

EFFICIENCY, ENGAGEMENT & OPPORTUNITY



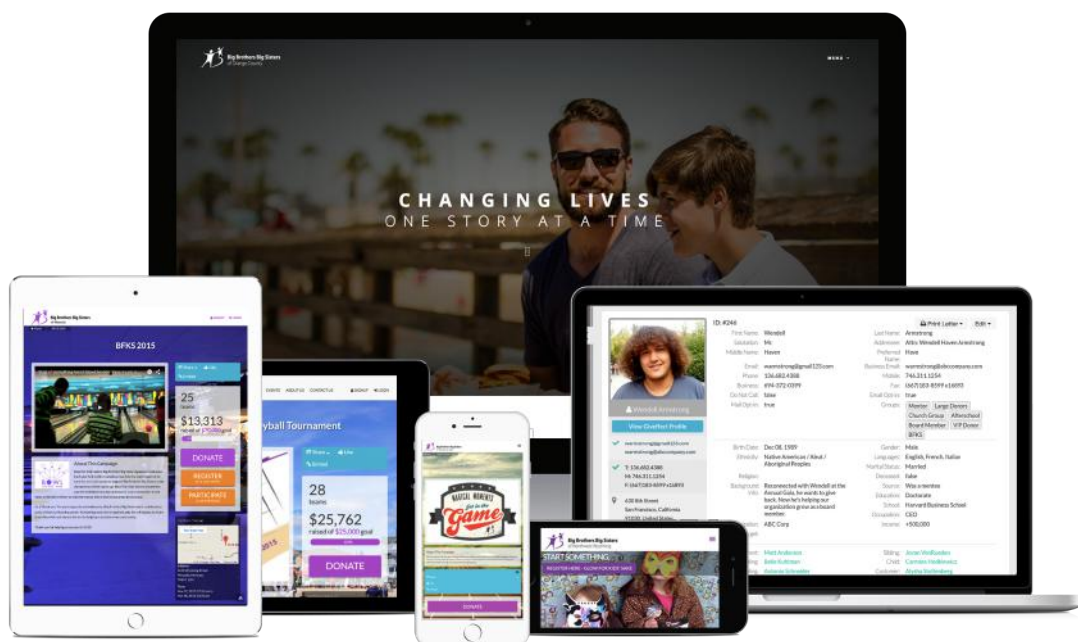
**EMPOWERING YOUR BOARD &
BEYOND FOR SUCCESS**



OVERVIEW

Founded in 1994, Unicorn Children's Foundation is dedicated to building communities of acceptance, support and opportunity to help kids and young adults with special needs by creating and funding cradle to career initiatives. With programs that include a special needs high school, a support line to connect families with necessary resources, a mobile clinic that provides free screenings and parent referrals for at-risk children can receive treatment at the earliest age possible and so much more, the small but mighty staff at Unicorn Children's Foundation must be laser-focused on their mission to support the neurodevelopmental community. However, they found themselves mired in paperwork and daily tasks—taking precious time away from the organization's mission.

Prior to Giveeffect, the Unicorn staff was using FIVE different software systems. According to CEO Sharon Alexander, the systems weren't truly integrated. Additionally, the staff struggled to collect full views of volunteers and donors and were working primarily from spreadsheets, which made data visualization increasingly difficult. In short, these five disparate systems were hindering the Unicorn staff from truly showing impact and engaging with board members, volunteers, donors and other constituents. Enter Giveeffect. Not unlike most nonprofits, the Unicorn Children's Foundations staff was using FIVE different software systems, including DonorPerfect for donations, DonorDrive for event fundraising, along with a separate systems for email, payments and more. According to CEO Sharon Alexander, the systems weren't truly integrated, which left the organization with incomplete data, fund reconciliation issues and an inefficient workflow. This hindered the Foundation from truly showing impact and engaging with organization board members, volunteers, donors and other supporters. Enter Giveeffect.



A MODERN CONTACT & RELATIONSHIP MANAGEMENT SYSTEM FOR THE MODERN NEEDS OF NONPROFITS

At the heart of Unicorn Children's Foundation's success with Giveeffect is their use of Giveeffect's Contact & Relationship Management System. From the Board to volunteers and donors, Giveeffect's software solution radically changed the way the organization functioned daily. Built to put all supporter and constituent information quickly and easily at your fingertips, the CRM is among the most powerful parts of the Giveeffect system. It is comprised of the following systems: the Contact & Constituent database, Donor Management, Volunteer Management, Member Management, Major Gifts Tracking and Screening, and Grant Management. While other nonprofit management systems support many or all of these same things, they often make these connections using systems that are not fully integrated or that require users to traverse multiple systems.

Giveeffect, consequently, offers true data integration across of all of its 10 core systems. In short, every action taken on an organization's website is recorded in the CRM—from donations to volunteer sign-up, newsletter subscriptions and more. These actions build a wealth of data in constituents' profiles that can be leveraged in a variety of ways to improve your organization's efficiency and overall performance.

