



CUSTOMER SUCCESS STORY

CUSTOMER

Retirement Housing Foundation

INDUSTRY

Human services

LOCATION

Nation Wide
Corporate Office:
Long Beach, California

Number of Locations

149

Number of Employees

2,500

SYSTEM

Sage Fundraising

Retirement Housing Foundation Serves More Residents with Sage Fundraising 50

“Sage Fundraising 50 is the best thing to happen in the fundraising world since self-adhesive stamps.”

Paula Jameson, director of fund development for the Retirement Housing Foundation (RHF), knows first-hand what a difference Sage Fundraising 50 can make for a non-profit. “When I arrived here in 1999, we had only a small amount of donor records and no database,” she says. “I knew the right software would be worth its weight in gold. So I looked for a system so easy to use that new volunteers could enter data without training—and flexible enough to sustain us through heavy growth.”



Sage Fundraising 50: An Easy Choice

She selected Sage Fundraising 50 for RHF, which provides housing for the older adults, economically disadvantaged families, and persons with disabilities in 24 states, District of Columbia, Puerto Rico and the U.S. Virgin Islands. More than 15,000 people call RHF home, and its 149 communities range in size from a 12-unit facility for the developmentally disabled, to a senior apartment complex in Los Angeles that is

the largest community of its kind in the nation with 1,093 apartments and more than 1,300 residents.

“We use Sage Fundraising 50 for everything—from managing events, our donor database, direct mail generation and lists, to gift processing, thank-you letters and campaign overviews,” explains Jameson. “From the moment I saw the demo, I was impressed. It was much easier to use than any of its competitors, and gave us a much better value too.”

Donation Drives

Sage Fundraising 50 makes it simple to allocate donations among various funds. “Some supporters give to the corporate

CHALLENGE

Lack of customer database prevented the foundation from growing, running efficient fundraising campaigns, or splitting donations among funds.

SOLUTION

Sage Fundraising 50, full-featured fundraising software, with integrated donor, campaign, event-planning, volunteer and member management tools.

RESULTS

Efficiencies in gift processing improved by 50 percent; time to prepare donor letters cut by 40 percent; Sage Fundraising 50 eliminates need for extra personnel.



Your business in mind.

"Sage Fundraising 50 is the best thing to happen in the fundraising world since self-adhesive stamps. To have all the data you need in a computer is a wonderful thing, and makes us better stewards for those we serve."

—Paula Jameson
Director of Fund Development
Retirement Housing Foundation

ABOUT SAGE SOFTWARE

Sage Software has been responding to the needs, challenges, and dreams of small and mid-sized businesses for over 25 years. With a complete range of business management solutions and services, Sage Software helps companies improve customer relationships, reduce costs, and automate and integrate a variety of operational activities. Its solutions support the specialty needs of a broad scope of industry segments, including manufacturing, distribution, construction, real estate, nonprofit, and professional services.



office to help all of our residences nationwide," Jameson says. "Others prefer to support specific communities, programs or endowments. Sage Fundraising 50 is a tremendous asset in this regard, allowing us to split donations and provide accurate records to our donors. We can even identify LYBNYBs—people who donated last year but not the year before—and flag them in our database for special appeals."

RHF uses the software for its Resident Benevolence Fund, which helps pay the rent for older adults with financial difficulties. "We don't want seniors to worry about having to move when money is tight," says Jameson. "With Sage Fundraising 50, we know exactly which type of donor gives to the benevolent program, and can do a focused drive when necessary."

Jameson uses Sage Fundraising 50 to manage the annual toy drive, a huge endeavor. "We have 14 family communities, and give a wrapped gift to every child during the holidays," she notes. "Most donations come from major toy companies. But there are always many children not provided for with those donations so we obtain contributions, with many of our own residents donating to help out. I don't know how we'd do it without Sage Fundraising 50."

Funding Good Works

Other programs that manage donations with Sage Fundraising 50 include the Affordable Housing Fund, which provides seed money for new property acquisitions; the millions of dollars in the Planned Giving Program; Project H.A.N.D.S., which supplies yarn for handmade knitted garments for children in shelters; and the Eden Alternative Program Fund, which brings children, plants and animals into the homes of older adults. "Our residents are much happier and healthier when surrounded by these simple sources of joy," says Jameson.

RHF also relies on the software to help run its Children's Education Fund. "Each child living in our communities can receive grant money at the beginning of the semester to cover binders, shoes, coats, lunches and other educational expenses," Jameson explains. "We manage the program, including direct mail campaigns, with Sage Fundraising 50."

Extra Efficiencies

Has the software streamlined operations for RHF? "Sage Fundraising 50 has made us 50 percent more productive in processing gifts," says Jameson. "Without it, I'd need more staff. We can do a query on all donor records and print targeted address labels in five minutes. It now takes us 40 percent less time to do letters, and reports are a snap. Plus, we've grown by over 50 percent since getting the software, and Sage Fundraising 50 has easily accommodated the growth."

Having worked in the non-profit industry for 25 years, Jameson is grateful for the improvements delivered by Sage Fundraising 50. "I remember when we tracked donors on paper lists, 3 x 5 cards, and licked stamps by the thousands. So my comment about Sage Fundraising 50 being as great as the self-adhesive stamp really says something. To have all the data you need in a computer is a wonderful thing, and makes us better stewards for our contributions and for the people we serve."



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