

Specialized Modules



Specialized modules can be added to any Sumac installation. Some provide the best support for services delivered by your organization. Others simplify internal management activities.

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Auctions



Overview

Auctions provide the unique opportunity to generate increased revenue while promoting awareness of the missions of non-profit organizations. Engrossing and entertaining, competitive bidding on desirable lots inevitably leads to greater personal involvement and interest in improvements implemented throughout the community.

Sumac Auctions keeps up with the pace of any auction, ensuring your staff can easily keep track of the proceedings, producing the most value from every available lot. Dynamic updates provide quick results and reports, creating more time to strengthen rapport and gather information about the participants in your organization's auction event.

Features

- ◆ Record vital details, such as donor, buyer, lot number, date, time and amount of the newest bid.
- ◆ Create up-to-the-moment reports, avoiding potential confusion for popular lots while maximizing bids.
- ◆ Determine the minimum bid and insurance value of an item before placing the lot in the auction.
- ◆ Protect bidders by limiting access to sensitive information, providing the discretion required for silent auctions and large, conspicuous bids.
- ◆ Integrate with Sumac Contacts and Communications to add to the overall knowledge base, forming a broader, more detailed portrait of your community.
- ◆ Integrate with Sumac Payment Processing to rapidly clear credit card payments.



Auditions & Submissions



Overview

Non-profit organizations that request or receive submissions for artistic and community-based programs have a specific set of challenges during the auditioning or judging process. Detailed analysis of the submissions is important to find the most appropriate submissions or most qualified people to match the requirements of your program.

Support these activities with Sumac Auditions & Submissions to streamline management of applications and proposals for festivals, service programs and other events. Frequently, program participants convert to loyal contacts for your organization. Sumac assists your staff with converting these contacts into donors, volunteers and attendees for future events.

Features

- ◆ Ensure timely project management with tracking and reporting tools.
- ◆ Monitor project status, contents, applicants and scheduled deadlines with ease.
- ◆ Organize auditions for performing arts organizations, tracking information such as audition materials, time, location, status and genre.
- ◆ Log proposals for literary, visual arts, and film festivals to identify the appropriate talent for your organization.
- ◆ Track the agent of a contact and specific details for an audition or proposal, including status, title, date received, running time, cast requirements, technical needs, discipline, medium and draft levels.
- ◆ Integrate Auditions and Submissions into your contact list, turning program participants into donors and volunteers.



Course Registration



Overview

Some non-profit organizations extend their mission to the community by offering instruction to improve knowledge in different fields. Tracking information such as prerequisites, attendance, calendars, grades, class sizes and course lists is the cornerstone of successful educational institutions.

Sumac Course Registration provides your staff with the functionality needed to eliminate the tedium of processing piles of paperwork. An effective structure of courses creates a greater sense of community involvement with your organization, increasing interest in future donations and volunteer work.

Features

- ◆ Define courses, including detailed syllabus description, location, date and time, prerequisites and grade level.
- ◆ Enable students to view and change their own course selections.
- ◆ Specify student and course grade levels, preventing applicants from using Sumac to select inappropriate courses.
- ◆ Track funding sources for each student.
- ◆ Produce class lists to view student enrollment for each course.
- ◆ Record and track attendance at classes and marks for each assignment, test and exam.
- ◆ Generate reports including courses for each student, attendance records and student summaries.
- ◆ Enforce the maximum number of students allowed in each course by locking courses for which registrations are no longer permitted.



Fund Requests



Overview

In addition to donations, pledges and other gifts, financial support for non-profit organizations is often secured through funding from government, business, and private foundations. Competition for these funds is tight, demanding a sophisticated approach in order to win support from influential programs.

Sumac assists your staff by building a detailed database of each funding program, enabling a better understanding of application requirements for various funders. Sumac Fund Requests helps to build a structured, step-by-step approach to winning funds while tracking the effectiveness of staff activity, allowing an in-depth analysis of results when planning future requests.

Features

- ◆ Build a profile of government agencies, corporate and private foundations that fund non-profit organizations.
- ◆ Build descriptions of various funding programs operated by each funder, including objectives, application schedule, grant sizes, and related contacts.
- ◆ Record vital information about each funding program including fiscal year, assets, annual distributions and relevant contacts for communication and applications.
- ◆ Record all application outcomes to provide the information necessary for subsequent analysis.
- ◆ Compare previous programs or funder applications to identify key success factors.
- ◆ Review your history of success with different programs, comparing amount requested with amount received.
- ◆ Integrate with Sumac Reminders to dynamically track applications while getting regular reminders of upcoming deadlines and events.