The screenshot displays the Giveeffect CRM interface, which integrates data from 10 core systems. The top section shows a constituent profile for Wendell Armstrong (ID #246). The profile includes a photo, contact information, and a detailed history of interactions. Below the profile, there is a dashboard with various statistics and charts.

Constituent Profile: Wendell Armstrong (ID #246)

- First Name:** Wendell
- Last Name:** Armstrong
- Address:** 1234 Main St, San Francisco, CA 94102
- Phone:** 415-555-1234
- Email:** wendell@giveeffect.com
- Work Email:** wendell@giveeffect.com
- Mobile:** 766-211-1234
- Work:** 766-211-1234
- Do Not Acknowledge:** False
- Do Not Opt In:** False
- Legacy Key 2:** False
- Groups:** 2017 Applicants, 2017 Donor, Annual Statements only, Dog Trainers, Newsletter Distro, Event Volunteers, Food Bank Clients, Guest Families, Lecture Attendees, Membership, Monthly Photo Program, Restaurants, S&P only (each a year), VIP Donor
- Notes:** Reconnected with Wendell at the Annual Gala, he wants to give back. Now he's helping our organization grow as a board member.
- Birth Date:** Dec 08, 1989 (28 years old)
- Gender:** Male
- Ethnicity:** Native American / Alaska / Aboriginal Peoples
- Language:** English, French, Italian, French/Italian, Italian
- Marital Status:** Married
- Male's Name:** Wendell
- Decedent:** False
- Source:** Board
- Education:** Doctorate
- School:** Harvard Business School
- Graduation Year:** ABC Corp
- Organization:** ABC Corp
- Income:** <\$50,000
- Vehicle:** about:src=wendell@giveeffect.com
- Facebook:** facebook.com/wendell@giveeffect.com
- Twitter:** twitter.com/wendell@giveeffect.com
- LinkedIn:** linkedin.com/in/wendell@giveeffect.com
- Emergency Contact Name:** Ellen Greenfield
- Emergency Contact Phone:** 1-730-251-6536 x3433
- Emergency Contact Email:** wendell@giveeffect.com
- Emergency Contact Relationship:** Spouse
- Emergency Contact Gender:** Female
- Emergency Contact Marital:** False
- Emergency Contact Respected:** False
- Emergency Contact Hours:** 0
- Volunteer Availability:** Approved
- Created:** 06/28/2014
- Updated:** about 4 hours ago
- % Add Attachment:** Screen_Shot_2016-11-02_at_11:25:15_AM.jpg

Dashboard Statistics:

- Donations:** 441
- Volunteering:** 25
- Campaigns:** 10
- Interactions:** 10
- Events:** 10
- Households:** 10
- Development:** 10
- Wealth Screening:** 10
- Resources:** 10
- Largest:** \$70,000.00
- Average:** \$735.14
- Total:** \$311,697.91

Categories Supported:

- Arts & Culture
- Environment
- Education
- Health & Wellness
- Children
- Technology
- Animal Welfare
- Human Rights
- International
- Religion
- Science
- Social Justice
- Arts & Culture
- Environment
- Education
- Health & Wellness
- Children
- Technology
- Animal Welfare
- Human Rights
- International
- Religion
- Science
- Social Justice

Donations List:

ID	Date	Amount	Campaign / Category / Payment	Field / Account / Source / Group	Receipt	Created / Updated
4870	Feb 18, 2018	\$100.00	Monthly Bank Draft	71122 - Insurance (VIP Donors)		Feb 18, 2018 1 day ago
4870	Feb 16, 2018	\$100.00	Online Payment	2017 Capital Campaign		Feb 16, 2018 3 days ago
4872	Feb 16, 2018	\$1,000.00	Check	10111 - Savings Account (VIP Donors)		Feb 16, 2018 3 days ago
4856	Feb 13, 2018	\$1,000.00	Check	2017 Capital Campaign		Feb 13, 2018 6 days ago
4857	Feb 10, 2018	\$100.00	Check	10105 - Checking Account (VIP Donors)		Feb 13, 2018 6 days ago

