

2016 PCUSA Mid Council Financial Network Mtg.

Presented by Lilly Straith, CTP, Senior Enterprise Account Executive

Date: November 16, 2016

blackbaud[™]
> power your passion

Agenda

- Introductions
- Overview of Blackbaud
- Non-Profit Data Insights
- Faith Based Data Insights
- Trends
- Solutions
- Taking Action/How to Reach Your Potential
- Q&A



приємно
познайомитись

Hi!

I'm Lilly Straith

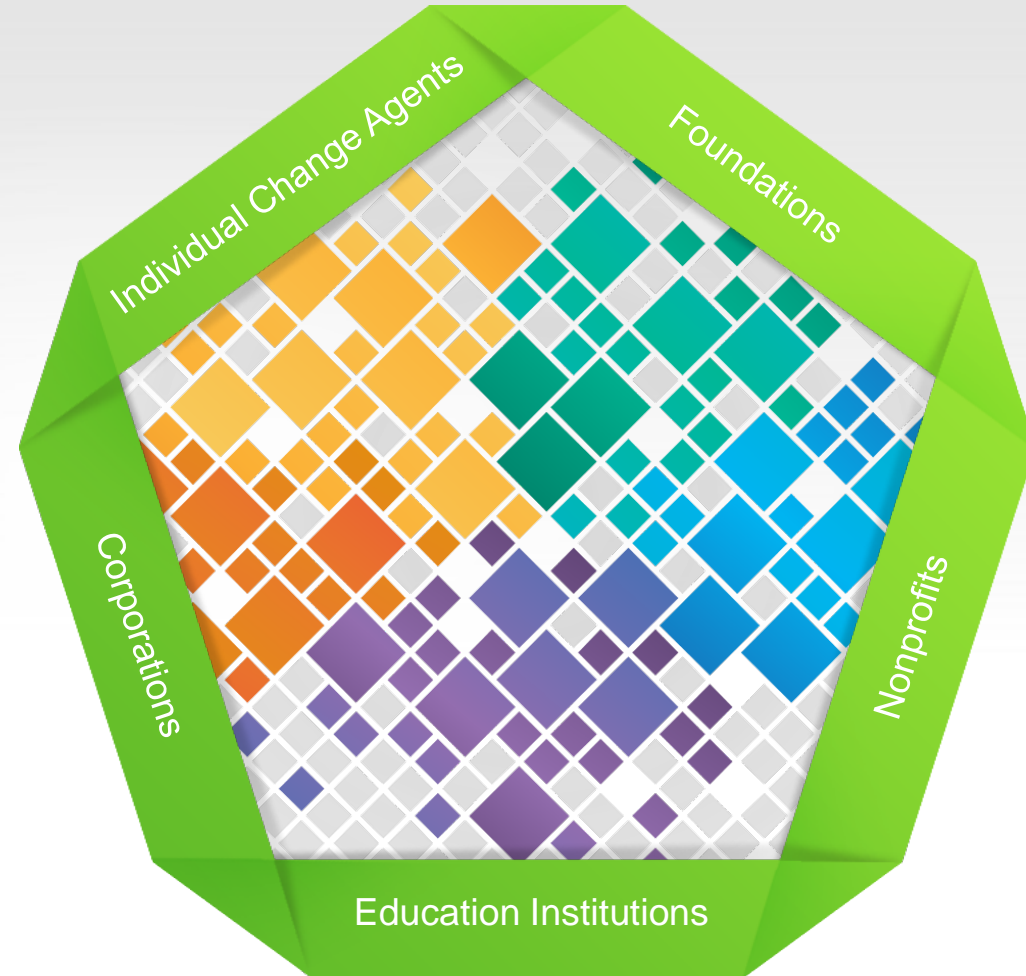
Senior Enterprise Account Executive

At Blackbaud since May 2016

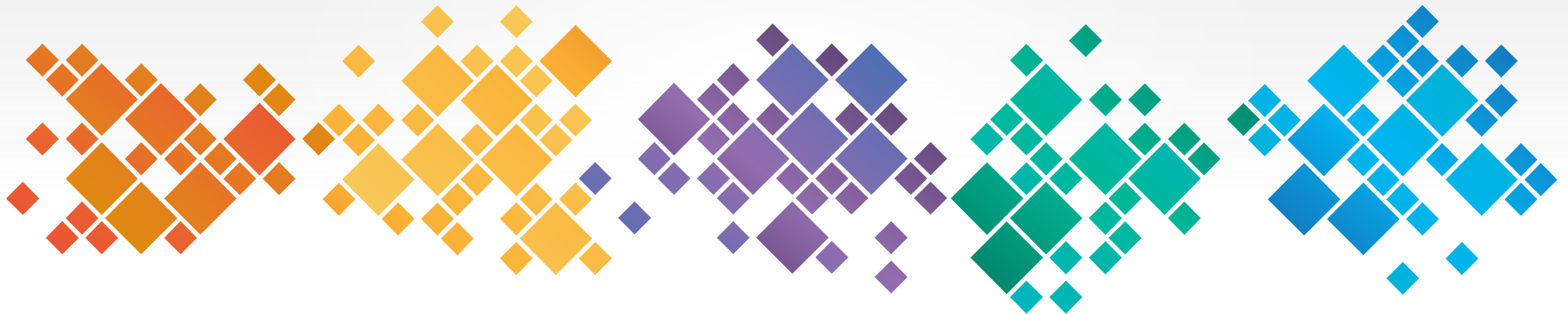
Hometown: Cornelius, NC

- ▶ Former Board Member for the Ukrainian Museum/Archives