Job Search



Overview

Non-profit organizations that provide social services in the field of employment placement must navigate through a complex series of hurdles to guarantee the best results for their clients. Not only must the prospective employee meet the employer's requirements, the employer must also be suitable for the applicant's skill set and background.

Sumac takes care of all the data management associated with finding employment, allowing your staff to easily track and compare the unique skills of job seeking clients with the specific demands of employers. Sumac Job Search facilitates the entire process, including distribution of your client's cover letter, resume and portfolio through automated email systems.

Features

- ◆ Enable employment counsellors to connect their clients with appropriate job opportunities.
- ◆ Identify contacts who are searching for a job and describe their skills and availability.
- ◆ Match the skills required to fill an employment opportunity with the abilities of potential candidates.
- ◆ Link vital documents such as resumes, covering letters and references for potential candidates.
- ◆ Record the details of employment opportunities such as company name, pay, location, hiring manager, skill requirements and accessibility to public transit.
- ◆ Instantly gather materials for all candidates for a job, and send them with a covering email to hiring managers.
- ◆ Document the outcome of various applications to see job opportunities and candidates matched through your organization.
- ◆ Integrate with Sumac Reminders to track each hiring situation.



Memberships



Overview

Many non-profit organizations offer multi-level membership programs to raise funds while offering special access to benefits unavailable to the general public. This leads to an increase of funding that fosters a sense of ownership in the mission.

Sumac Memberships streamlines the handling of multi-tiered member programs, automatically processing payments, renewals and benefits instead of using staff resources to sort through stacks of information. Built-in reports are used to increase new members and prevent lapsed commitments, creating a stronger, more involved membership base.

Features

- ◆ Manage many user-defined membership types, rates and associated benefits for each level.
- ◆ Process and acknowledge new memberships and donations with automated ease, allowing for rapid administration of member benefits.
- ◆ Generate a strong referral program using Sumac's relationship tracking features to prospect for new members and donors.
- ◆ Produce customized renewal invoices, reminders, membership packages and membership cards.
- ◆ Link Sumac to your accounting system to eliminate double-entry and keying errors.
- ◆ Plan cash-flow and workloads for heavy member renewal months using built-in reports.
- ◆ Maintain complete renewal history for each member.
- ◆ Track membership status with ease, including renewals, lapsed memberships and potential upgrades.
- ◆ Create comprehensive membership directories for distribution electronically or in print.
- ◆ Integrate with Sumac Email to save money and reduce paper use by distributing member newsletters and renewals via email.
- ◆ Integrate with Sumac Payment Processing to automate the collection of renewal fees.



Multiple Databases



Overview

Managing multiple databases is essential for organizations that juggle multiple locations and identities or provide data management services to a variety of clients.

Sumac Multiple Databases enables arts service organizations to securely manage separate databases for each client. National umbrella organizations can use Sumac to centralize data management while providing the functionality of Sumac to regional offices. Service providers can make Sumac available via an SaaS (Software as a Service) business model.

Multiple Databases easily extends the power of Sumac to work across multiple databases.

Features

- ◆ Back up and manage multiple databases from a central location.
- ◆ Define uniform data attributes for all managed databases.
- ◆ Create each subsidiary database with a simple dialog and a few clicks.
- ◆ Each subsidiary database operates exactly like a regular Sumac installation.
- ◆ Search to find databases for different types of organizations.
- ◆ Search in selected databases simultaneously to find contacts satisfying search criteria.
- ◆ Use mail merge to generate personalized letters and labels for contacts in several databases.
- ◆ Send personalized email messages to multiple contacts in several databases.



Pledges



Overview

Establishing a stream of recurring donations is a powerful method to secure necessary funds for many non-profit organizations. Steady, predictable revenue creates a financial base that allows organizations to thrive and flourish, increasing the positive influence of your mission in the community.

Sumac provides powerful research tools that help identify then follow through on your most promising prospects for recurring or one-time pledges. Automated payment processing eliminates the work of repeatedly entering recurring pledge payment details, allowing staff to focus on obtaining new donors and pledges for continued financial support.

Features

- ◆ Convert loyal annual donors to monthly giving programs, raising more money with greater consistency.
- ◆ Identify your best donors and prospects for monthly gift programs using built-in, analytical reports.
- ◆ Record and process pledges with ease.
- ◆ Automate pledge payment processing.
- ◆ Track variable pledge schedules including fixed length, ongoing and one-time major gifts.
- ◆ Prevent lapsed pledges using delinquency reminders and reports while flagging soon-to-expire credit cards.
- ◆ Monitor start and stop dates for pledges while issuing timely renewal reminders.
- ◆ Reduce donor attrition and costs for renewal campaigns using automated reporting processes.
- ◆ Schedule and produce combined tax receipts annually or on schedules determined by your organization or donor preferences.
- ◆ Built-in revenue projection reports support program analysis and cash flow planning.
- ◆ Create pledges that can be earmarked for a specific fund.
- ◆ Identify pledges that occurred as a result of a specific campaign or event, providing a more complete picture of the effectiveness of specific fundraising strategies.