LAYING THE FOUNDATION FOR CRM INTEGRATION

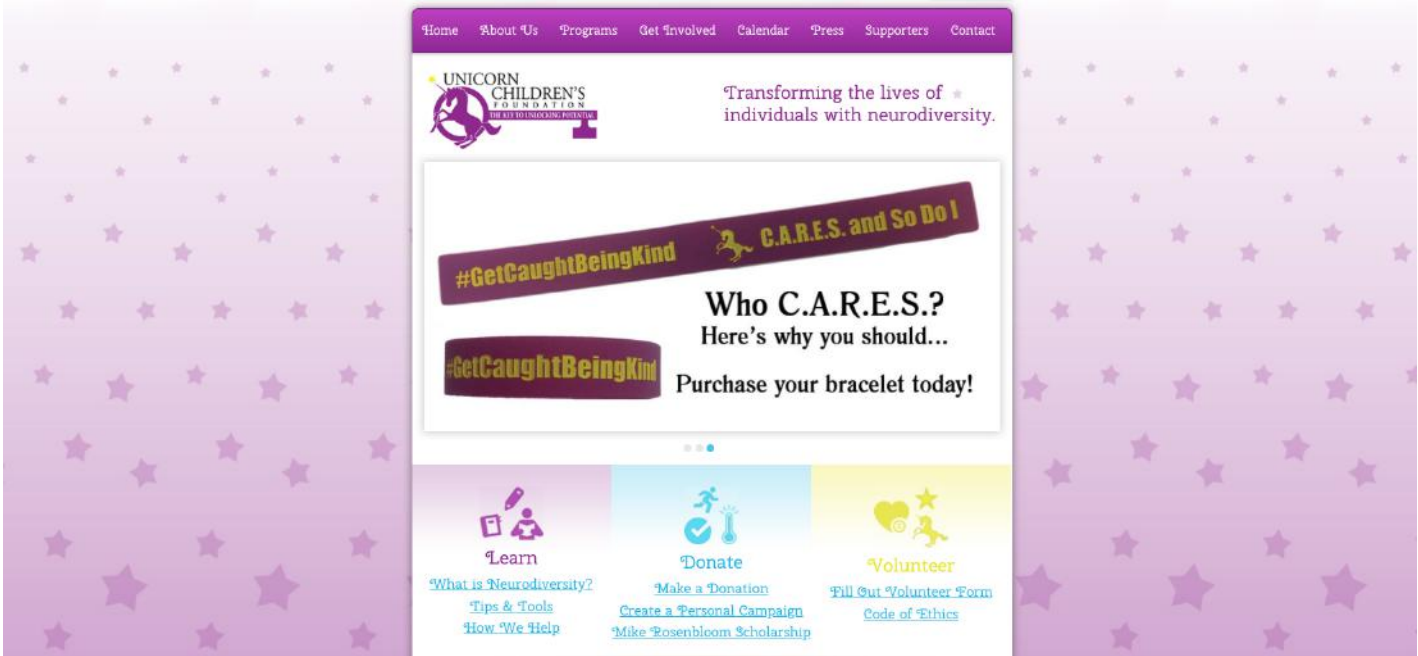
The first step for the Unicorn Children's Foundation to capturing meaningful data for enacting deeper engagement with constituents was website improvement and integration with the Giveeffect system. While this might seem like a daunting task, Giveeffect makes the process as simple as a few clicks of the mouse.

When creating Giveeffect's Web-in-a-Box solution, our engineers recognized that many nonprofits do not have a web designer on staff. For this reason, the web builder was explicitly designed to be easily accessible for non-technical users, as well as those with web development skills.

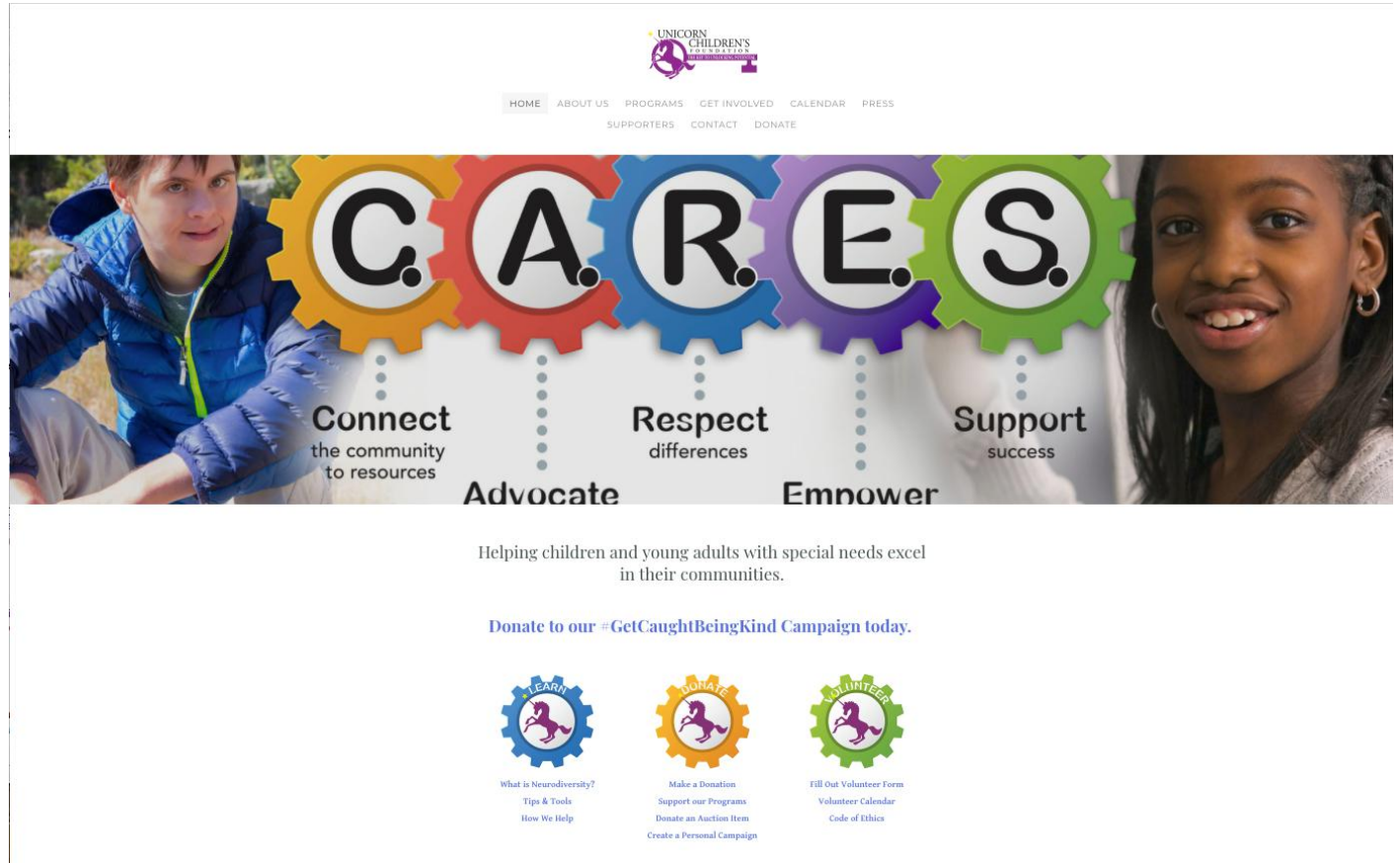
Using drag-and-drop technology, along with elements that can be customized with a simple click or toggle, the Web-in-a-Box solution helps organizations bring their designs to life. For Unicorn Children's Foundation, this resulted in an updated site with easy,

