



**Integrated Tracking and Reporting Database Software  
specifically for Foundations, Local Government Community Giving,  
smaller Charities and Schools**

*"Foundation Manager™ helps keep all the data I need in one place  
... for supporters and beneficiaries"*

*"This software helps me identify my different supporter groups so I can  
personalise all my correspondence"*

*"Foundation Manager™ quickly analyses the data so I can easily  
report trends to my Board"*

*"It's secure, easy to use and fun to work with ... a perfect combination"*

***"Foundation Manager™ is an essential administration asset"***

### **Background:**

Foundation Manager™ was initially created to fill a large gap in the South Australian Foundation market. Due to its design flexibility, it now also proves to be ideal for Local Government community funding, smaller charities and schools.

Corporate Heart's research in South Australia reveals that most of these organisations are collecting data by either using a makeshift database they have adapted themselves, an Excel spreadsheet or manual record cards. Most had investigated database software but were not prepared to pay the exorbitant prices for overseas based software being resold from Sydney & Melbourne, with bells and whistles and a price tag to match.

**With growing number of these community focussed organisations all essentially requiring the same thing ... reliability, accountability and cost effectiveness ...**

**Foundation Manager™ was created and has evolved.**



### **Features:**

- Records all Beneficiary information
- Records and segments all Supporter information
- Captures all data required by the Australian Tax Office
- Complies with Privacy Act legislation information collection
- Records: communication history, financial transactions, pledges, reminder notes, personalised information, monetary and gift in kind donations and personalised supporter 'attributes'.
- Transfers data to Excel for mail merges
- Is multi-user friendly, with individual password security
- Includes a reminder system
- Links campaigns or events to supporters or beneficiaries
- Has a postcode interface
- Has a search function that creates specific reports & mailing lists
- Mailing preferences including bulk, individual and email options
- Segments relationship and mailing attributes for supporters
- Is a Microsoft Access based program, that works on 'run time'
- Provides reports for administration support and fund analysis

### **Benefits:**

- Cost effective by minimising administration and reporting time
- Specifically tailor made for Australian small to medium sized, community focussed funding or charitable organisations
- Fast attribute or segment mailing
- Secure and 'Privacy Act' regulation compliant
- Easy to use and add new categories
- Support is only a telephone call away
  
- ***Management can be shown at any given time a macro and micro synopsis of where their funds have been distributed and their support base.***



**System Requirements:**

Microsoft XP (Minimum requirement)  
300 MHz or higher Intel Pentium or compatible CPU  
156 MB RAM  
17 MB hard disk space  
Microsoft Office

*If you would like any further information, ask about our pricing option details or organise for a demonstration, please contact us ...*

***Foundation Manager™ could well be one of the best administration investments your organisation will ever make.***

**Contact:**

Lisa Botten  
0412 293 094

or

Angelo Fantasia  
0408 200 923



**CORPORATE HEART**

**Corporate Heart Pty Ltd  
PO Box 200  
Marden SA 5070  
Ph: 08 8165 1546  
Email: [lisa@corporateheart.com.au](mailto:lisa@corporateheart.com.au)**

**[www.corporateheart.com.au](http://www.corporateheart.com.au)**