

Sage Intacct Webinar

Elevating Your Nonprofit Story with Data & Performance Metrics

Michael Blanton

Sr. Director, Nonprofit Industry Marketing, North America

Pooja Pewekar

Sr. Product Marketing Manager, North America

Sage



Housekeeping

- Type a question into the Q&A box to submit it to our team
 - We'll try to get to all the questions during the webinar
 - If we don't get to your question, we'll follow up afterwards
- A copy of the presentation and webinar recording will be emailed to you after the webinar.
- Please take a few minutes to fill out the survey at the end of the webinar.



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Introductions



Michael Blanton

Sr. Director of Nonprofit Industry
Marketing, North America



Pooja Pewekar

Sr. Product Marketing Manager,
North America

Land Acknowledgement

Sage

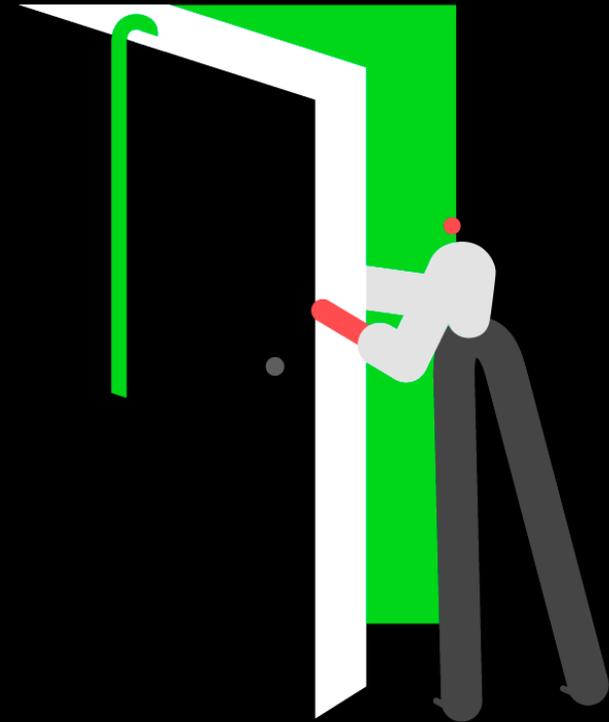


Sage acknowledges that it is situated on the unceded traditional territories of the Musqueam, Squamish, and Tsleil-Waututh Nations.

Sage

What we'll cover today

- **Giving trends and how you can leverage them for impact**
- **Best practices for sharing your story**
- **Strengthen your story with data and performance metrics**
- **Technology that makes it work**
- **Summary and resources**



Why Storytelling

Intro





Reuters

Business Remains Most Trusted Institution

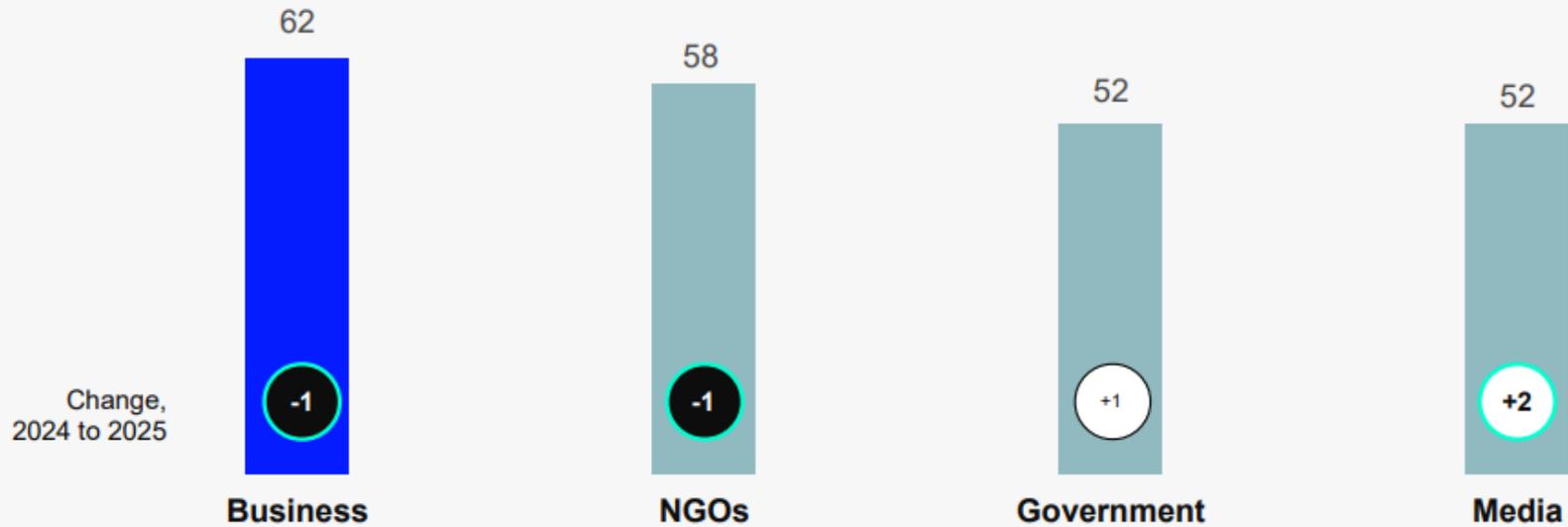
Percent trust

GLOBAL 28

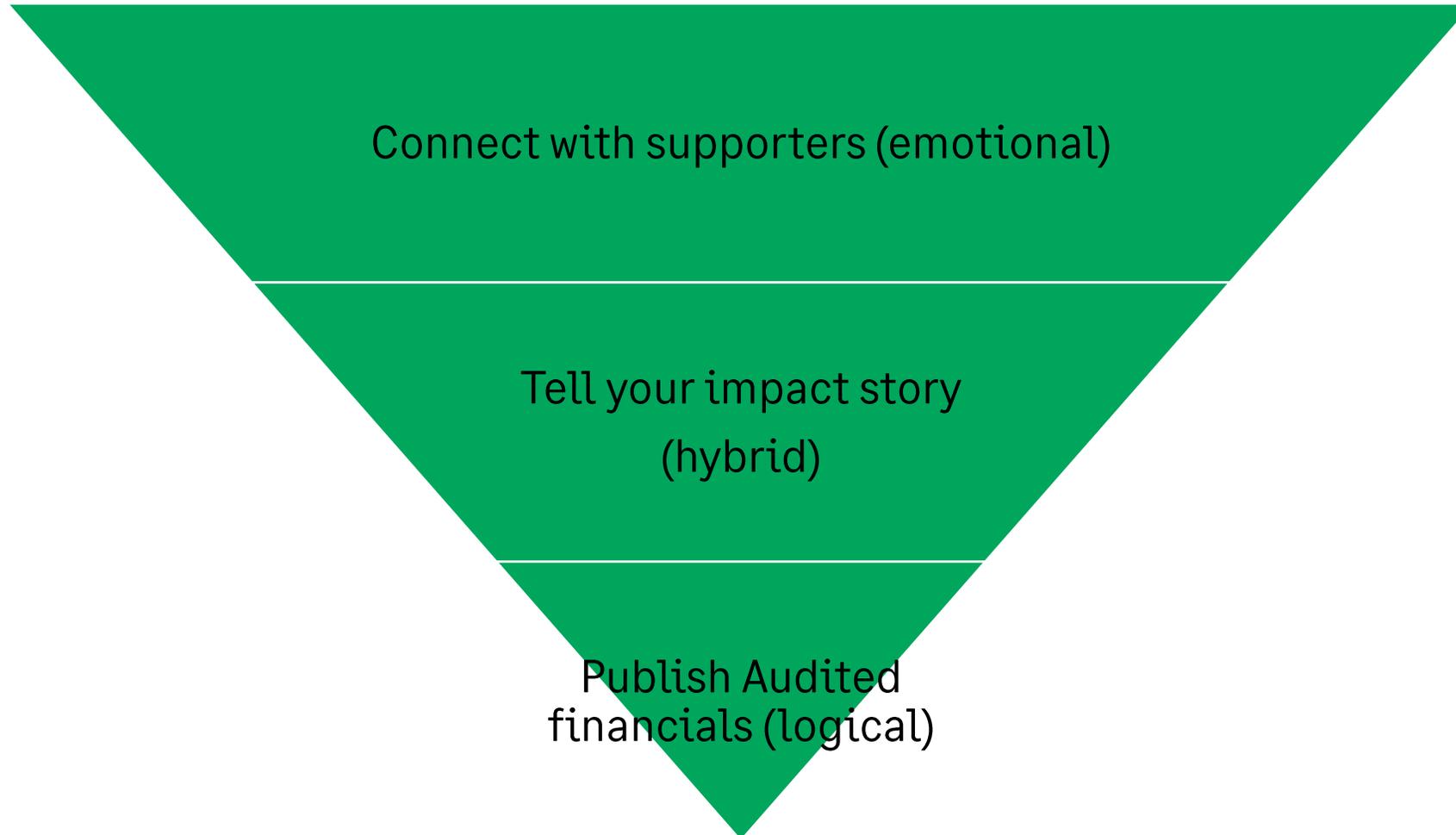
Distrust (1-49) Neutral (50-59) Trust (60-100)



Significant change



NFP narratives



Key narrative components

WHAT



Relevant (audience)



Connects (emotion)