mobile-friendly navigation and a clean, fresh look that put the focus on the incredible work the organization was doing, as opposed to a cluttered home page.

Before Giveeffect Web-in-a-Box



Redesign after Giveeffect Implementation



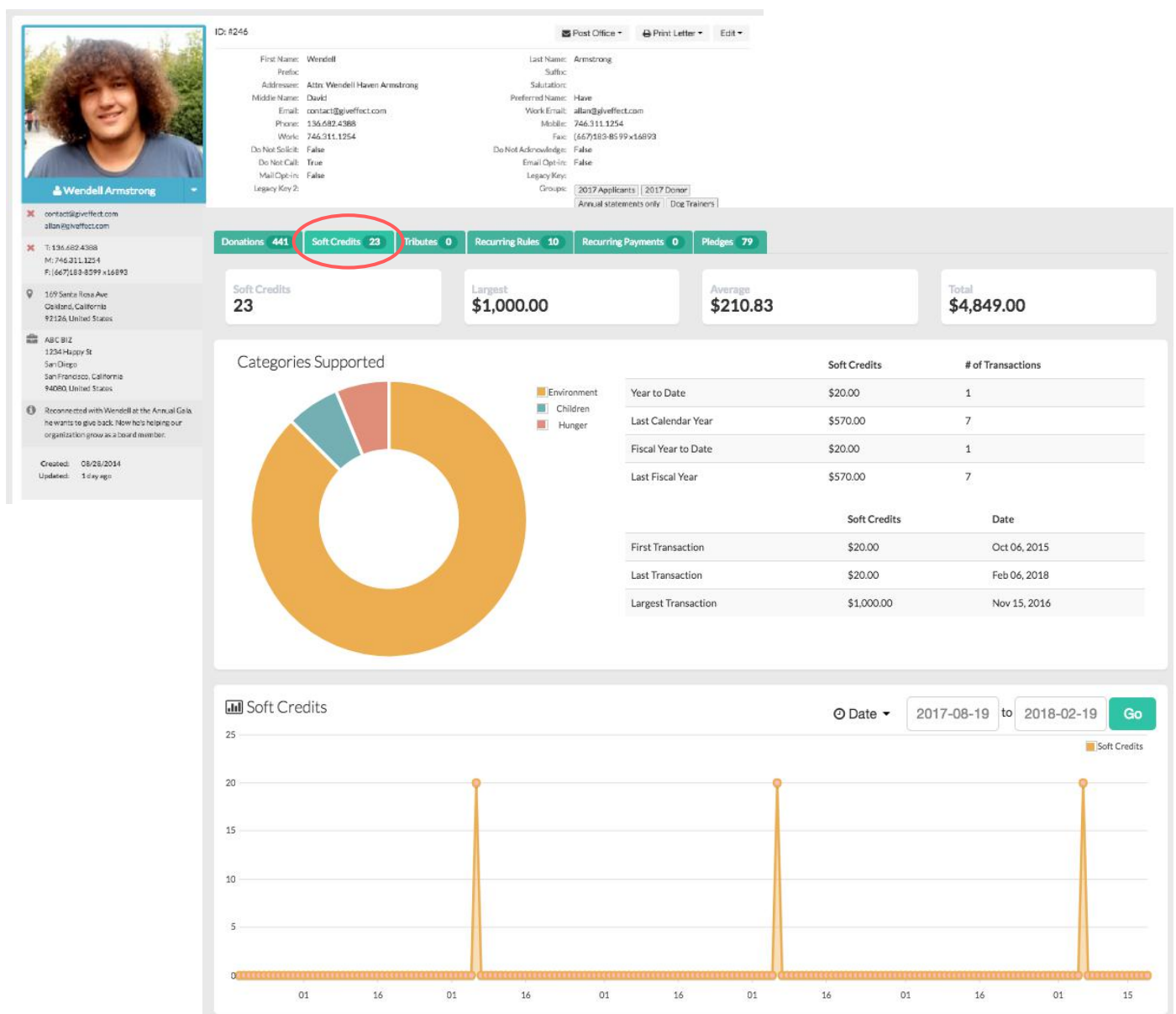
With a new site, the next step was to ensure that the proper links were in place to acquire visitor data. Unicorn Children's Foundation incorporated the links for donations, volunteer calendar and sign-up, campaigns and more—all by simply embedding links provided by Giveffect. In short, any time that a volunteer, donor or other supporter donated, signed up for a volunteer shift or even purchased a ticket to an event, this action was logged in his/her profile in the backend.