Proposals



Overview

Occasionally, non-profit organizations are presented with unique funding opportunities presented by those willing to donate large sums of money or property. Understanding the assets and preferences of donors bestowing large gifts is fundamental to winning their support.

Sumac generates sophisticated proposals, also known as illustrations, for planned giving and large gifts that fall outside the routine of campaign-driven asks, allowing your staff to customize a strategic approach. Sumac Proposals analyzes specific assets for any gift scenario, creating an optimal presentation of your organization's propositions and increasing the effectiveness of your illustrations.

Features

- ◆ Define planned giving and large gift criteria with all the input data, calculations and generated documents needed to support these illustrations.
- ◆ Perform all the necessary calculations rapidly, creating a proposal or illustration document with ease.
- ◆ Use pre-calculated tables to perform sophisticated planned giving calculations involving life expectancy, annuities, taxes and other criteria.
- ◆ Employ spreadsheet functions such as present value and net present value to perform standard financial and tax calculations in formulas.
- ◆ Investigate different scenarios for specific types of gifts to find and propose the most appropriate one for the situation and donor.



Prospecting



Overview

Every non-profit organization needs help from time-to-time in order to expand and increase donor stewardship and support. Steady growth requires focused prospecting for the right individuals to fill various roles, including potential board members, volunteers and large donors. Initiating a complex search requires superb data management and software that make it easy to express your organization's needs in a searchable format.

Sumac Prospecting supports your staff by performing the many complex calculations based on information already gathered and stored in Sumac, sifting through inappropriate results and providing the desired outcome. Sumac performs all the tedious work for your staff to better understand your prospects, focusing on those with the most potential to solicit greater funding and support for your mandate.

Features

- ◆ Analyze donation patterns, event attendance and communications to determine the level of commitment to your organization.
- ◆ Produce a giving score for each contact based on different types of donations.
- ◆ Evaluate each contact's capacity to make donations based on information about known assets, major gifts, pledges and donations to other charities.
- ◆ Calculate a score for the extent of any contact's network of friends, relatives or associates.
- ◆ Combine different calculations to create an overall score and percentile for each contact.
- ◆ Find prospects for a moves management effort to get donors to donate more.
- ◆ Find prospective large donors for a capital campaign.
- ◆ Adjust individual scores manually if you possess external information that is not stored by Sumac.
- ◆ Define and use as many different custom ratings as you want, searching for potential donors, volunteers and board members simultaneously.



Reminders



Overview

The operation of a non-profit organization requires the orchestration of countless activities. Delivering your mission to the community with success, as well as raising the funds needed to achieve your mandate, requires consistently organized action from Executive Directors to staff and volunteers.

Sumac Reminders furnishes your team with the ability to determine a series of pre-planned steps, executed when soliciting funders, performing membership renewals, introducing new volunteers and any other multi-step actions. Sumac Reminders also facilitates mission-based activities smoothly, increasing the effectiveness of the beneficial operations performed by your organization within the community.

Features

- ◆ Build activity plans, defining a series of scheduled actions performed to accomplish a particular task, such as introducing a new volunteer or staff member, tracking a funding application or moving a prospect up the donation pyramid.
- ◆ Track and plan each move with a prospect or donor including research, networking, emails, phone calls, letters, proposals, face-to-face meetings and planned events.
- ◆ Standardize interaction plans that take your prospects along the quickest route from a prospective donor to a major donor or monthly pledge.
- ◆ Maintain an unlimited schedule for any prospect and assign actions to staff, board, solicitors and volunteers.
- ◆ Print, email or view reports of pending actions for both individual and staff assignments.
- ◆ Automatically display outstanding reminders whenever Sumac is launched.
- ◆ Automate recording of all actions, pending and completed, in detailed contact and communication records.
- ◆ Integrate with Sumac Fund Requests to effectively manage the process of applying for funding.



Sales



Overview

Sales of goods and services are significant fundraisers for many non-profit organizations and can also be used as effective promotional tools. Sales may also be central for organizations delivering specialized services to the community at subsidized prices.

Sumac Sales streamlines complications such as taxes, shipping, discounts, premiums and pricing tiers, giving your staff the ability to rapidly apply secure, customized solutions for issues relating to the sales of goods and services. Sumac Sales integrates into the overall functionality of the software, completing the portrait of your relationship with the community.