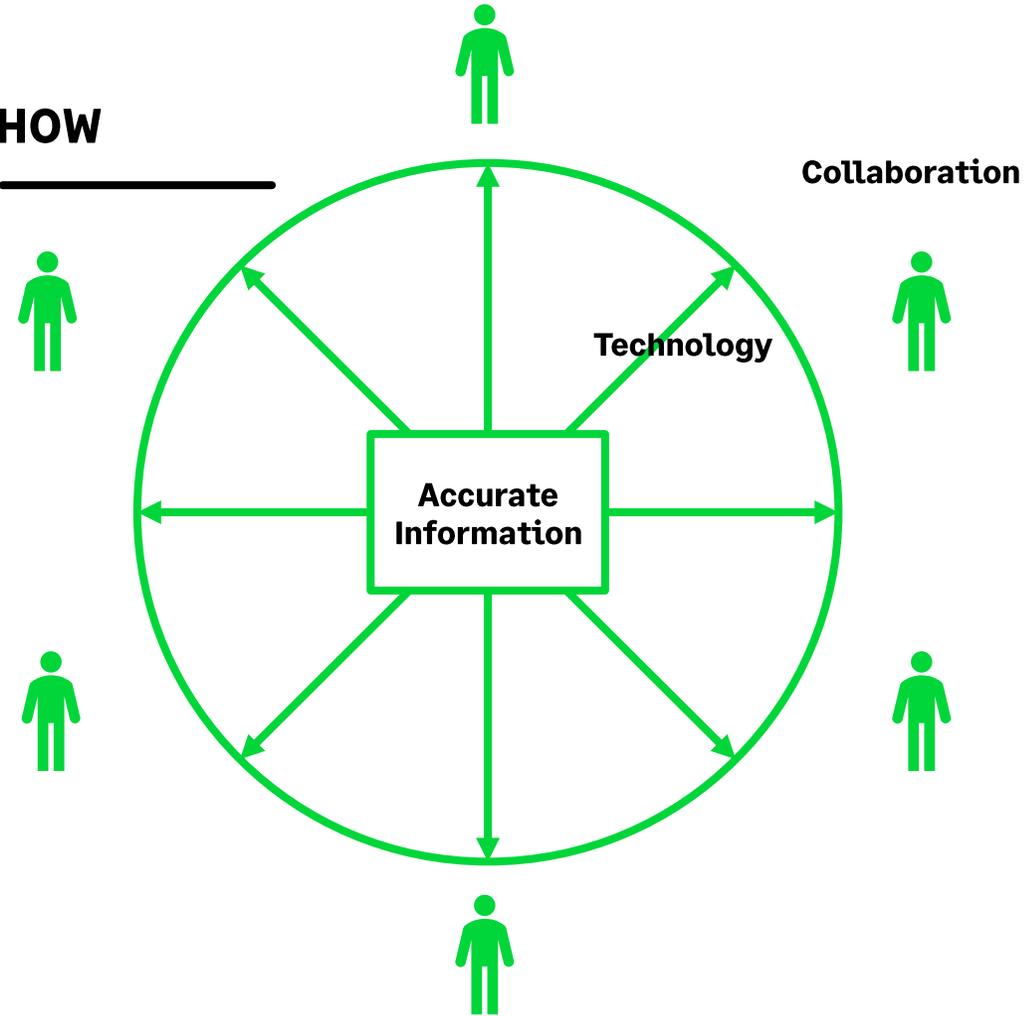


Timely / Current



Compels to action

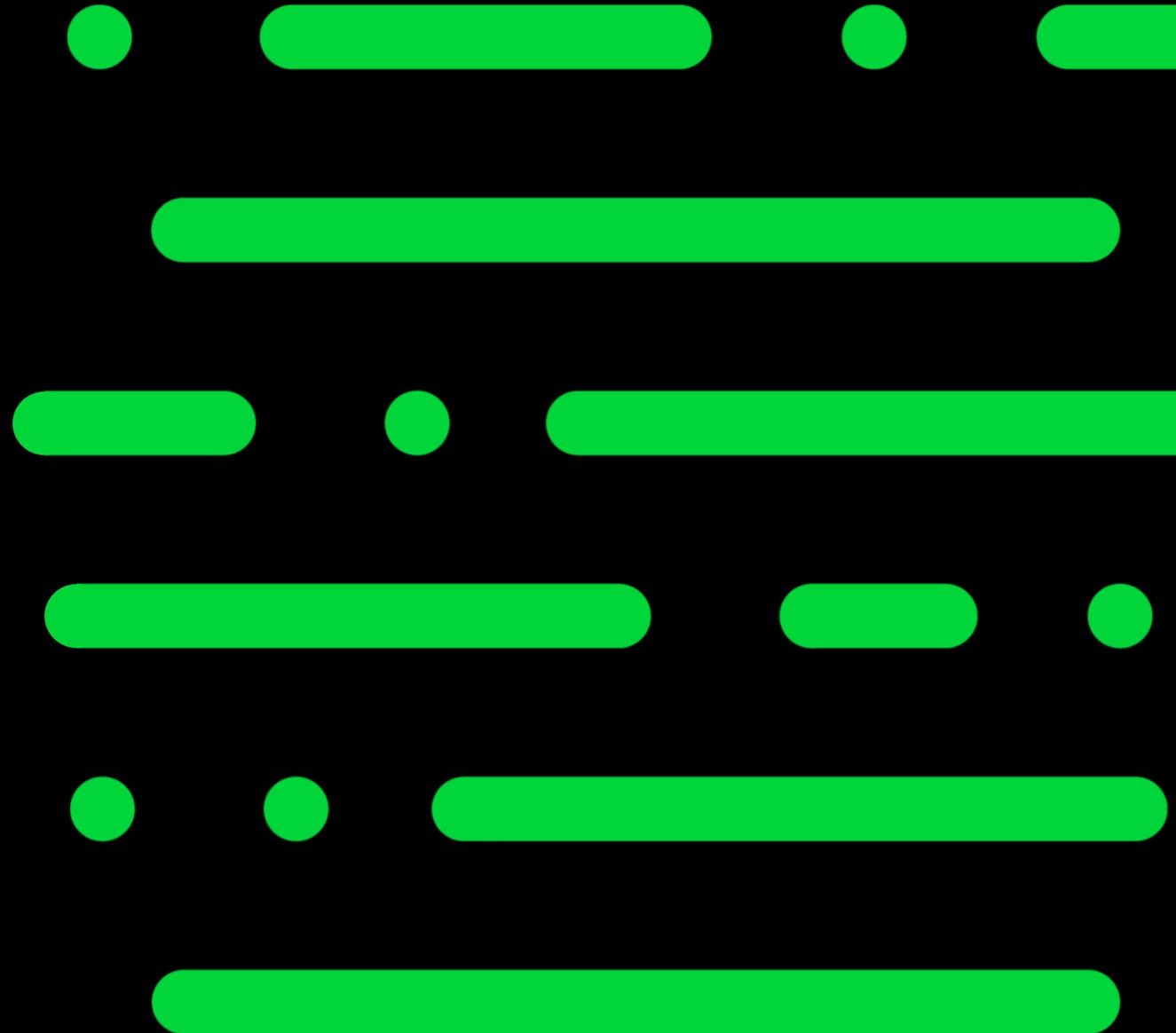
HOW



Polling Question #1

How confident are you in your organization's ability to tell its story using data and performance metrics?

- Very confident
- Somewhat confident
- Neutral
- Not very confident
- Not confident at all



Latest Giving Trends

How to leverage them for the most impact



Total giving, 2015-2021

More Dollars* were donated by fewer people

FIGURE 3
Total Value of Donations

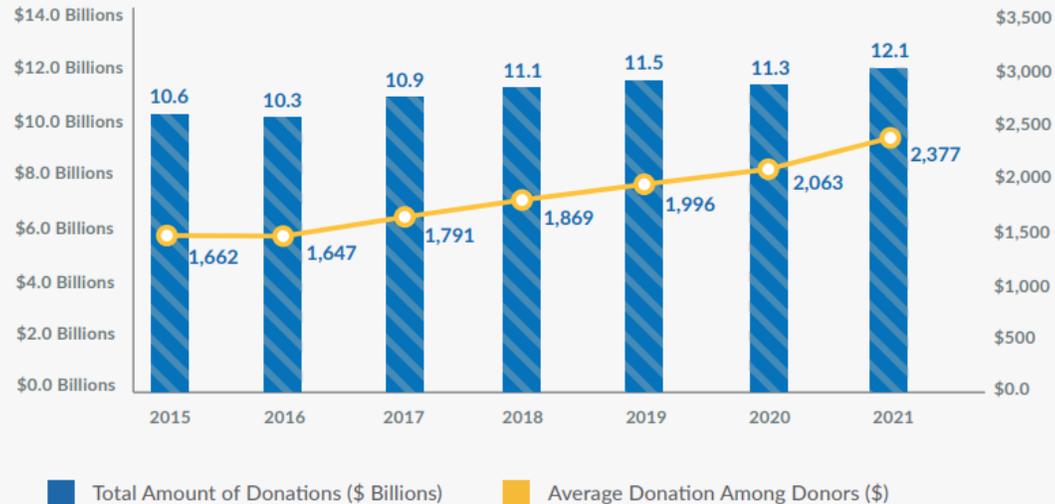


FIGURE 1
Percentage of Canadians Claiming Donations on Their Tax Returns

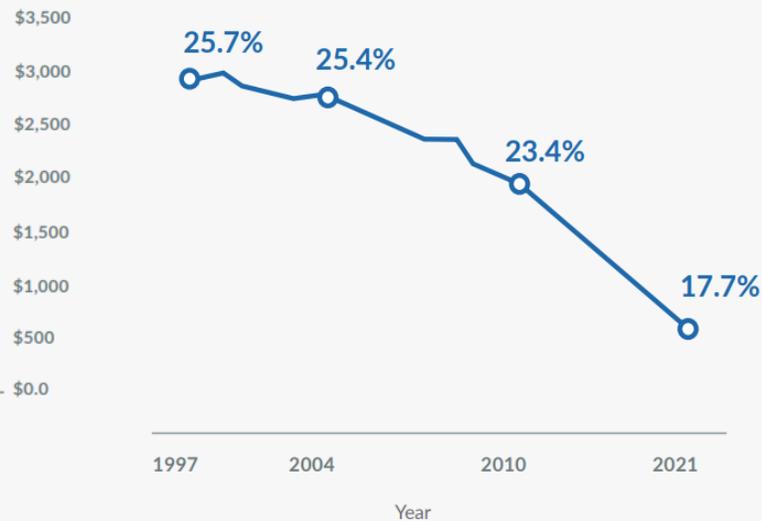
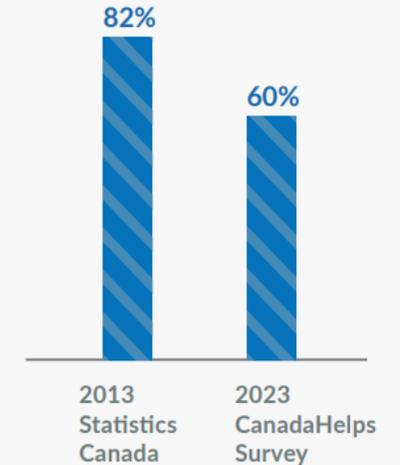