ENGAGEMENT STARTS FROM THE TOP DOWN

Like many nonprofits, Unicorn Children's Foundation is a small staff tasked with enacting big change, and a strong, involved board is essential for the Foundation's continued success. . However, a major pain point for Unicorn Children's Foundation was tracking the Board's progress, as well as giving them tools to achieve their objectives.

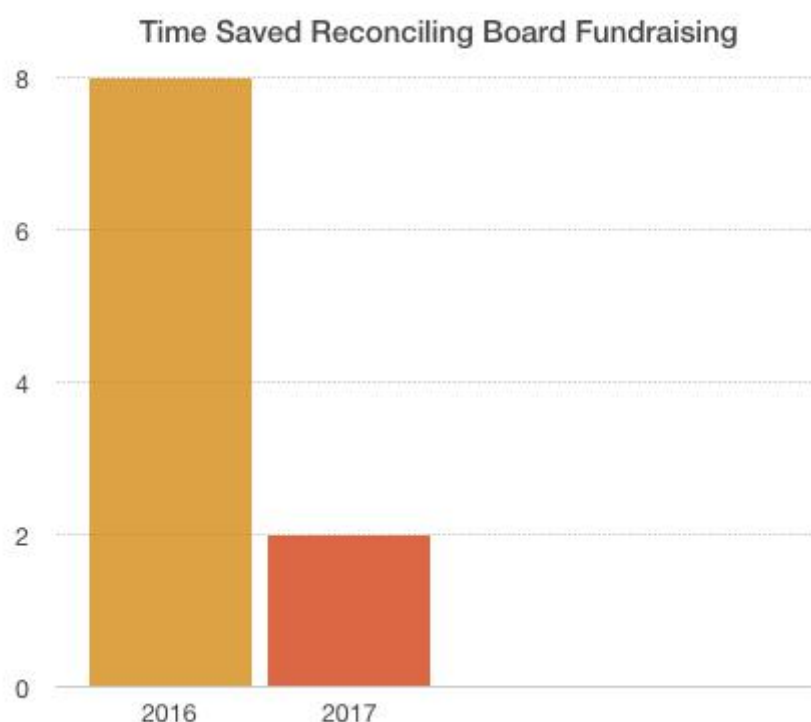
The Unicorn Children's Foundation Board operates on a Give or Get system, making it critical for donations to be reconciled in a timely manner to illustrate the board members' efforts. In the past, attributing donations, including soft credits, was tedious and time-

With Giveeffect, reviewing soft credits using the CRM is as simple as a couple of clicks. For example, a quick query yields a list of all of donors and the soft credits associated with them. By clicking on the supporter's name, users can access a wealth of information, including who the soft credit should be attributed to, how many soft credits have been made and the amounts. Moreover, the Giveeffect system provides data visualization so that key stakeholders, such as board members, can easily view the impact of their soft credits.



According to Alexander, her personal favorite feature for measuring board engagement is soft credits because, as she states, “in one simple step we can pull contacts for our Board and see the donation amounts they’ve brought in.” She further notes that this single report has reduced staff time spent on board donation reconciliation by at least 75%.

Ease of fund reconciliation is not limited to soft credits. For example, Unicorn Children’s Foundation receives a number of restricted funds. Like soft credits, reconciling campaign, honor and donor restricted funds was a relatively manual process, which occasionally involved calling donors to verify fund allocation. Using the CRM or the Campaigns tab (Giveeffect offers multiple ways to access data due to full integration), the process of reconciliation was significantly streamlined.