Features

- ◆ Define products and services that can be sold.
- ◆ Manage tiered price schemes including discounts and promotions.
- ◆ Support pricing structures such as fixed or percentage discounted pricing.
- ◆ Configure taxes, service charges and gift certificates with ease.
- ◆ Accept donations at the point of purchase, integrating them into a single payment transaction.
- ◆ Access customer information instantly, looking up membership, donation, sales, history and other information.
- ◆ Report on sales in any time period by service, product or purchaser.
- ◆ Assign data access rights for users to control the use of sales and pricing adjustment privileges.



Ticketing



Overview

Performing arts organizations sell tickets to their presentations. Other non-profits run special events: openings, galas or fundraising dinners. These events may be central to a non-profit's mission, or may support it by informing and generating support from the community.

Sumac Ticketing helps your organization manage the details of ticket sales such as payment processing, seating assignment and ticket printing, streamlining the efforts of your staff with a single, customizable solution. Instead of resolving ticketing complications, staff can spend time developing rapport with event attendees.

Features

- ◆ Distribute single tickets and group packages for box-office events such as fundraisers, performances, lectures and galleries.
- ◆ Configure taxes, service charges and discounts as well as gift certificates, general admission and assigned seating with ease.
- ◆ Manage tiered price schemes including promotions and fixed or variable percentages for discount pricing.
- ◆ Accept donations at the time of purchase, integrating them into a single payment transaction.
- ◆ Avoiding ticketing conflicts with dynamic updates that inform multiple users of potential issues.
- ◆ Print traceable, user-customized tickets.
- ◆ Assign seating for theatres, performances and special event tables with interactive venue maps.
- ◆ Instantly access customer information during the sale, from preferred seating and previous attendance to membership status and donor history.
- ◆ Provide useful show information to your staff, including directions and links to press releases and promotional materials.
- ◆ Perform box-office reconciliation with built-in reporting tools.
- ◆ Block seats for special uses such as VIPs, press, and handicapped access.
- ◆ Integrate with Sumac Payment Processing to instantly collect credit card payments.



Tour Booking



Overview

Some non-profit organizations manage tours. Some send professional speakers to venues across the country. Some present plays or other artistic or socially motivated events in school classrooms. These tours may be central to a non-profit's mission, or may support it by informing and generating support from the community.

Sumac Tour Booking helps your organization design tour programs, schedule and book performers and venues, and do the necessary bookkeeping and follow-up. Sumac brings together program design and preparation, booking, day-of details, financial, and follow-up information.

Features

- ◆ Develop and store detailed requirements for a tour program or workshop.
- ◆ Manage all contacts involved with tours, including teachers, performers, venues, bookers, partners, sponsors and funders.
- ◆ Avoid conflicts and other scheduling problems by viewing all scheduled workshops in an intuitive calendar.
- ◆ Capture all costs including staff, travel, and materials.
- ◆ Generate invoices and track payments.
- ◆ Record feedback from any source, including teachers, performers, students, for all programs and workshops.
- ◆ Track program funders and sponsors, linking their contributions to concrete results.
- ◆ Integrate with Sumac Fund Requests to track successful fund requests and how the funds were used.



Volunteers



Overview

Selfless donations of time and effort from volunteers express the altruistic nature of non-profit organizations striving to benefit the community. The importance of volunteer work makes it imperative that their efforts are used efficiently. This requires careful matching of volunteer skill, availability and task preferences to ensure that volunteers are given the appropriate tasks.

Sumac Volunteers supports your staff by streamlining all the necessary organizational duties, providing visually-based charts that compare the needs of various tasks with the abilities and preferences of individual volunteers. Sumac eases the entire process, from recruitment and analysis to performing necessary tasks and thanking those who donate effort, making sure volunteers never feel unappreciated or ineffective.

Features

- ◆ Manage and record qualifications and skills of each volunteer or staff member.
- ◆ Assign tasks and track the status throughout the entire cycle of the assignment, as a volunteer is notified, performs the task and receives recognition for service.
- ◆ Define tasks and relate them to a department, program or event, assigning each task to an internal coordinator.
- ◆ Track the validation of qualifications and when they require re-validation.
- ◆ Create templates for frequently repeated tasks, enabling rapid definition and distribution.
- ◆ Organize volunteers by types and the group of tasks they are able or willing to perform.
- ◆ Construct open-ended tasks (on-going over weeks or months) as well as those at a specific date and time.
- ◆ Indicate qualifications required to perform each task and at a glance find the most appropriate person to complete the job.
- ◆ Record the amount of time worked on various tasks, relating it to the programs and individuals involved with your mission.
- ◆ Use pre-defined and *ad hoc* reports to analyze your volunteer data.
- ◆ Integrate with Sumac Reminders to create action plans for induction and training of new volunteers while guiding them through complete task cycles.