FIGURE 2
Percentage of Canadians Who Made any Monetary Donations to Charity, Survey Data



*in \$ Billions

Source: CanadaHelps, <https://indd.adobe.com/view/763060b8-d8a0-48c9-8325-c9e619340e9a>

Giving by recipient sector

Donation Rate by Cause Area (Among Donors)

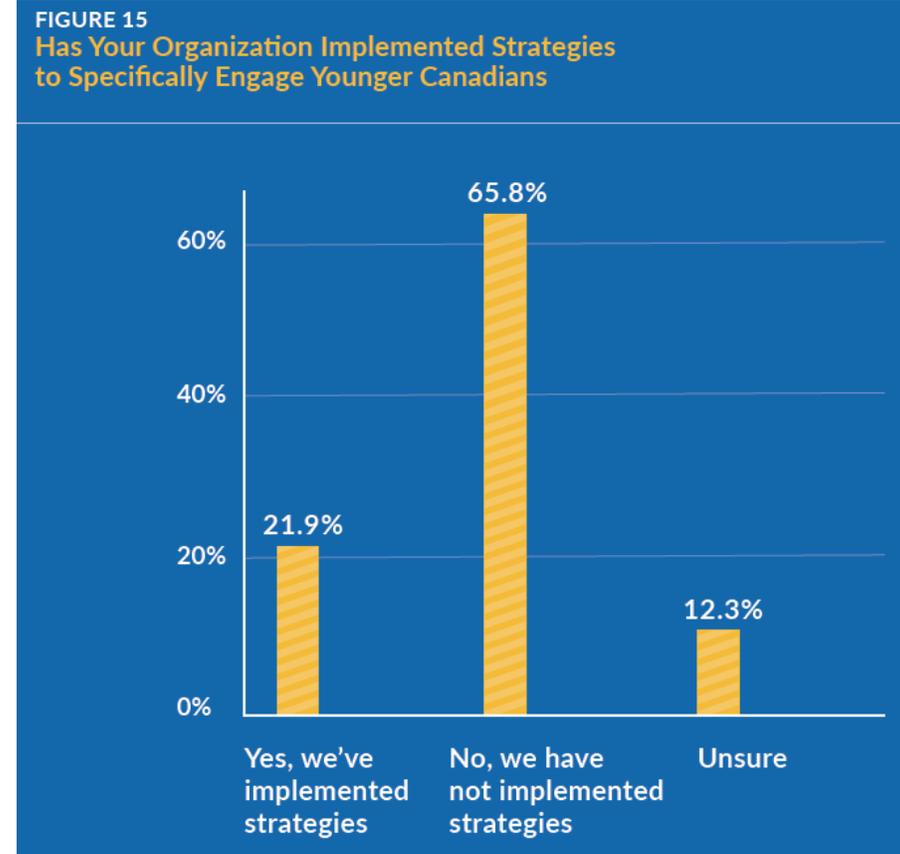
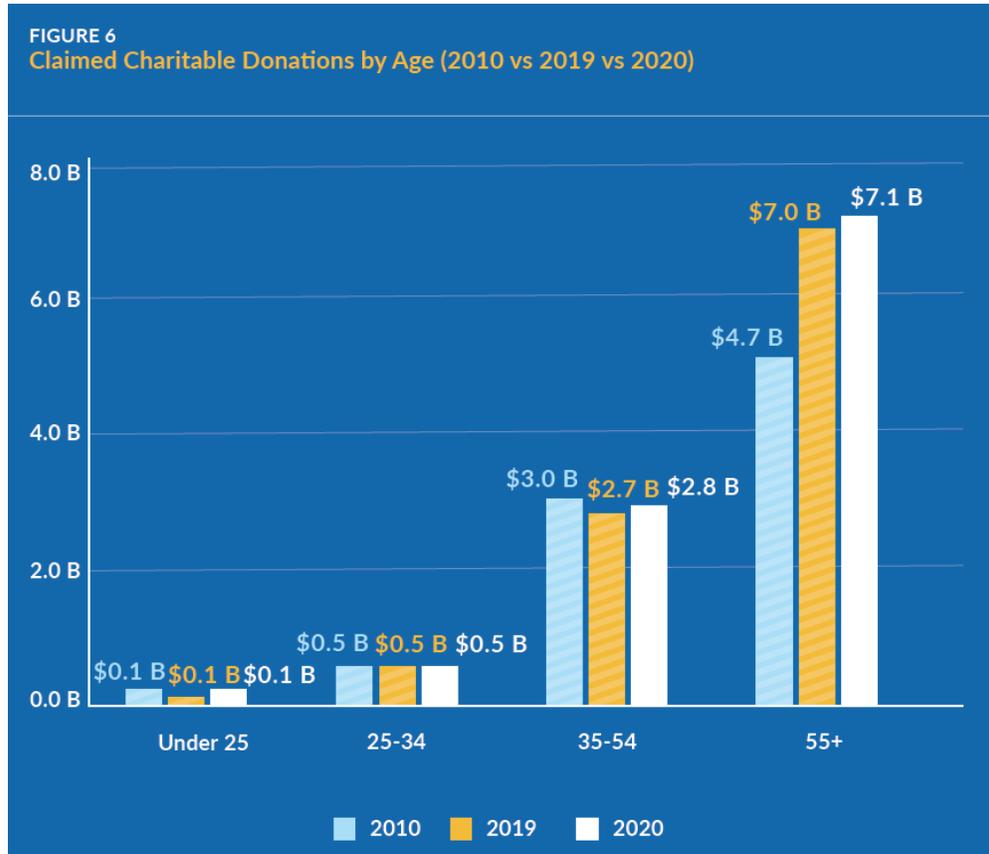
| Cause area | Total |
|---|-------|
| Weighted Total | 720 |
| Animal charities (wildlife conservation, animal welfare, zoos) | 27% |
| Arts & Culture (museums, festivals, community art, theatre, childrens' programming) | 9% |
| Education | 14% |
| Environment | 13% |
| Health (e.g. mental health, hospitals, specific diseases, etc) | 55% |
| Indigenous Peoples | 4% |
| International (e.g. international social services, health, or disaster relief) | 17% |
| Religious | 21% |
| Social services (e.g. children and youth, domestic disaster relief, poverty, food banks) | 40% |
| Public benefit (e.g. community foundations, funding organizations like United Ways or Rotary Clubs, umbrella organizations, public spaces not otherwise captured) | 25% |
| Other (specify) | 3% |

'Q: "Thinking of the charitable causes that you gave a financial contribution to..."

Source: CanadaHelps 2023 donor and climate survey

Source: CanadaHelps, <https://indd.adobe.com/view/763060b8-d8a0-48c9-8325-c9e619340e9a>)

Aging donors

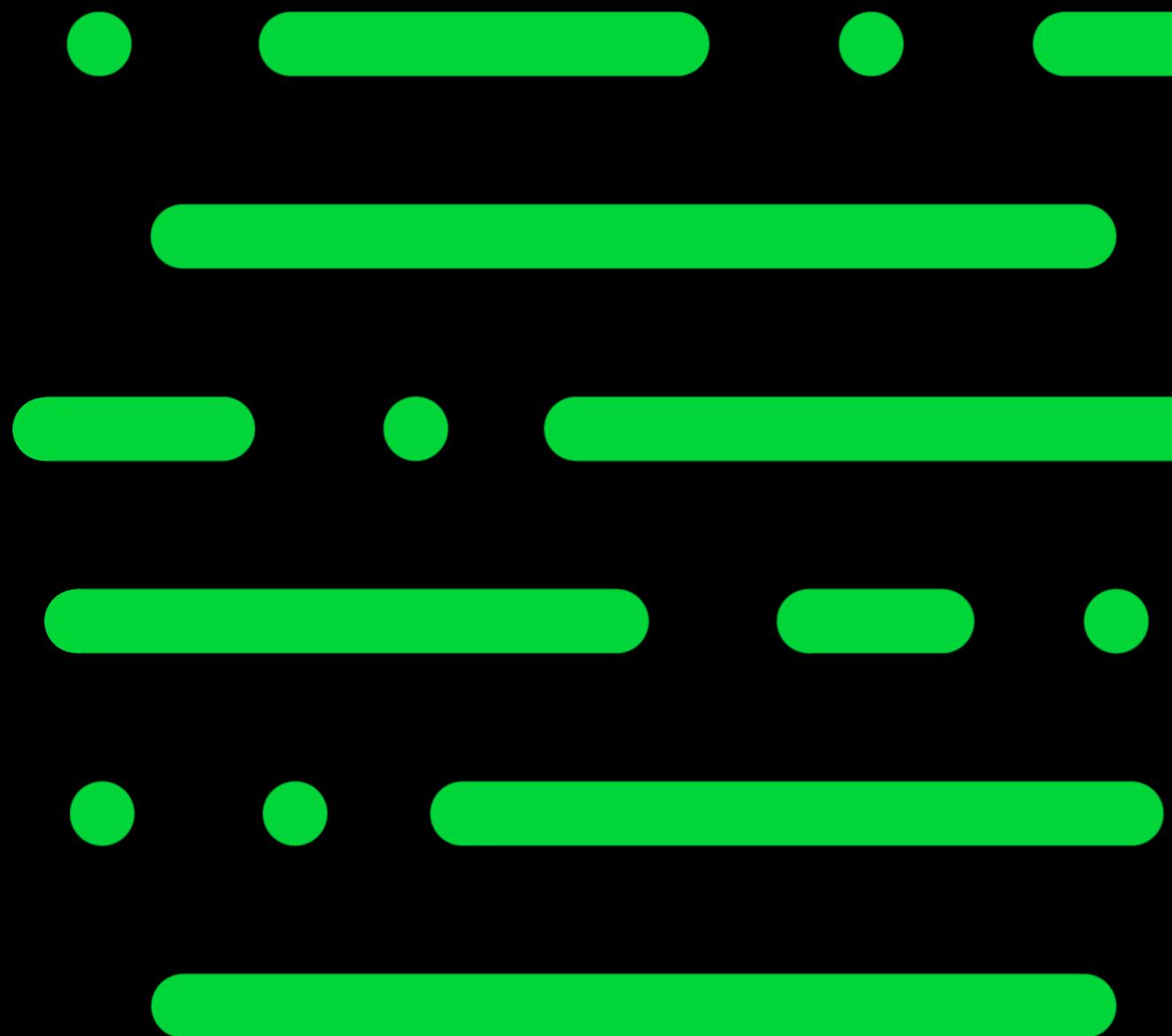


Source: CanadaHelps, <https://indd.adobe.com/view/763060b8-d8a0-48c9-8325-c9e619340e9a>

Polling Question #2

Which giving trend has impacted your organization the most over the past year?