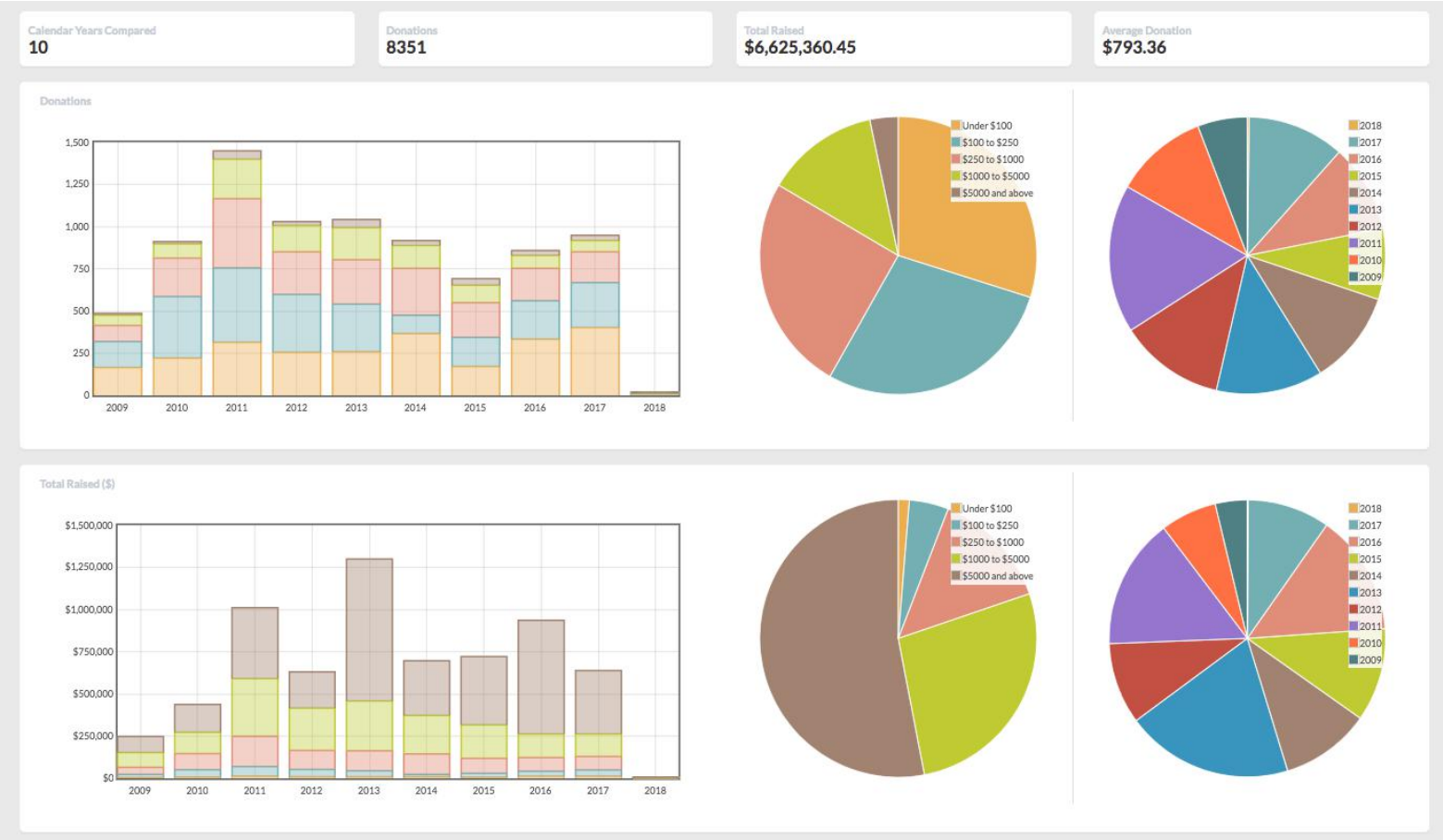


REPORTING FOR TARGETED ENGAGEMENT

Continuous engagement of donors is a top priority for most nonprofits. This was especially important for the Unicorn Children's Foundation staff and their Board. The organization's traditional plan of action involved calling hundreds of donors to gauge their interest in continued support of the organization. However, with Giveeffect, the Foundation was able to take a more strategic approach using the LYBUNT/SYBUNT Report, which gave them the ability to see donors who had given in the past but not this year, as well as the donation amounts.

This is made possible because during the onboarding process clients data is migrated to the Giveeffect system. This ensures a fully connected, 360-degree view of your data, not just from the moment you begin using Giveeffect prior years, as well.

From Growth reports to Annual Comparisons, Frequency Analyses and more, Giveeffect offers a wealth of baked in reporting features to put all of the data you've collected into meaningful, powerful reports that tell the story of your organization's efforts. This data migration made it possible for Unicorn Children's Foundation to target outreach efforts and identify qualified potential donors, rather than simply using a rolodex of numbers and contact information for outreach, with little context.



