salesforce.

Through the discovery process, the Redpath consulting team learned about the processes of their various team members, as well as their dreams for the ways in which their new system would help build stronger relationships with their donors to raise more funds for their mission.

As their system came to life, their teams were continually invited to play in the system, ask questions, and offer feedback. While beginning to work within a new system is always hard and a bit scary, their training helped them feel confident that they could do the work they needed to do, even on day one.





Reaching goals

Now, the Building Youth team is on their way to hitting their fundraising goals. Every day, when they log in, they can easily see the tasks that they need to accomplish that day and view their progress toward their goals.

As gifts come in, their gift entry team can enter them into Salesforce quickly as a single gift or in a batch, and gifts that come through their online giving page are automatically synced to Salesforce with all of the information the team needs. As the gifts are entered, personalized acknowledgements are automatically sent via email and logged to their record allowing them to spend more time where it matters - cultivating donors. They have a dashboard to manage their portfolio of donors, tracking their expected gifts and the tasks and activities they are doing everyday as they build those strong relationships. They can even access all of this information from their mobile phone.

Board meetings are now a breeze. Reports are always at the ready with live and accurate information. Their executive team can even subscribe to their favorite reports and dashboards to receive the most important information right in their inbox. And it's easy to keep data up to date.

Their marketing team is happy too as they can now use campaigns to see at a glance which appeals are having the biggest impact.



The biggest impact is felt by the youth they serve.

Because their fundraising team can easily see what campaigns have had the greatest impact and increase those activities, and they've transferred hours of administrative time each week to time spent cultivating donors, they've been able to raise more funds and help more young people stay in school, making their community a better place for all.

“The Redpath team was incredibly helpful and efficient in developing a solution for my organization. They took the time to understand our objectives and built a solution that addressed all of our needs. They were flexible and collaborative throughout the project. I look forward to an opportunity to work together in the future.”



PROCESS WORKING WITH REDPATH

Plan & Architect

Your subject matter experts (SMEs) will engage in a variety of discovery sessions with your Redpath team as we seek to understand all of your processes and system related needs. A solution design, along with a set of user stories, will be presented to your team at the end of the Architect phase for alignment and approval.



Validate Phase

When your Construct Phase is complete, Redpath will guide your Super Users through a series of training sessions and testing scenarios to validate that your system is functioning as expected. When all functionality has been approved, deployment begins.



Construct Phase

Your Redpath team will begin building your system in a sandbox to meet your requirements. Your build will happen through a series of 2-3 week sprints after which your Super Users and SMEs will have an opportunity to view a demonstration of your new functionality and perform a series of tests in a sandbox to gain alignment.



Deploy & Support

During this final phase of your project, your Redpath team will move all of your custom functionality to your production environment and perform a series of final tests. If a data migration is included in your project, this is also where all of your data will be migrated to its new home in Salesforce. During this time, your Super Users will be training your internal teams in preparation for go-live day. Following your move into your live system, Redpath will provide support to your team to ensure that everything is working well and your users are becoming comfortable in their new system.



Need help choosing the right solution for you?

Contact the [Redpath team](#) today for more information about our Fundraising solutions to fit your organization’s size, needs, and budget.