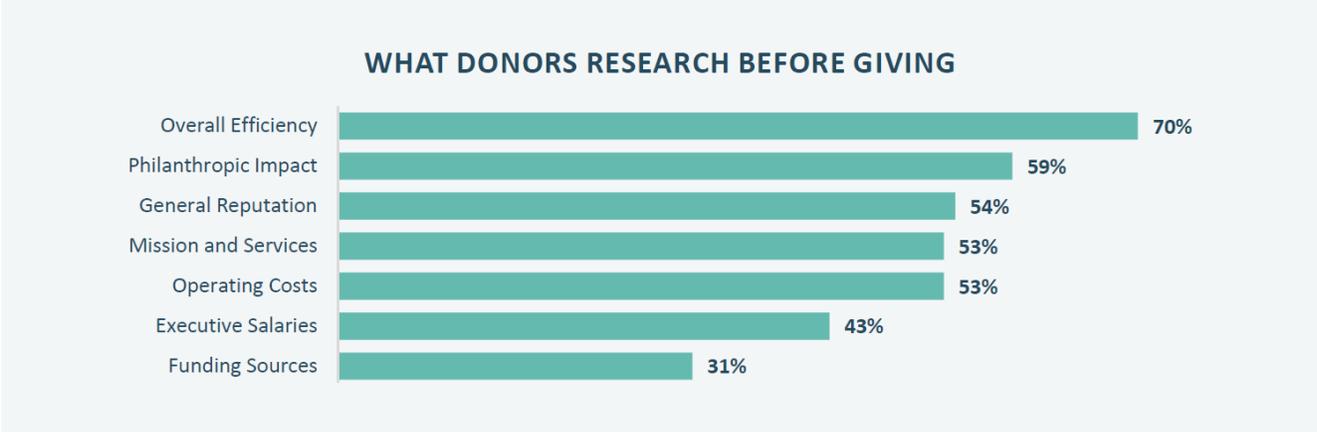
- Fewer donors giving larger amounts
- Shift in donor demographics
- Increased donor research before giving
- Pressure for more financial transparency
- No major impact noticed



Giving **insights** your organization needs to know

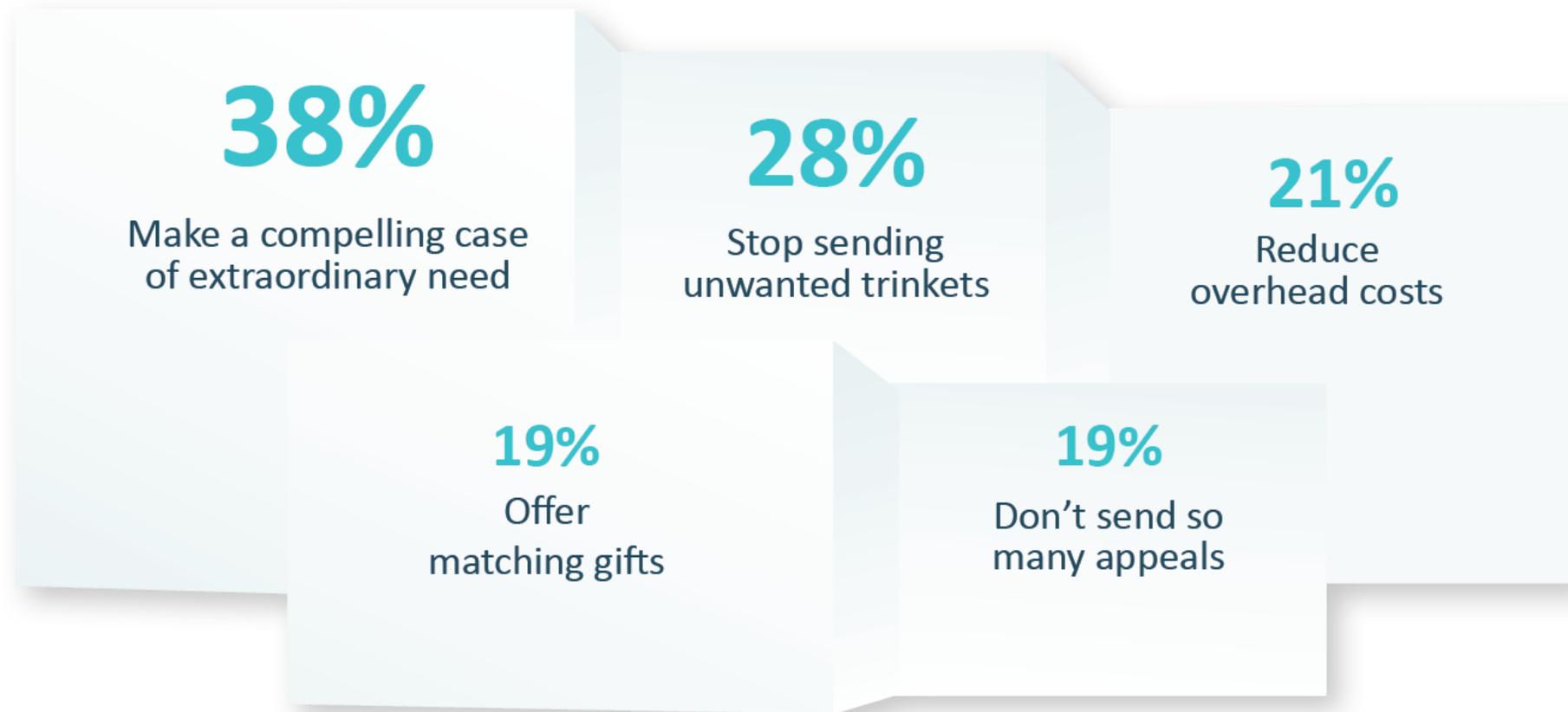


Most donors research orgs before giving



Source: CSS Fundraising, [Philanthropic Landscape Report, 10th Edition, 2021](#)

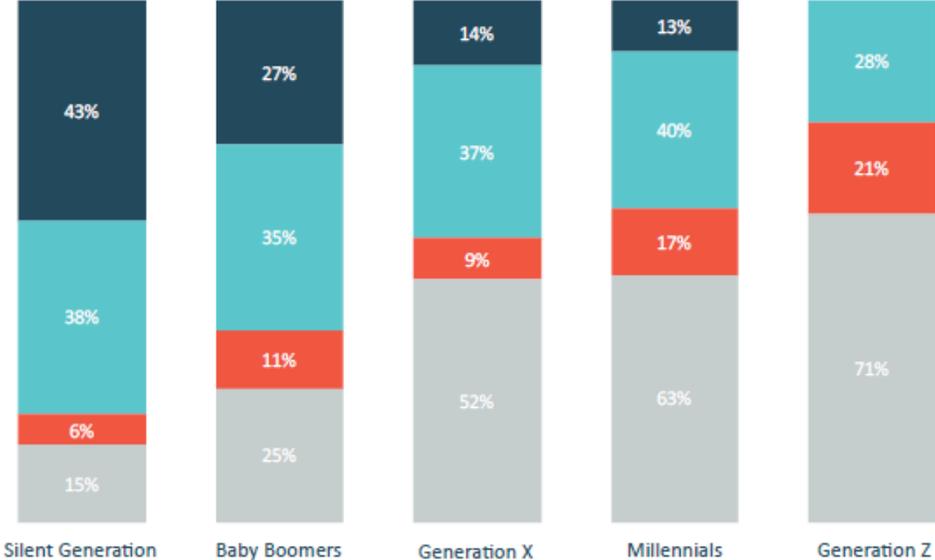
What donors say inspires more giving



Source: CSS Fundraising, [Philanthropic Landscape Report, 8th Edition, 2019](#)

Communication preferences

How they gave in 2017:

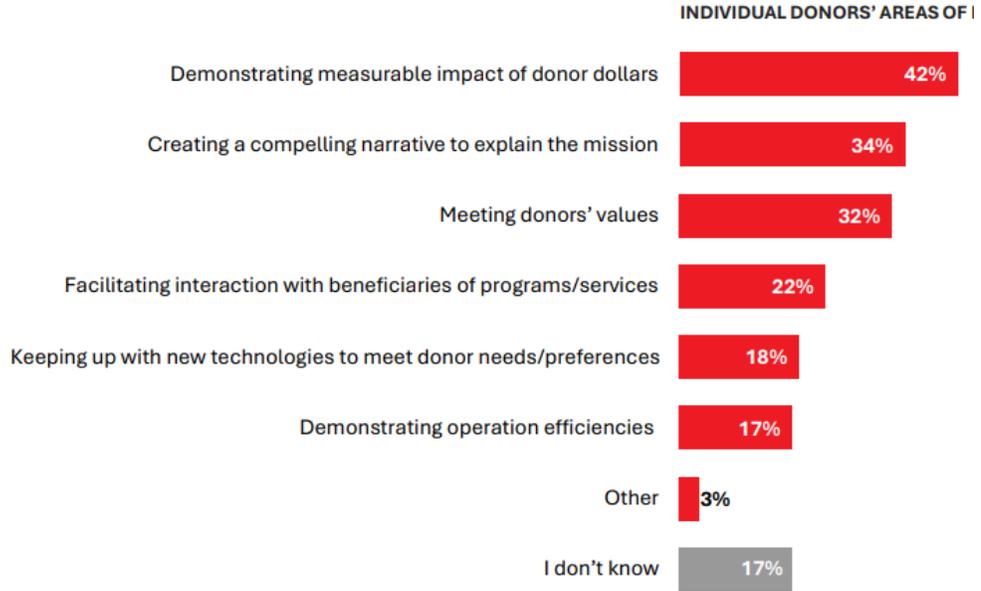


- Direct Mail - still favored by the oldest donors
- Website - popular with all generations
- Social Media - preferred by Generation Z and Millennials
- Smartphone - popular with Generation X and younger donors