FOCUSED FUNDRAISING


Unicorn Children's Foundation also found success with the CRM and its integration with fundraising objectives. According to Communications Manager Amy Mann, the ease of creating campaigns, personal fundraising pages and peer-to-peer fundraising pages has resulted in a significant lift in participation.

For example, while using a different piece of software the previous year, one campaign attracted no participants. However, this year, Unicorn staff reports that they are seeing more overall donations, especially Honor Donations.

The Foundation reports that no different or additional marketing was done to promote the new campaign pages. Instead, they attribute the heightened interest to the simplicity of Giveffect's campaign design for both Unicorn Children's Foundation staff and the fundraisers who use the software.

For staff, a simple step-by-step guide walks them through the creation and launch of a campaign. More importantly, the back office data fields are being populated as the staff member designs the campaign. This simultaneous data integration has proven indispensable for the Unicorn Children's Foundation, who previously had trouble collecting even participant names for fundraisers. Giveeffect, consequently, provides a wealth of data based on the campaign or organizational needs. Best of all, the modern, easy-to-use design of the page provides both structure and flexibility for an end-result that's modern, customized and responsive. More importantly, no coding experience is necessary and the site can be fully functional on both the front and back-end in under 10 minutes.

Halloween Masquerade



**Eddie Dominguez ★ Gregory Fried
Kurtis Lutz ★ Derek Morrell ★ Max Tucci**

★ UNICORN CHILDREN'S FOUNDATION
THE KEY TO UNLOCKING POTENTIAL

★ ALONG WITH
Chairman: Max Tucci

PRESENT A HALLOWEEN MASQUERADE
"DRAG OUT AWARENESS"

SUNDAY, OCTOBER 29TH, 2017
6:30PM - 10PM
DINNER & A DRAG SHOW AT LIPS

VIP: \$150 Regular: \$100

Purchase Tickets / Vote:
561-620-9377 x 302
UnicornChildrensFoundation.org/LIPS

Vote for Your Favorite Diva
\$10 Donation = 1 Vote

Prize for Your Best Costume!

The Ultimate in "Drag Dining"
1421 East Oakland Park Blvd, Oakland Park, FL 33334

Share Like Embed

78 supporters

\$20,722 raised of \$70,000 goal

29%

DONATE

\$150 fee (Sold Out) VIP Ticket includes photo op with Chairs & Divas, VIP seating, 2 drinks, dinner & show

