



CUSTOMER SUCCESS STORY

**CUSTOMER**

St. Joseph High School

**INDUSTRY**

Nonprofit  
Secondary Education

**LOCATION**

Kenosha, Wisconsin

**Number of Locations**

One

**Number of Employees**

75

**SYSTEM**

Sage Fundraising 50

## St. Joseph High School Continues Tradition of Excellence With Sage Fundraising 50

St. Joseph High School in Kenosha, Wisconsin, is blessed with an enthusiastic support base. Its numerous development programs bring in about 16 percent of the school's operating expenses each year, helping maintain affordable tuition rates. So keeping good records on constituents is of paramount importance.

Until recently, however, the development department's information, consisting of nearly 8,000 records, was stored on numerous spreadsheets, none of which could share data with the others. Updates to one file were often not made in others. Many duplicate records existed.

### An Inadequate System

"We knew the existing system was completely inadequate," says Pauline McTernan, development director. "So we formed a technology committee to research fundraising software that would be appropriate for a school of our size. Our primary criteria were ease-of-use, adaptability, and value. We selected Sage Fundraising 50 and were happy to discover functionality we didn't even know we needed!"



St. Joseph now uses Sage Fundraising 50 to manage all aspects of development, including both core fundraising initiatives and outreach programs. It tracks more than 13,000 records on various activities. These include an auction in November, followed by an annual fund appeal, a Christmas Breakfast with Santa, the Spring Musical patron drive and dinner show, a golf outing and dinner/dance for the Athletic Association, two alumni newsletters per year, and the For Pete's Sake Scholarship Walk/Run in the summer in memory of a deceased alumnus.

"Every donation goes into Sage Fundraising 50, which means that all records are stored in a single place," says Donna Makouske,

**CHALLENGE**

10+ stand-alone spreadsheets did not allow for data sharing; donor and alumni records were out of date; communicating with constituents was "unbelievably difficult"

**SOLUTION**

Sage Fundraising 50 to automate all fundraising operations, including recordkeeping for mailings, events, volunteers, and donations

**RESULTS**

Revenues from advertising book increased by more than 140%, from \$30K to \$72K, due to better records and donor confidence; solicitation revenue increased by more than 25%; can produce annual report for first time ever



*"Our constituents really appreciate us demonstrating good stewardship of our funds. Sage Fundraising 50 is a big help in this regard, and encourages higher levels of giving."*

—Pauline McTernan  
Development Director  
St. Joseph High school

## 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.



development secretary. "Our data is now accurate and easily accessible for a wide variety of uses. Also, an update made in one area is automatically changed everywhere else, which helps a lot when we're generating mailing lists. The system also helps ensure that each and every donor receives a prompt thank you."

### First Annual Report

The software has also opened up new possibilities, like an annual report, that St. Joseph had not considered. "Our school is 48 years old, and had never produced an annual report because it was impossible to generate reliable data," explains McTernan. "Now we have published a report for the first time, thanks to Sage Fundraising 50. Not only do we have accurate financial information to share, but we can also list donors. This increases donor confidence. I'd estimate that the software has increased solicitation revenue by at least 25 percent."

Big improvements can be seen in advertising revenue for the show book accompanying the school's annual Spring Musical. "Several years ago, our ad book generated \$30,000," says McTernan. "This year the figure was \$72,000, because all necessary information was stored from previous years. It was very easy for us to contact previous sponsors and build on our prior successes."

### Soliciting Past Stars

St. Joseph High School has discovered that Sage Fundraising 50 is flexible enough to customize to its unique needs, especially through the use of attribute fields. "We used student volunteers to go through old yearbooks and enter data on alumni into the system. For example, in the attribute fields for each graduate, we list which sports they played, as well as which theater productions they were involved in. Then we can go back to those alumni and solicit

them for activities they would most likely be interested in supporting."

An example comes from last year's Spring Musical. "We were doing '42nd Street', which had previously been done at St. Joseph in 1988," says Makouske. "So we used Sage Fundraising 50 to pull names of alumni from the previous cast, and send them an invitation to a reunion. We also asked them to place \$25 ads wishing the new cast good luck. It worked out very well and people were happy to contribute. This year, we expanded the reunion to include all theater alumni, and we hope to increase participation each year."

### Matching Donations

Development staff turned to Sage Fundraising 50 to expand matching donations from contributors' employers. "The software helps us identify which donors are employed by matching companies, to boost their giving power," Makouske notes. "We can then prompt them to participate in their employer's matching programs. It's a way that our supporters can allocate more to us without the money coming out of their own pockets."

People who contribute to St. Joseph have had only positive things to say about the new software. "Our constituents really appreciate us demonstrating good stewardship of our funds," says McTernan. "Sage Fundraising 50 is a big help in this regard, and encourages higher levels of giving."

"I really can't imagine doing my job without Sage Fundraising 50," says Makouske. "So far, it has allowed us to meet every request for information."



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