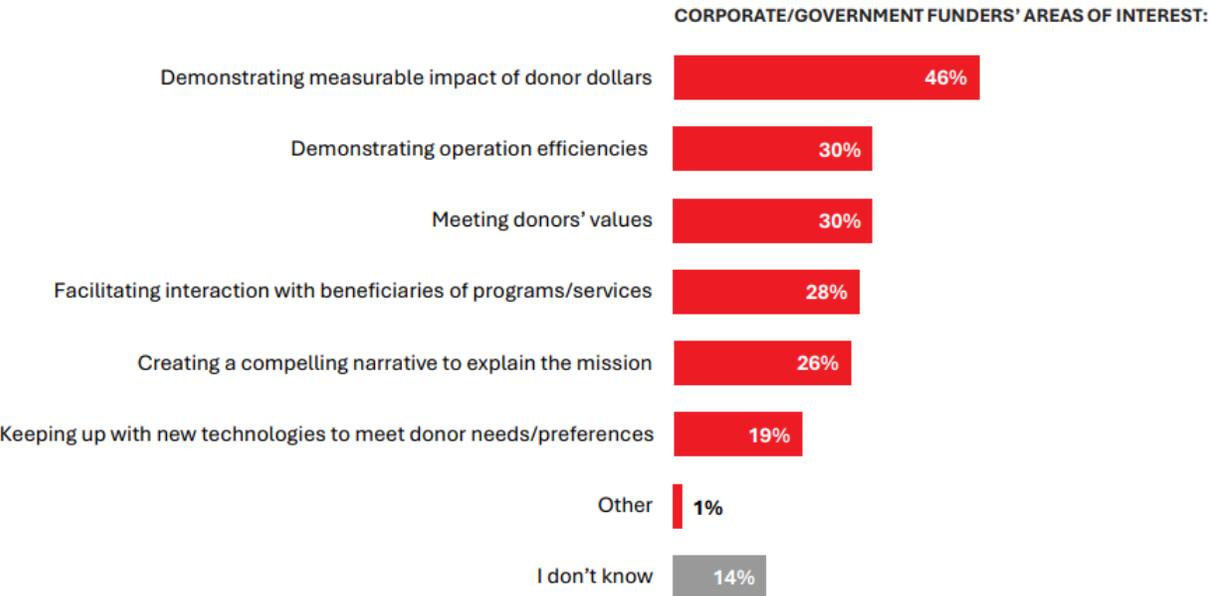
Source: CSS Fundraising, [Philanthropic Landscape Report, 8th Edition, 2019](#)

Funder areas of interest

When thinking about your **individual donors**, what are the top three reasons your individual donors donate to your organization?



When thinking about your **corporate or government funders**, what are the top three reasons your individual donors donate to your organization?



Source: Canada Nonprofit tech trends report 2025

Polling Question

#3

Which of the following is your biggest challenge when communicating your nonprofit's impact?

- Gathering reliable data
- Linking metrics to your Mission
- Telling a compelling story
- Limited technology/tools
- Lack of staff time or expertise

Best practices for sharing your story

The basics

Share the vision



Build the brand



Communicate the impact



Expand the reach

**Quickly
communicate
your mission**



Source: Juan Carlo / The Star

Carry your brand on your messaging

REAL FAMILY STORIES: GET TO KNOW WHO YOU'RE HELPING

Meet the Raj Family

When 8-year-old Vian was diagnosed with Lymphoma, RMH BC became a place to heal for the whole family.

[READ THE STORY →](#)

Meet the Kloosterschmuck..

When baby Harper was diagnosed with CDH before she was born, RMH BC became a home away from home for her family.

[READ THE STORY →](#)

Meet the Hawkes Family

When Ella was diagnosed with osteosarcoma at 7 years old, RMH BC was home for 10 months.

[READ THE STORY →](#)

[MEET MORE FAMILIES](#)

HOW YOUR DONATION DOLLARS HELP



IN ONE YEAR WE HELP UP TO

2000 FAMILIES



ELIMINATING DRIVING DISTANCE TO HOSPITAL

5-10 HOURS



WHERE OUR FAMILIES COME FROM

| | |
|------------|---------------------------|
| 26% | BRITISH COLUMBIA INTERIOR |
| 22% | VANCOUVER ISLAND |
| 24% | NORTHERN BRITISH COLUMBIA |

OUR MISSION

We give sick children the healing power of being together with family.

OUR VISION

A home away from home for all families facing a medical crisis.



DARE TO CARE
Compassionate



PERSPIRATION MAKES INSPIRATION
Dedicated



EMBRACE ALL HUMANS
Inclusive



BELIEVE WE CAN
Uplifting

charity: water

Clean Water Changes Everything

<https://www.charitywater.org/donate/the-spring>

charity: water WHY WATER? OUR WORK ABOUT US GET INVOLVED DONATE SIGN IN

THE SPRING

Join our community of monthly donors bringing clean water to people in need.

Choose an amount to give per month

\$10 USD/mo \$20 USD/mo **\$40 USD/mo** \$100 USD/mo Other amount

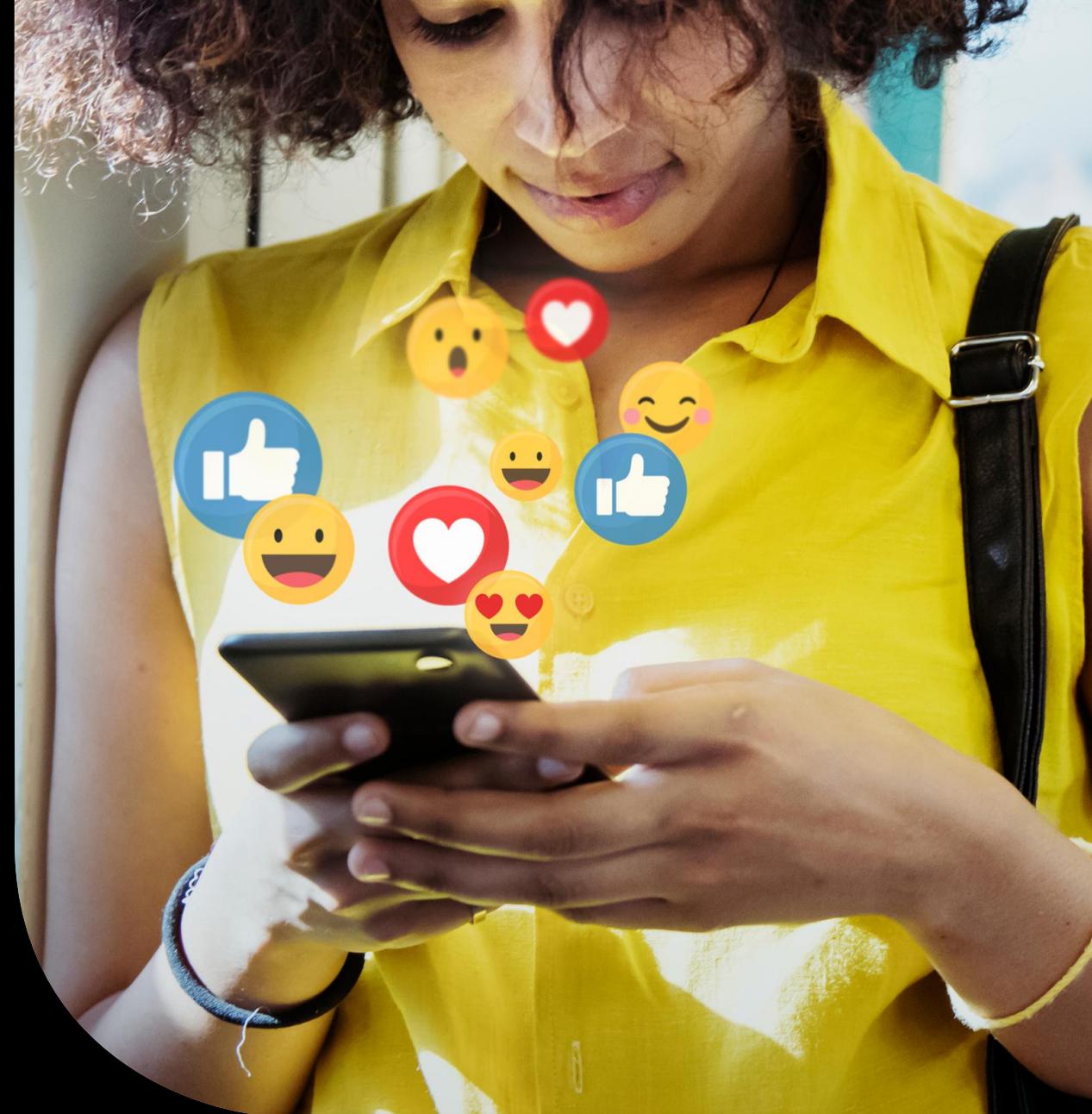
DONATE MONTHLY

Your \$40.00 monthly donation can give 12 people clean water every year. 100% funds water projects.

Your \$40.00 monthly donation can give 12 people clean water every year. 100% funds water projects.

Expand your reach with social media

- Post interactive content to build engagement
- Include hashtags to increase reach
- Use visuals to drive traffic
- Make it easy to donate
- Schedule social media posts in advance



Strengthen your story with data and performance metrics



Data and metrics make it powerful

charity: water DONATE

[Learn about Our Approach](#) [Learn about Our Solutions](#) [Learn about Our Partners](#)

Our Progress

We're passionate about solving the water crisis in our lifetime, using 100% of all public donations to fund water projects, and proving where every dollar goes with photos and GPS coordinates. Here's the progress we've made since we started working in 2006.

| | | | |
|--|--|-----------------------------|------------------------|
| 44,007 Water projects funded | 10,043,704 People will get clean water | 37 Local partners | 27 Countries |
|--|--|-----------------------------|------------------------|

[SEE OUR COMPLETED PROJECTS](#)

Where We Work

We fund water programs in 27 countries around the globe - in Africa, Asia, Central and South America. Water scarcity, poverty, political stability and strong partner organizations all play a part in where we choose to work. We focus on providing rural communities with their first access to clean water.