\$100 fee (Sold Out) Regular Ticket includes 2 drinks, dinner and show

\$10 fee Vote for Gregory Fried

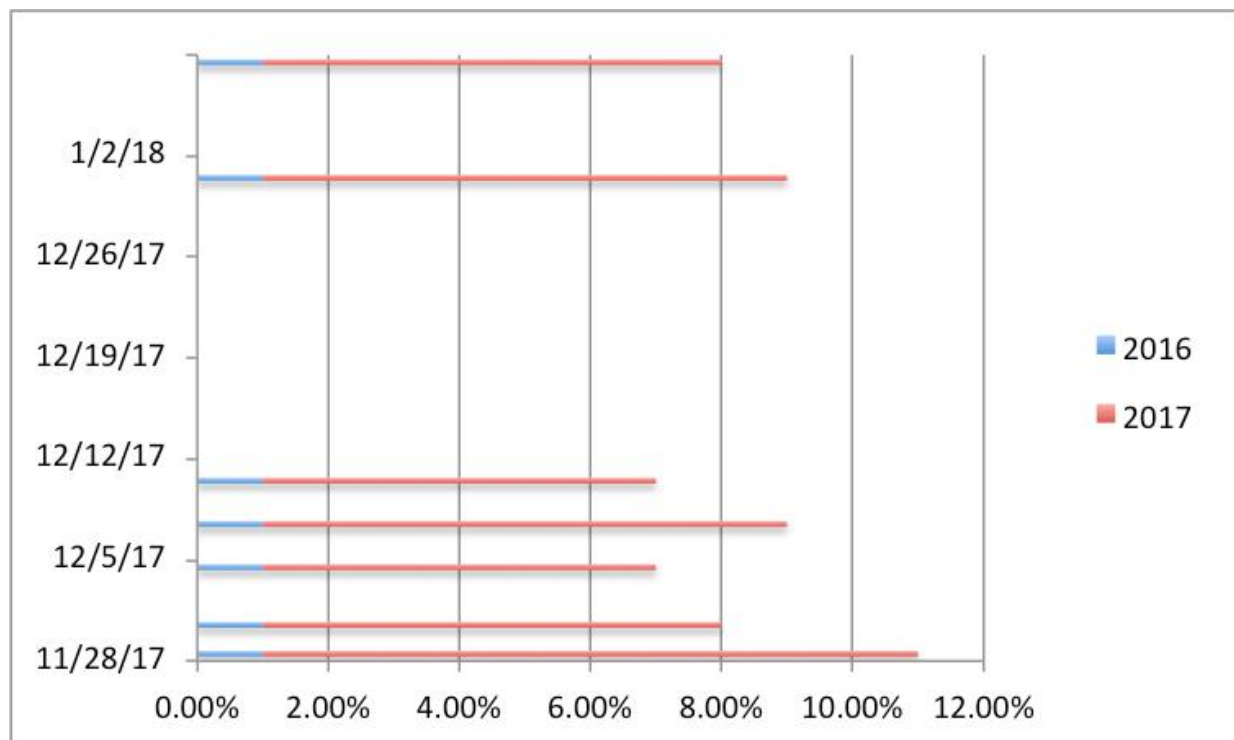
\$10 fee Vote for Max Tucci

\$10 fee Vote for Derek Morrell

\$10 fee Vote for Eddie Dominguez

ENGAGING THE EMAIL INBOX

In a time inundated with communication channels—from social media to traditional mail, online advertising, billboards, print campaigns, sponsored stories and more—email remains one of the most effective channels for reaching customers. However, as information consumption changes, it is more important than ever for nonprofits to stay on top of these changes and trends. Unicorn Children’s Foundation found this was the case with mobile email consumption.



Email Open Rates 2017 v. 2016

Unicorn Foundation Newsletter Sample

Unsubscribe

UNICORN CHILDREN'S FOUNDATION

February News



Welcome Our New Treasurer,
Adam Ziffer, CPA

Unicorn Children's Foundation, a leader in the field of special needs and neurodiversity, has announced its new Treasurer, Adam Ziffer, CPA after serving as a board of director for three years. He has recently opened his new firm, Adam C. Ziffer, PA, and has been a practicing Certified Public Accountant in the South Florida area for over 20 years. Adam is eager to contribute his expertise that will help the organization expand its impact and ensure that children and young adults with special needs excel in their communities.

Book of the Month





Children with Autism Spectrum Disorder (ASD) are all very unique and have an extremely wide range of functional levels. Characters in this book are two wonderful children who become friends in their inclusive early childhood classroom. The stories are told through the perspectives of Ruthie, a young girl who is developing typically and through Clay, a Hispanic boy with autism. This book was written by our Vice-President, Melissa K. Burkhardt, M.S.Ed., BCBA.

Winner of 2013 Mom's Choice Awards and the 2015 Autism Society's Temple Grandin Literary Work of the Year

100% of all proceeds will directly benefit Unicorn Children's Foundation

Buy Now

where you will receive the education and tools needed to be confident and successful in providing respite care to adults and children.

TRAINING OPPORTUNITY!

Upcoming REST Companion Training Location

Saturday, March 24, 2018 ♦ 9am - 5pm

Registration Fee: \$10 (Refunded Upon Attendance)

Boca Raton Children's Museum
498 Crawford Blvd.
Boca Raton, FL 33432

For Information, Contact
561-620-9377 x 306 ♦ ivonne@eunicorn.org



UnicornChildrensFoundation.org/Companion

RSVP

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EMED

GRANTE

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February 14,

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Buy Tickets

The Unicorn Ball

"Disco & Diamonds"

Sunday, March 4, 2018

5pm - 11pm

Boca West Country Club -

Boca Raton

Co-Chairs: Gregory Fried & Kurtis Lutz

Buy Tickets

BOCA WEST CHILDREN'S FOUNDATION



GREAT GIVE 4/24

A Battle for the Kids Foundation Days

\$200,000 Golf Challenge

Monday, April 9, 2018

11am

Boca West Country Club

The Battle of the Bands: Chicago vs. Billy Joel

Tuesday, April 10, 2018

6pm

Boca West Country Club

Great Lawn

Buy Tickets

Springtime in Paris Dinner

Thursday, April 12, 2018

6pm - 11pm

Indian Creek Country Club -

Miami Beach

Chair: Gwen Taylor

*Ultra exclusive country club!

Buy Tickets

The Great Give

Tuesday April 24, 2018

Midnight - Midnight

Online

More Info

Unicorn Children's Foundation
21100 Ruth & Aaron Coleman Blvd.,
Suite 250
Boca Raton, Florida 33428
Phone: 561-620-9377
Fax: 561-620-9376



In addition to ease of email creation, Giveeffect's CRM offerings provide users with a simple approach to email specific lists without the necessity of combing through lists and manually deciding which constituents should receive an email. Smart Automation and data mapping allow groups of constituents to be identified. In just a few clicks, users can pull a list and email it with the Email this List feature. Using the "Email this List" function in the CRM, the Unicorn Children's Foundation staff was able to reach out to specific volunteers when opportunities were available.

For even more personalized email communication, the Foundation implemented a simple transactional email rule to send personalized thank you emails to deliver to donors after a donation. Both of these email engagement techniques help the Unicorn Children's Foundation to keep constituents informed and engaged.

CONCLUSION

With Giveeffect's fully integrated software solution, the staff at Unicorn Children's Foundation were empowered to pull meaningful data, create strategic communications, work more efficiently and spend more time focusing on the mission. As Alexander states, "We are thrilled with Giveeffect."