- ▶ Helped with the Katrina victims in MI
- ▶ Collected food and monetary donations for the Food Kitchens in Detroit
- ▶ Speak Ukrainian
- ▶ Enjoy the arts and theater
- ▶ Passionate about Golden Retrievers
- ▶ Have wonderful friends and family
- ▶ Support human services & animal rescue

The world's leading
cloud software
company powering
social good



We **support** the entire social good community



Corporations

Individual
Change Agents

Education
Institutions

Foundations

Nonprofits



FAITH BASED ORGANIZATIONS

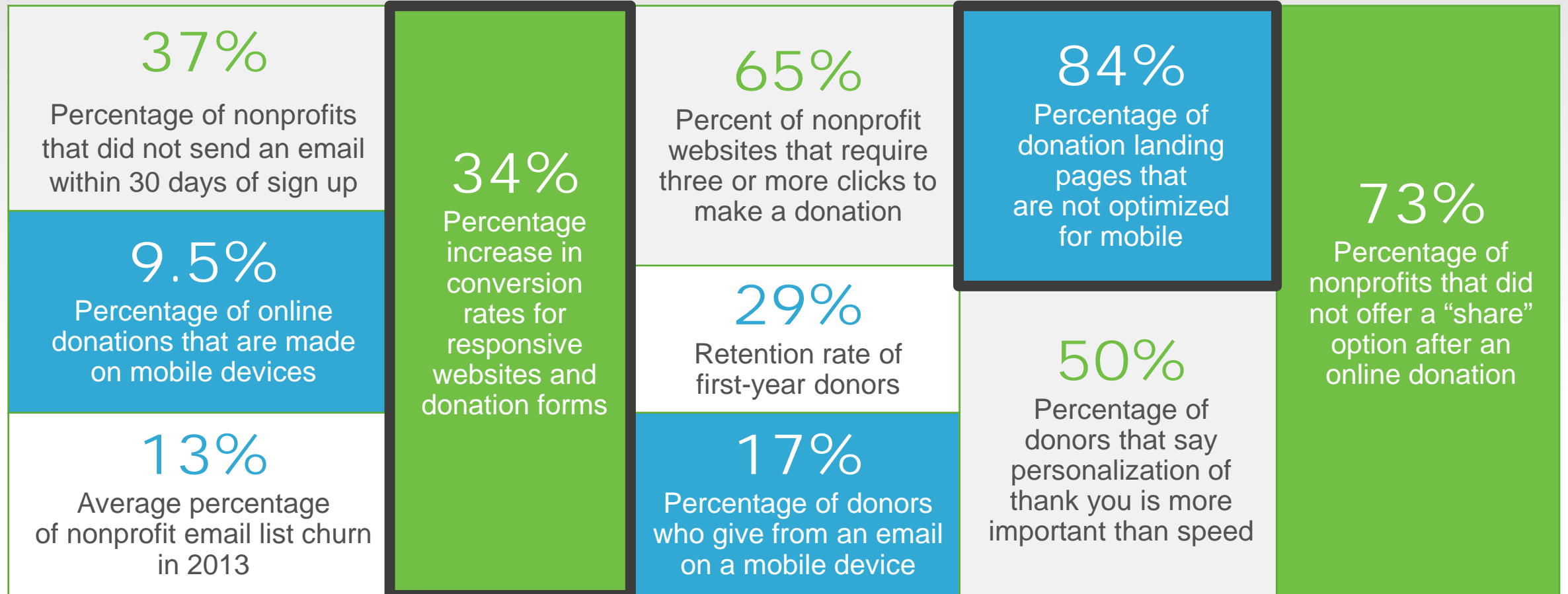
We help over 1,700 religious and faith based organizations:

- *Capitalize on new opportunities in fundraising and member management*
- *Track the impact of their mission and analyze organizational efficiency*
- *Manage complex reporting requirements with ease, freeing staff time for more strategic initiatives*

Touch more lives through enhanced financial stewardship and constituent management



First, Some Data – Nonprofits Have Real Challenges



Source: Dunham+Company; Blackbaud internal; DonorVoice; M+R Research Services

2015 Giving Trends

2015 Overall Giving Trends By Size	
Size	YOY% Change
Small (Less than \$1M)	5.5%
Medium (\$1M to \$10M)	-0.7%
Large (\$10M+)	1.4%

2015 Online Giving Trends By Size	
Size	YOY% Change
Small (Less than \$1M)	8.3%
Medium (\$1M to \$10M)	9.1%
Large (\$10M+)	9.6%

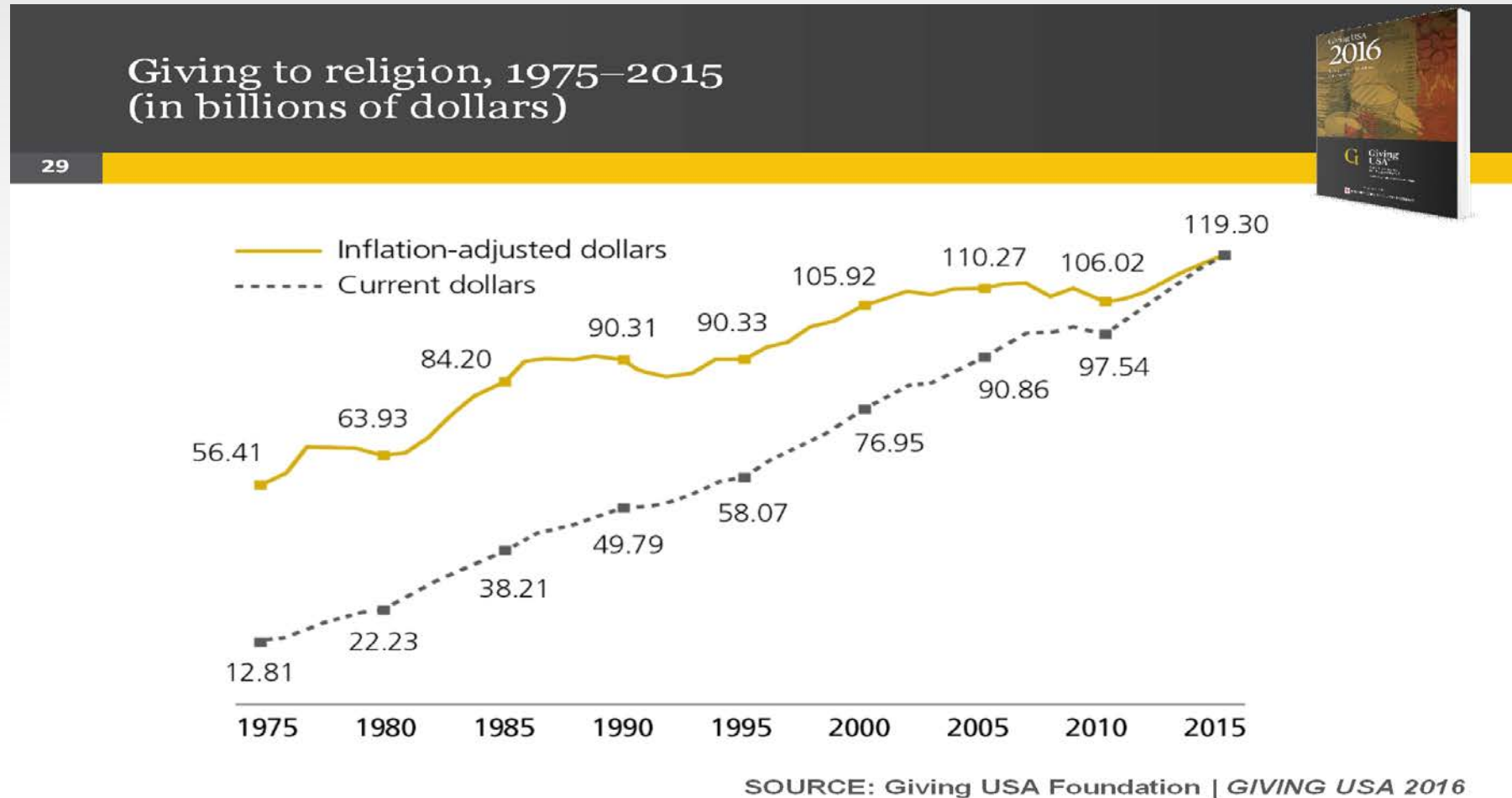
2015 Charitable Giving Report

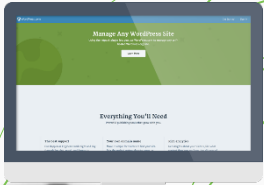
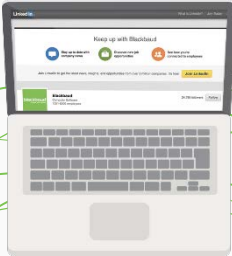
- ▶ Charitable Giving has recovered from the recession but year-over-year growth rates are showing signs of slowing
- ▶ 2015 Overall Giving Trends
 - Overall giving in 2015 grew 1.6% on a year-over-year basis for the 5,379 Non-Profit organizations in the analysis
 - This is the fourth consecutive where the Charitable Giving Report has found an increase in giving
 - Online giving in 2015 grew 9.2% year-over-year for the 3,983 Non-Profit organizations in the analysis
 - The Faith Based sector has strong numbers due to the following:
 - Repeat Giving
 - Sustainers
 - Advocacy