Transparency matters

charity: water [DONATE](#)

[READ MORE](#)

We prove every project
We track every dollar you raise, and show the projects you helped fund with photos and GPS.
[SEE PROOF](#)

We're an open book
We've consistently received the highest grades available for accountability and transparency.
[VIEW ALL FINANCIALS](#)

100% goes to the field
Private donors cover our operating costs so 100% of your money can fund water projects.
[LEARN ABOUT OUR MODEL](#)

Link Your Metrics to Your Mission and Your Financials

Reading Levels Achieved



Investment per reading levels achieved

Meals Served



Cost per meals served

Clean Water Wells



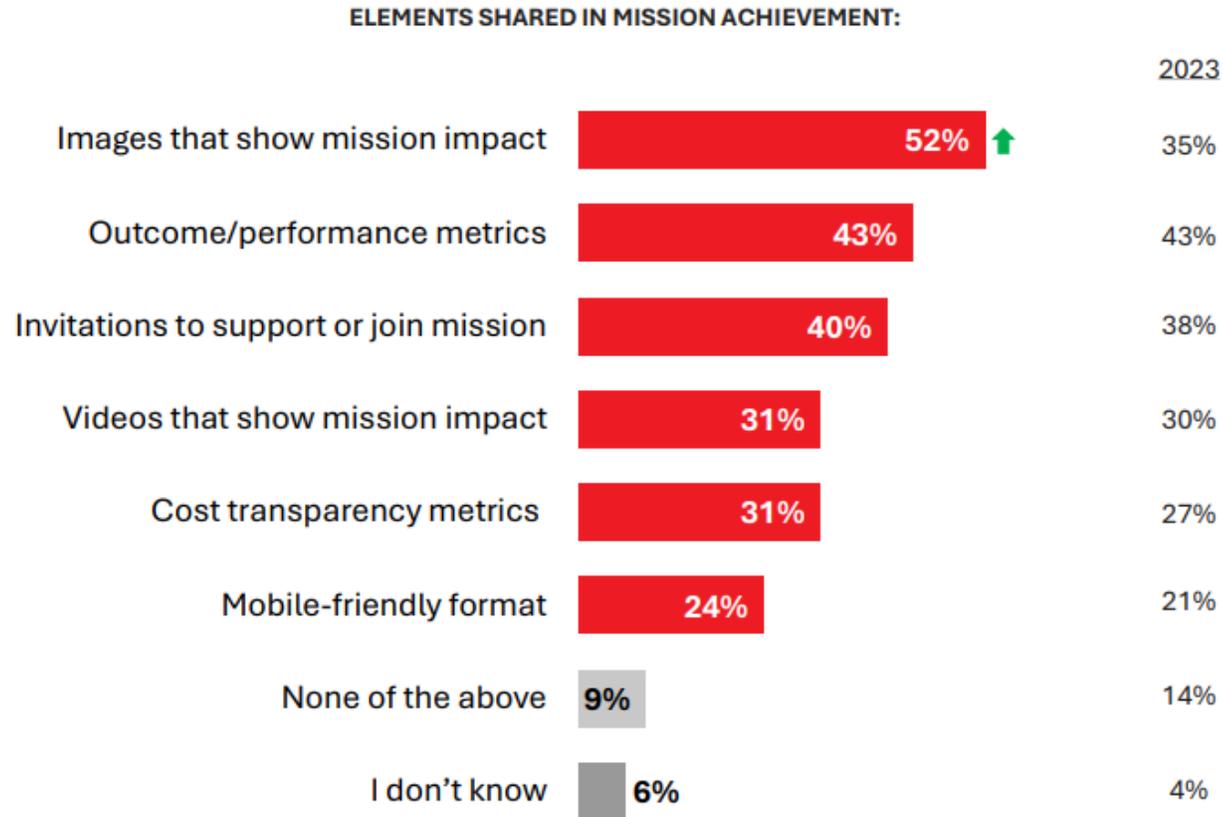
Clean water recipients per dollar spent

Patients Seen



Cost per patients seen per practice area

What are the elements that you use in sharing your mission achievement?



Source: Canada Nonprofit tech trends report 2025

Against Malaria Foundation Toronto

What we do | How we do it | Distributions | Transparency | Fundraise | Donate | News | About us



All distributions | Photos and Videos | How we make decisions | Information we publish | Planning horizon | Allocating donations | Distribution partners

Net distributions - World

Country: World
Partner: Any
Status: Any
 Only those with surveys
[go](#)

[View countries](#)



Distribution status
The bednet distribution programmes go through a number of different states from being manufactured to being installed over a head/bed:

- Pre-manufacture
- Being manufactured
- Ready at factory
- En-route to country
- Arrived in country
- En-route to zone
- Being distributed
- Distribution complete

Net condition

map Malaria endemic

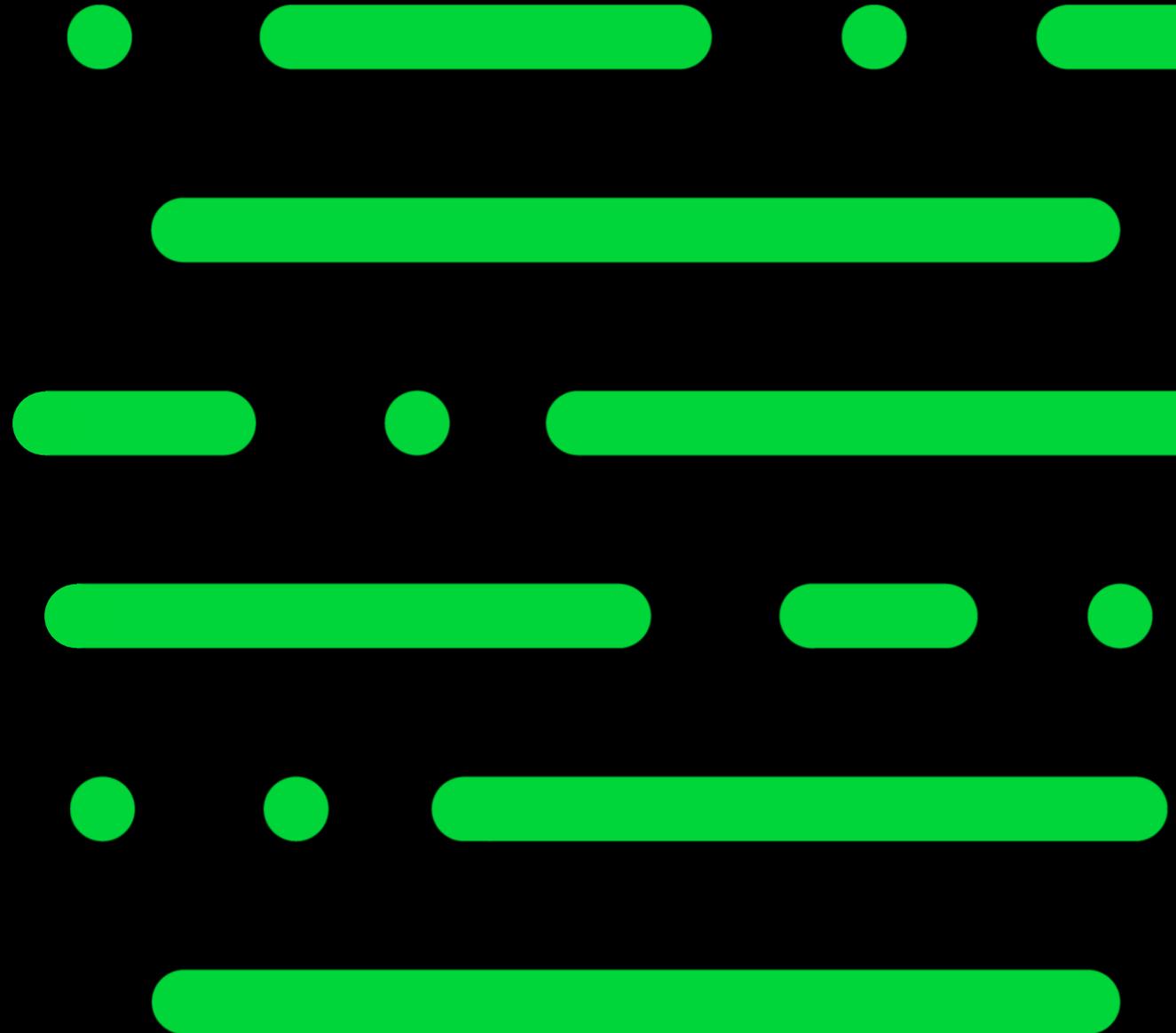
Distributions 1 to 20 of 240

| # LLINs | Location | Country | Date | Partner | Status | Surveys |
|-----------|------------------------------|-------------------|--------|------------|--------------|---------|
| 2,814,350 | Plateau State, 2027 | Nigeria | | | | |
| 4,206,300 | Benue | Nigeria | Dec 26 | NMCP/Vct. | NMCP/Various | |
| 4,437,550 | Ituri Province, 2026 | Congo (Dem. Rep.) | Jun 26 | NMCP/Vct. | NMCP/Various | |
| 4,876,700 | Bauchi State, 2026 | Nigeria | May 26 | NMCP/Vct. | NMCP/Various | |
| 2,396,800 | Lualaba Province, 2026 | Congo (Dem. Rep.) | Apr 26 | PNLP/SANRU | PNLP/SANRU | |
| 3,929,200 | Kongo Central Province, 2026 | Congo (Dem. Rep.) | Apr 26 | PNLP/SANRU | PNLP/SANRU | |
| 2,728,900 | Tshopo Province, 2026 | Congo (Dem. Rep.) | Apr 26 | PNLP/SANRU | PNLP/SANRU | |
| 2,221,450 | Sud Ubangi Province, 2026 | Congo (Dem. Rep.) | Mar 26 | PNLP/SANRU | PNLP/SANRU | |
| 2,993,200 | Haut Lomami Province, 2026 | Congo (Dem. Rep.) | Mar 26 | PNLP/SANRU | PNLP/SANRU | |
| 1,470,050 | Haut Uele Province, 2026 | Congo (Dem. Rep.) | Mar 26 | PNLP/SANRU | PNLP/SANRU | |
| 2,559,450 | Tanganika Province, 2026 | Congo (Dem. Rep.) | Feb 26 | PNLP/SANRU | PNLP/SANRU | |

Polling Question #4

Does your organization currently use a technology platform to track and report outcome metrics?

- Yes, and it's working well
- Yes, but it needs improvement
- No, but we are planning to implement one
- No, and no plans yet



Examples from Sage Intacct



Open Technology



[ABOUT THE MARKETPLACE](#)
[BECOME A PARTNER](#)

[MARKETPLACE HOME](#)

Welcome to the Sage Intacct Marketplace!

