

North Texas Area United Way



Andar/360 Proposal

PROPOSED BY ANDAR SOFTWARE

Founded more than 40 years ago, the story of Andar Software began when two individuals came together to develop Andar/360, a solution made specifically for the multi-faceted nonprofit organization. Since then, Andar/360 has processed nearly five billion dollars of donations and serves 400 nonprofit customers.

At Andar Software, we know that your organization is unique, that you often must do more with less, and that your passion lies in making a difference.

What you can expect

Andar Software is eager to partner with you for your customer relationship management (CRM) software, training, professional services, and cloud hosting needs. Andar Software was built by United Ways for United Ways and has more than 400 United Way customers across North America.

What you'll get with Andar Software

- **A CRM that considers organization-wide perspectives and offers usability to every function within your organization**
- **A solutions-oriented team of professionals with you as our customer at the center**
- **A donation processing machine, capable of getting millions of dollars into local communities across North America**
- **A partner with a growth mindset, continuously adapting to new trends and changing customer needs**
- **A community of people focused on working together committed to making a lasting difference in society**

What you'll love about Andar/360

You'll be able to process millions of dollars in donations, analyze data for strategic decision making, build long-term donor relationships and sync to your other systems and software with a robust and powerful CRM.



About the Proposal

The following proposal will provide you with:

- 1. The Investment***
- 2. Our team as your partners***
- 3. Andar Software***
- 4. Andar Hosting***

The Investment: Licenses

Andar Software is committed to offering competitive pricing that considers limitations on administrative funding within the charitable sector.

Licenses	Description	Initial Investment	Annual Investment
Andar/360 Licenses	<i>Customer relationship management database allowing for simultaneous use by 3 people (can be scaled based on number of users)</i>	\$ 4,850.00	\$ 1,455.00
Major Individual Gift	<i>Cultivate large investments with moves management, workflows, wealth profiles and giving trend analysis</i>	Included	
Marketing Integration	<i>Tie your most critical information together by connecting your CRM and Inbound/Outbound Marketing Engine together resulting in world-class analytics and information sharing</i>	\$ 2,500.00	\$ 750.00
ePledge	<i>Allows for online pledging with customizable webpages for both individual donors and workplace campaigns</i>	\$ 5,000.00	N/A
Total license and annual costs		\$ 12,350.00*	\$ 2,205.00

The Investment: Training

Proper user training is essential for the successful implementation and operation of Andar/360. Training on the deployment, implementation, and use of Andar/360 can range from 4 half-day sessions up to several days. Adopting any new donor management system will change many processes internally and externally for your organization. A customized menu of training offerings will be curated to your organization’s specific needs. Our implementation team is happy to work with and plan out a recommend amount of time and budget.

The Investment: Conversion

Conversion	Description	One-time Investment
Conversion	Conversion of a specific number of years of data, designations, account information, campaign, and donor choice structure from the legacy software	\$ TBD

**This proposal and the fees quoted herein are valid for 120 days from the date on the cover of this proposal. This proposal is presented in good faith and reflects our understanding of NTAUW’s requirements. No contractual obligation can be inferred from this proposal depending on final requirements and business process review with NTAUW.*

Our Team and Your Partners

We thank you for considering our team to be your partners!



Harry Veening, General Manager

Harry's leadership and strategic vision for Andar mean we will continue to innovate and enhance Andar/360, our modules and API's, professional services, and hosting. Harry brings extensive knowledge and experience in the nonprofit industry to our leading integrated software platform - Andar/360.

Harry.Veening@AndarSoftware.com

877-479-3780 x 302



Eric Crammond, Director of Business Development

Eric's background in social work and career in direct service and strategic planning has positioned him for understanding your organization's priorities and needs from a nonprofit technology perspective.

Eric.Crammond@AndarSoftware.com

877-479-3780 x 319



Mallory Denomy, Sales Manager

Mallory is a passionate and experienced fundraising professional with roots in direct social service work. She takes a strategic and holistic approach to the use of your nonprofit CRM - all with the goal of helping people in your organization and the broader community.

Mallory.Denomy@AndarSoftware.com

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Andar Software

Andar Software's History and Commitment

With Andar Software, you can easily meet your fundraising objectives, maintain important relationships, manage your website and marketing communications, track event progress and success, recruit volunteers, and so much more. Andar is partnered with more than 400 organizations across North America - each being unique, doing less with more and making a difference in their niche within the nonprofit sector. Andar Software is proud to have been involved in getting nearly five billion, yes billion, into local communities over the last 40+ years.

Andar Software is a part of Volaris Group, an operating group of Constellation Software Inc. (CSI). Volaris Group provides specialized, mission-critical enterprise software solutions to a variety of vertical markets across the world. Constellation Software Inc. (CSI) is an international provider of market leading software and services to several industries in both the public and private sectors - publicly traded on the Toronto Stock Exchange (TSX).

Maybe you're thinking, what does this mean for Andar? Well, it means we are uniquely positioned for success and held to the highest standards and best practices because of the Volaris Group's resources and expertise and Constellation Software's oversight and strategic guidance. With resource sharing and stability, Andar Software will forever be a leading nonprofit CRM provider. If these big fish believe in and invest in us, we think you should too!

Andar Hosting

Your fundraising and campaign success relies on the availability, speed, and performance of your applications, and the environment that you run them in must be reliable and secure.

What you'll get with Andar Hosting

- ***Cost effective and competitively priced solution to outsource your information technology resources***
- ***Smooth transition to hosting with a dedicated project manager***
- ***Ease of use with timely updates to your applications and access through a secure internet browser or smart-client application***
- ***Peace of mind knowing your data is secure***
- ***Endless possibilities with additional support such as web-server management and campaign and pledge processing***
- ***Help when you need it with Andar's Helpdesk assistance accessed by telephone, email, or online***

What you'll love about Andar Hosting

You'll feel confident knowing that Andar Software's Hosting environment offers the highest level of physical and information technology security - exceeding industry security standards and achieving numerous security certifications. See appendix for Andar Hosting Security Standards.



Andar Hosting and Services

Hosting - Servers, Data and Applications

Servers, applications, and data are hosted in certified data centers in Canada and the United States. All updates and upgrades the hosted applications including Andar/360 are managed by Andar.

Back-up Disaster and Recovery

Monitoring, back and disaster recovery is all accounted for. In the event of a disaster in one data center, customers access remains available in the other in the respective country.

Training

One-to-one training is provided through live desktop sharing, webinars, videos, and quick reference guides.

Helpdesk Support

Different service levels of help desk are available depending on any given scenario and the customer needs.