2015 Overall Giving Trends By Sector

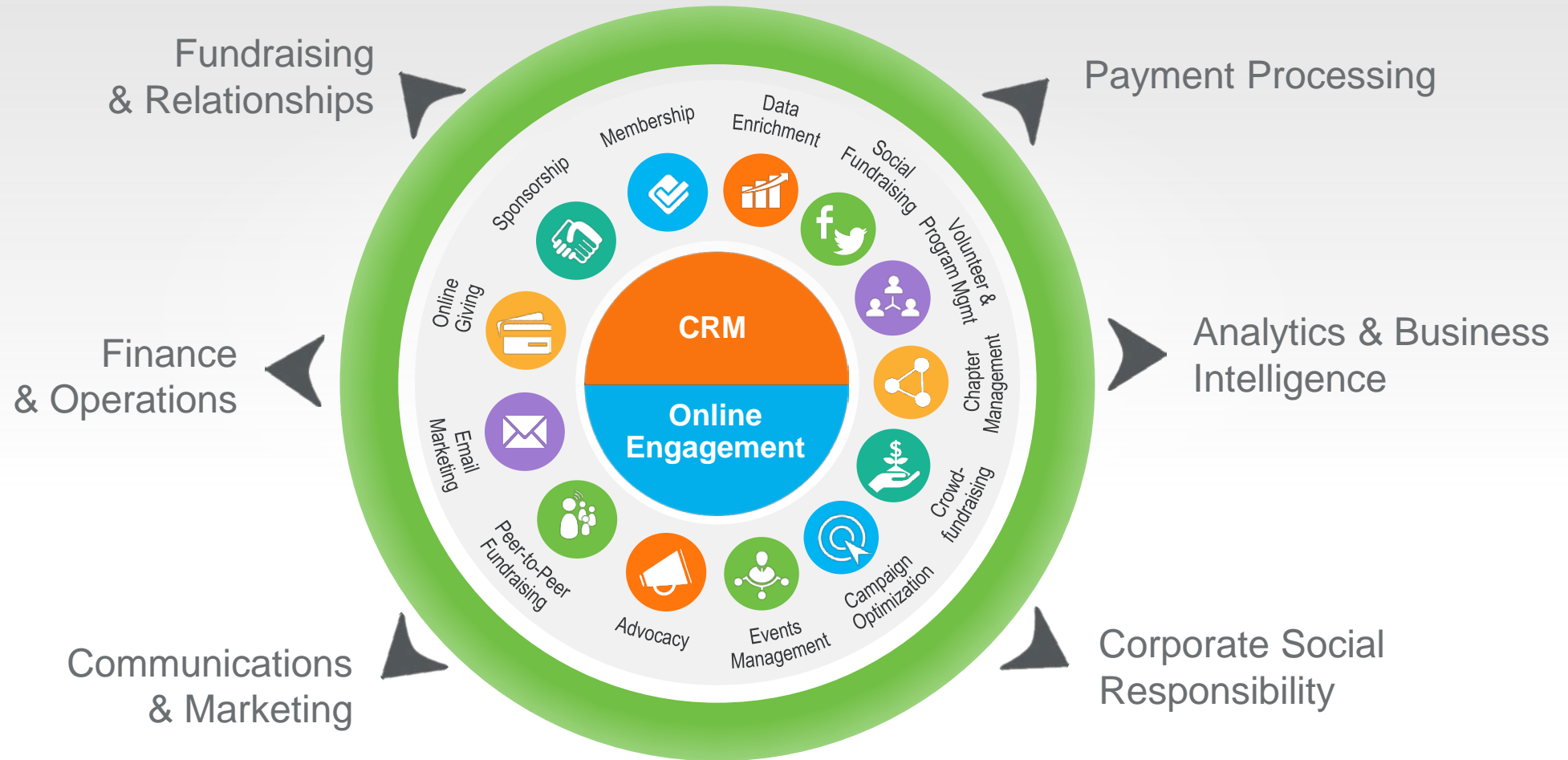
- ▶ Arts and Cultural 0.5%
- ▶ Environmental/Animal 0.5%
- ▶ Faith Based 3.9%
- ▶ Healthcare 1.9%
- ▶ Higher Education (0.4%)
- ▶ Human Services (2.8%)
- ▶ International Affairs 5.1%
- ▶ K-12 (1.0%)
- ▶ Medical Research 0.0%
- ▶ Public and Society (0.9%)

Giving to Religion





THE ONLY COMPLETE SOLUTION OFFERING



Areas of Focus

- ▶ Marketing and Social
- ▶ Fundraising and CRM Technology
- ▶ Financial Reporting
- ▶ Analytics
- ▶ Payments

The marketing landscape is changing



Your constituents expect you to communicate with them on their terms

The marketing landscape is changing



Fragmented data and outdated technology makes it hard to present a consistent view to constituents