Best-in-Class business applications to extend your success in the cloud.

Search

FEATURED SOLUTIONS

- *Sage Recommended
- *New Marketplace Listings

INDUSTRY SOLUTIONS

- Construction & Real Estate (CRE)
- Field Services
- Financial Services
- Healthcare
- Hospitality
- Manufacturing
- Nonprofit
- Professional Services
- Retail
- Software & SaaS

FUNCTIONAL SOLUTIONS

- AP Automation
- AR Automation & Collections
- Budgeting & Planning
- CRM / AMS
- Document Management
- Ecommerce, EDI & Point of Sale
- Expense Management & Time Tracking
- Finance & Business Management
- Fixed Asset & Leasing

Canada

Sage Intacct Marketplace Partners with approved integrations for Canada

Sage Recommended Solution



Flexible Financing for Sage Intacct by Swoop

by: Swoop Funding

Finance your Sage software and implementation costs with Swoop.

Sage Recommended Solution



Sage Intacct Fundraising powered by DonorPerfect

by: Sage | Sage Intacct

Raise more for your mission with online fundraising software for nonprofits

Sage Recommended Solution



Sage Intacct Payroll powered by ADP

by: Sage | Sage Intacct

Unify Your Accounting, Payroll and HR

Sage Recommended Solution



Global Multi-Entity Payables Automation

Tipalti

by: Tipalti

Tipalti provides one end-to-end cloud-based global accounts payable automation solution.



DataBlend's Workday® Adaptive Planning Connection

by: DataBlend

DataBlend's Workday® Adaptive Planning and Sage Intacct



Velixo - Excel Reporting, Budgeting & Automation for Sage Intacct

by: Velixo

Significantly improve your reporting, automate your business, and boost your productivity.

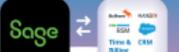
Sage Recommended Solution



Sage Recommended Solution



Connect Sage Intacct to your recruitment tech stack



Metrics that matter – in real-time

Sage Intacct Role-based Dashboard example

Role Based Dashboards - CFO

12/31/2018 | All departments | All funds | All project and grants

Key Metrics

- Fundraising Expense: 5% this year (-0 vs. prior year)
- Program Efficiency: 71% this year (+0 vs. prior year)
- Administrative Expenses: 23% this year (+0 vs. prior year)
- Fundraising Efficiency: \$0.17 this year (-\$0.06 vs. prior year)
- Average Donation: \$185 this year (+\$6 vs. prior year)

Program Financials

Statement of Revenue & Expenditures - By Dept Program - CFO View (P&L)

| | Services | | Programs | | Program Services | | Events | | All Departments | |
|--------------------|------------|-----------------|--------------|-----------------|------------------|-----------------|------------|-----------------|-----------------|-----------------|
| | Actual | Original Budget | Actual | Original Budget | Actual | Original Budget | Actual | Original Budget | Actual | Original Budget |
| Operating Revenue | 750,000.00 | 250,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 750,000.00 | 250,000.00 |
| Grant/Fund | 14,254.10 | 0.00 | 2,955.63 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 17,209.73 | 0.00 |
| Contributions | 0.00 | 0.00 | 1,793,330.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1,793,330.00 | 0.00 |
| Tuition | 47,303.71 | 0.00 | 526.23 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 47,830.94 | 0.00 |
| Membership Dues | 0.00 | 0.00 | 5,000.00 | 0.00 | 1,361,609.57 | 1,499,901.88 | 0.00 | 0.00 | 1,368,609.57 | 1,499,901.88 |
| Sales | 551,441.69 | 626,580.30 | 370,212.57 | 406,925.00 | 542,788.88 | 599,525.04 | 455,995.89 | 503,678.31 | 1,520,419.03 | 2,158,708.65 |
| Revenue - Services | 444,997.02 | 600,330.68 | 167,831.82 | 201,756.23 | 177,471.21 | 140,628.68 | 217,471.21 | 262,262.61 | 1,078,750.26 | 1,144,801.54 |

Operating Expense Breakdown

Budget v Actual

Funct. Exp with Budget v Actual with Commits

| Expenditures | Year Ending 12/31/2018 | Year To Date 12/31/2018 | Commitments | Remaining Budget |
|--|------------------------|-------------------------|-------------|------------------|
| | Actual | Actual | | |
| Operating Budget | 2,124,282.52 | 1,807,359.59 | 0.00 | 316,922.93 |
| Personnel Expenses | 1,999,423.21 | 1,865,011.72 | 0.00 | 334,411.49 |
| Professional Fees | 450,198.04 | 419,484.03 | 24,500.00 | 6,212.01 |
| Program Expenses | 595,592.55 | 553,584.72 | 0.00 | 42,037.83 |
| Occupancy | 93,135.59 | 84,262.70 | 0.00 | 8,872.59 |
| General and Administrative Expenses | 16,496.22 | 16,034.43 | 0.00 | 461.79 |
| Advertising and Promotion | 135,802.00 | 122,794.38 | 0.00 | 13,007.62 |
| Business Licenses and Permits | 140,857.69 | 162,956.29 | 0.00 | (22,098.60) |
| Conferences, Conventions, and Meetings | 304,737.23 | 194,556.16 | 0.00 | 110,178.05 |
| Insurance | 305,816.04 | 302,444.41 | 498.04 | 2,873.59 |
| Office Supplies | 305,816.04 | 302,444.41 | 498.04 | 2,873.59 |

Revenue Source

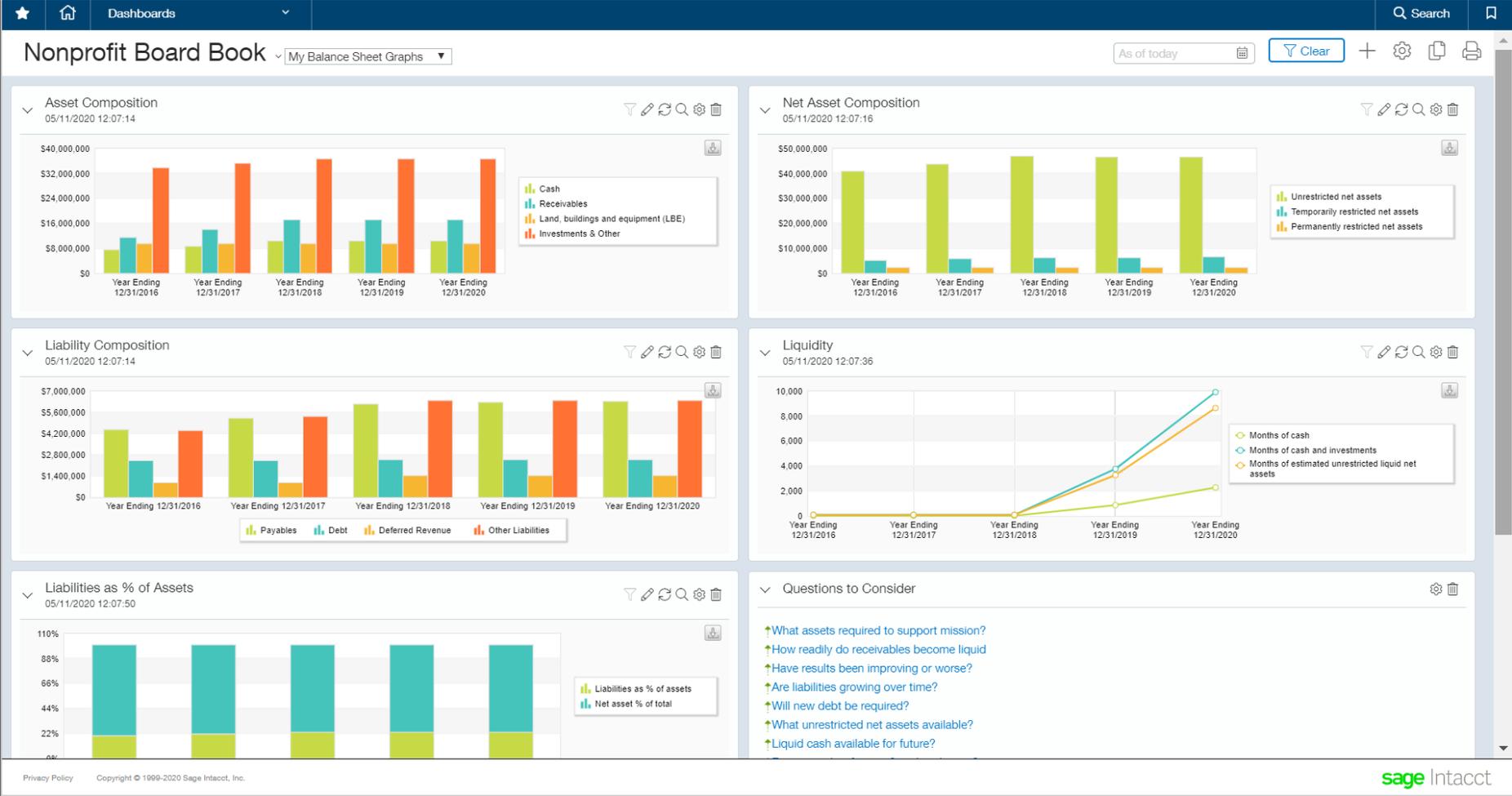
Revenue Sources

Statement of Revenues & Expenditures - Monthly Comparison

| | Month Ending 01/31/2018 | Month Ending 02/28/2018 | Month Ending 03/31/2018 | Month Ending 04/30/2018 | Month Ending 05/31/2018 | Month Ending 06/30/2018 | Month Ending 07/31/2018 | Month Ending 08/31/2018 | Month Ending 09/30/2018 | Month Ending 10/31/2018 |
|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|
| | Operating Revenue | 125,000.00 | 0.00 | 400,000.00 | 0.00 | 0.00 | 100,000.00 | 125,000.00 | 0.00 | 0.00 |
| Grant/Fund | 345,298.89 | 227,297.99 | 145,488.23 | 219,589.67 | 144,147.57 | 169,291.27 | 125,803.18 | 58,585.71 | 196,053.25 | 145,217.81 |
| Contributions | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 525.00 | 1,792,805.00 | 0.00 | 0.00 |
| Tuition | 16,311.00 | 17,101.71 | 17,736.84 | 17,805.76 | 18,248.04 | 16,911.16 | 18,147.33 | 17,652.36 | 17,175.78 | 17,392.23 |
| Sales | 107,824.98 | 106,595.80 | 114,080.71 | 115,147.00 | 117,354.63 | 108,751.08 | 122,149.44 | 113,517.56 | 112,379.39 | 111,844.68 |
| Revenue - Services | 150,057.39 | 150,197.61 | 160,711.47 | 162,242.06 | 165,352.56 | 153,230.19 | 164,431.11 | 159,946.17 | 155,627.87 | 167,589.03 |
| Investment Earnings | 108,809.00 | 110,025.91 | 114,886.33 | 114,234.27 | 115,821.73 | 110,263.72 | 78,301.84 | 114,535.45 | 87,439.62 | 112,262.23 |
| Other Revenue | 61,780.56 | 63,007.20 | 65,251.58 | 68,381.12 | 69,068.10 | 63,459.33 | 60,648.14 | 87,137.65 | 64,768.18 | 65,860.57 |
| Total Operating Revenue | 935,081.80 | 694,227.22 | 1,041,135.56 | 717,499.68 | 650,991.63 | 741,946.75 | 725,106.14 | 2,344,179.70 | 653,474.09 | 630,168.55 |

Data that transforms

Sage Intacct Nonprofit Board Book Dashboard example



Success Story

Hope's Home achieved **75% faster reporting processes** and a **paperless finance department**

“Demonstrating our operational excellence helps us compete for those limited funds and **propel our mission forward**. “We’re able to create the exact reports we need from within Sage Intacct. We can also easily share the reports with internal and external stakeholders, improving communication and collaboration. **It’s been really helpful to include statistical data, such as the number of children served, in those reports as well.**”

- Sudesh Galhenage, CFO



Success Story

Ronald McDonald's House cut days of data entry each month leading to **60%** increase in efficiency

RMH help up to **2,000** families in **one**
year

“Sage Intacct dimensions have been very helpful for us segmenting various reporting requirements. We have fund accounting where we need to segment restricted versus unrestricted funds. It's been very helpful to each department as well as to accounting for tracking details. **We're probably seeing a time savings of at least 30%.**”

- Yan-Yan Lee, VP of Finance



Polling Question #5

What would be your top priority for improving your organization's storytelling and reporting?

- Better data collection and reporting
- Investing in new technology
- Training staff on storytelling best practices
- Expanding our social media strategy
- Improving donor engagement and transparency

Sage Intacct

#1 Nonprofit financial management software

Seamlessly connected where it matters most – so you can tell your best performance story

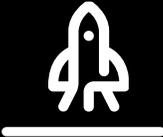


Recognized in Nonprofit

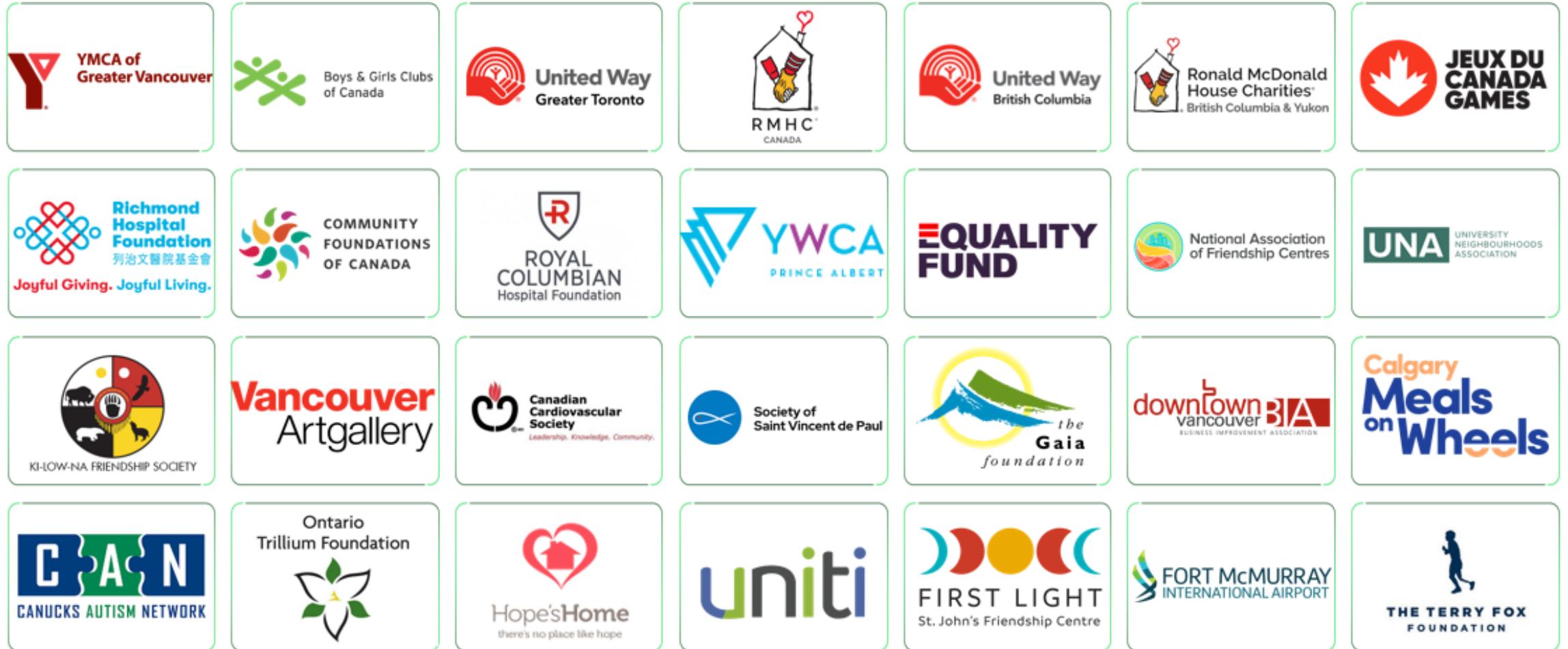
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 First and only preferred financial management solution of the AICPA

 Increase your time spent on strategic work by 75%

Successful nonprofits trust Sage Intacct



FY24 Community Impact in Numbers

159,714

Hours volunteered in our communities

12,900

Entrepreneurs supported

18,575

People upskilled to access further opportunities

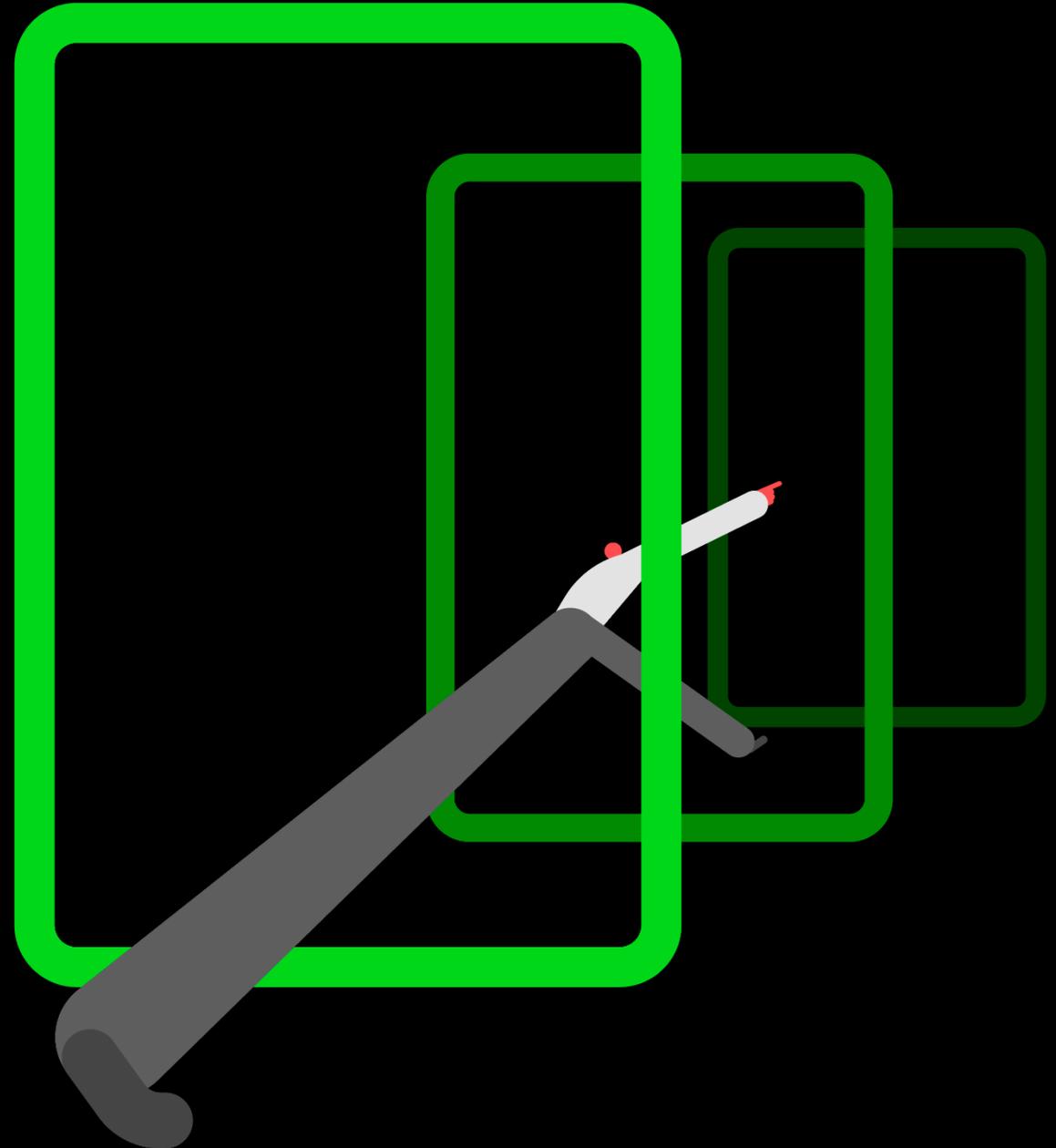
\$645K

**\$2,256,964.4
towards 2030**

Raised for non-profits around the world

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Thank you!

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