Plan and coordinate Omni Channel marketing efforts- OminiPoint



Campaign Execution



Automate & leverage

Marketing automation and segmentation, leveraging the Interactions

Create & Execute

Create trigger-based campaigns, and execute your marketing strategy across channels

Identify & target

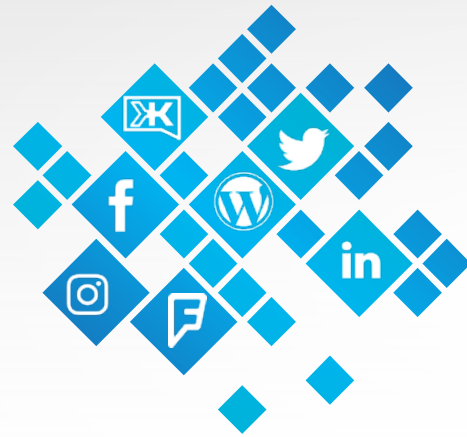
Increase response rate and maximize your marketing budget by targeting optimal segment

How it Attentive.ly works:



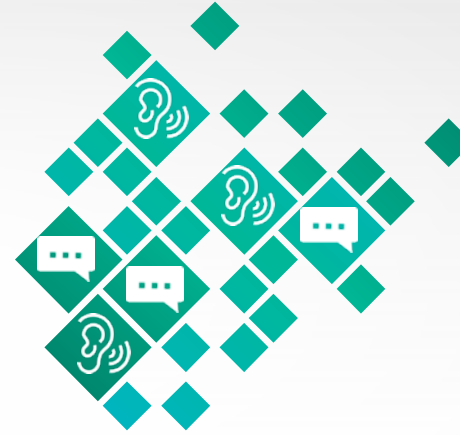
Email List

Start with
your CRM



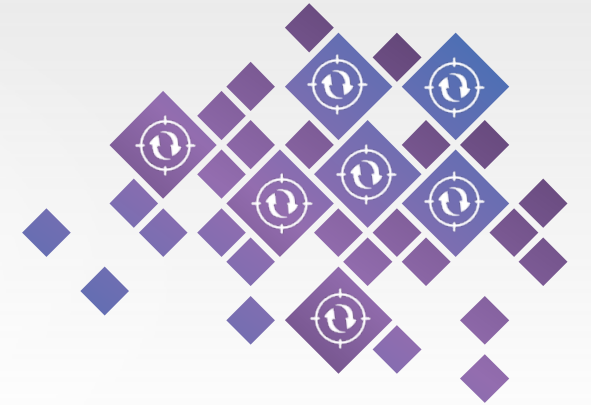
Social Match

Match to 100+
social networks



Enterprise
Listening

See what they're
saying on social



Multi-channel
Targeting

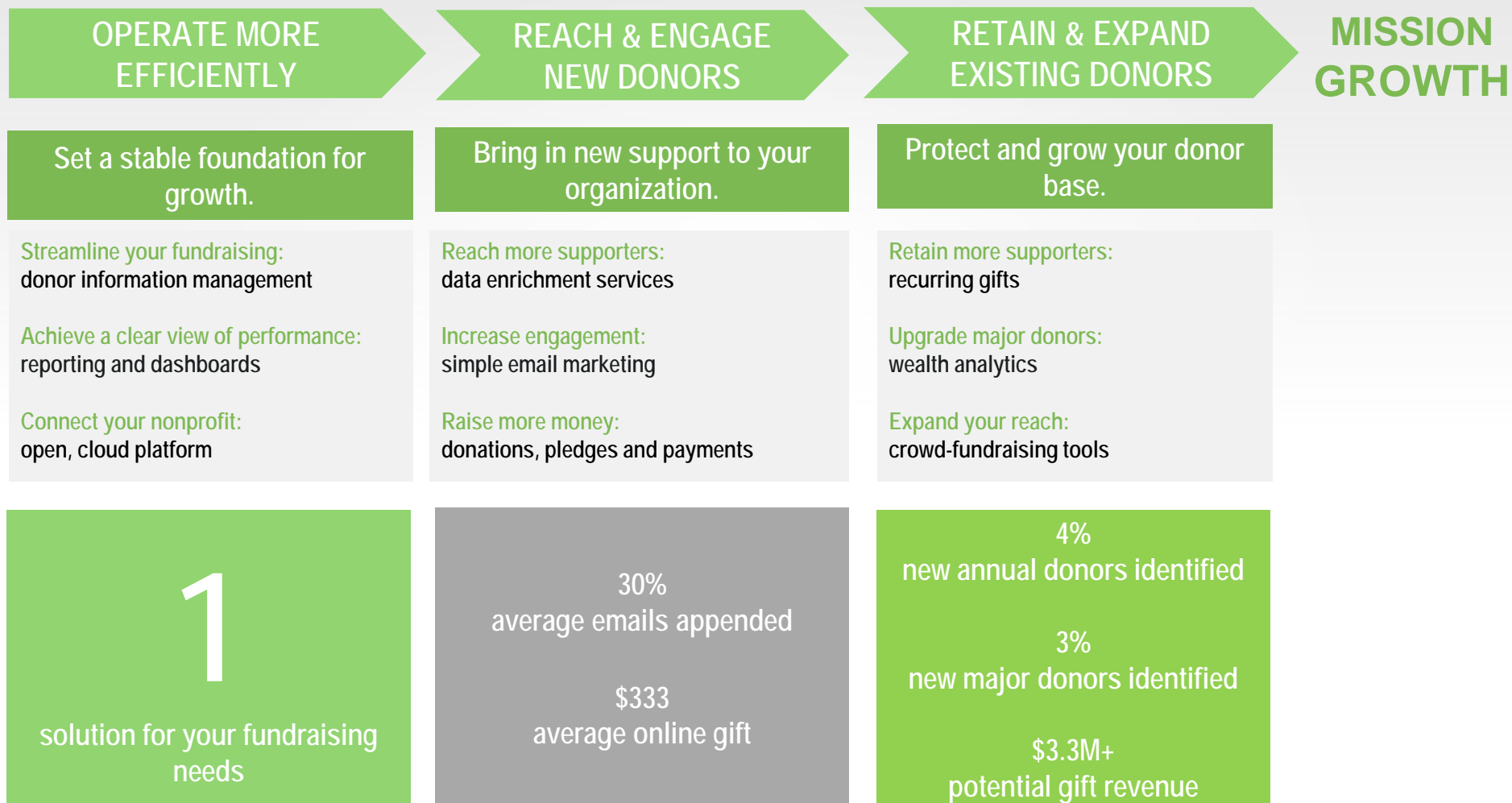
Automate email
& social marketing

LUMINATE | ONLINE CRM ENGAGEMENT



Raiser's Edge NXT™

leads to real results...



Financial Edge NXT

The power to do more

The ability to do more is now at your fingertips with a mission-changing cloud-driven accounting solution that's intuitive, integrated, and built just for nonprofits.

Financial Edge NXT™

More Complete Fund Accounting



➤ **Manage your entire business office:**

- General Ledger, Project-Grant-and-Endowment Management, Budget Management, Accounts Payable, Accounts Receivable, Purchasing and Requisition, Cash Management, Fixed Assets, Allocation Management, and more

➤ **In a solution designed exclusively for Non-Profit accounting needs:**

- Flexible chart-of-accounts
- Configurable business rules
- Multi-scenario budgeting
- Direct/indirect allocations
- Record encumbered funds
- Robust grant, program, and donation tracking

ROI Infographic-Target Analytics

- Review year-over-year results from past modeling clients
- Stats include – Annual Fund, Major Donor, and Principal Giving levels



Blackbaud Merchant Services™

An end-to-end payment processing solution that gives your nonprofit more time and money to make a difference

% OneRATE™

Takes the guesswork out of budgeting by charging one rate and no hidden fees

Automatic Credit Card Updates

Minimizes revenue disruptions and saves resource time by automatically updating credit card data



Detailed Reporting

Includes card holder name, last four digits of the credit card, and gross amount, fees, and net deposit for every transaction

Date	Account type	Account holder	Account Number	Gross amount	Fees	Net amount
01/08/16	Visa	John Williams	*****1234	\$ 45.00	\$ (1.43)	\$ 43.57
01/08/16	Visa	Bob Smith	*****5678	\$ 30.00	\$ (1.04)	\$ 28.96
01/08/16	Visa	Chris Johnson	*****9010	\$ 45.00	\$ (1.43)	\$ 43.57
01/08/16	Discover	Jane Doe	*****1111	\$ 50.00	\$ (1.54)	\$ 48.46
01/08/16	Visa	Frank Edwards	*****2222	\$ 40.00	\$ (1.34)	\$ 38.66
01/08/16	Visa	Paul Green	*****3333	\$ 20.00	\$ (0.67)	\$ 19.33
01/08/16	Visa	Greg Carter	*****4444	\$ 100.00	\$ (3.44)	\$ 96.56
01/08/16	MasterCard	Mike Brown	*****5555	\$ 50.00	\$ (1.66)	\$ 48.34
01/08/16	American Express	John Smith	*****6666	\$ 50.00	\$ (1.54)	\$ 48.46
01/08/16	Visa	John Williams	*****1234	\$ 50.00	\$ (1.66)	\$ 48.34
01/08/16	Visa	Kathy Washington	*****7777	\$ 50.00	\$ (1.66)	\$ 48.34
01/08/16	MasterCard	Larry L. Johnson	*****8888	\$ 50.00	\$ (1.66)	\$ 48.34
01/08/16	MasterCard	Mike Maxwell	*****9999	\$ 50.00	\$ (1.66)	\$ 48.34
01/08/16	MasterCard	John Wilson	*****0000	\$ 50.00	\$ (1.66)	\$ 48.34
01/08/16	Visa	Debra Collins	*****1111	\$ 50.00	\$ (1.66)	\$ 48.34
01/08/16	Visa	Patrick Phillips	*****2222	\$ 50.00	\$ (1.66)	\$ 48.34
01/08/16	Visa	Wanda Garcia	*****3333	\$ 40.00	\$ (1.34)	\$ 38.66
01/08/16	MasterCard	Walter Riker	*****4444	\$ 20.00	\$ (0.67)	\$ 19.33
01/08/16	American Express	Samuel Smith	*****5555	\$ 50.00	\$ (1.54)	\$ 48.46
01/08/16	Discover	Tom Taylor	*****6666	\$ 20.00	\$ (0.67)	\$ 19.33
01/08/16	American Express	Olivia Uno	*****7777	\$ 50.00	\$ (1.54)	\$ 48.46
01/08/16	American Express	Victor Uno	*****8888	\$ 50.00	\$ (1.54)	\$ 48.46
				\$ 1,701.00	\$ (0.21)	\$ 1,701.21

Safe and Secure

Simplifies PCI compliance and provides standard and premium fraud protection as well as account monitoring

Integrated with Blackbaud Solutions

Updates constituent records with detailed credit card transaction information



How to Reach Your Potential

- Identify fundraising practices generating better results
- Be open to change
- Consider partnering with peers and/or outsourcing
- Recognize timeline & required resources
- Be willing to reallocate resources
- Take the long view



Your best long-term Partner

Vertically-optimized solutions

Dedicated R&D

600+ software engineers

Clear roadmaps

Consistent user experience across products

High-performance cloud

Open REST APIs



Award-winning support with 250+ experts

Prof. services and training

Dedicated customer success team

Online communities with 40,000+ peers

Leading Partner Network

Industry experts on staff

Research, thought leadership, events

35,000+ satisfied customers

45/50 most influential nonprofits use Blackbaud

Forbes' top most innovative growth companies

Forbes 2016 World's Most Innovative Growth Companies April 2016

45 of "The 50 Most Influential Nonprofits" (ranked by The Street.com featured by MSN; May 2016) use Blackbaud solutions



Keep in touch!



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For more information, resources, and conversations, visit:

www.blackbaud.com

Thank you

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› power your passion