



NETWORK
of Jewish Human
Service Agencies

VISION

NJHSA
Annual Conference

2020

CONVENE. CONNECT. COLLABORATE.

**Vision 2020: Return on Mission: Leveraging Technology for
Visibility, Insight, & Investment**

Sponsored by **sage** Intacct

Return on Mission

Leveraging Technology for Visibility, Insight, and Investment

Joan Benson

Director, Nonprofit Industry Marketing, Sage Intacct

Jane Dennis

Sr Solutions Consultant, Sage Intacct






When Mission is the Beneficiary, Metrics Matter



Data & Metrics Make it Powerful

charity: water [DONATE](#)



Our Progress

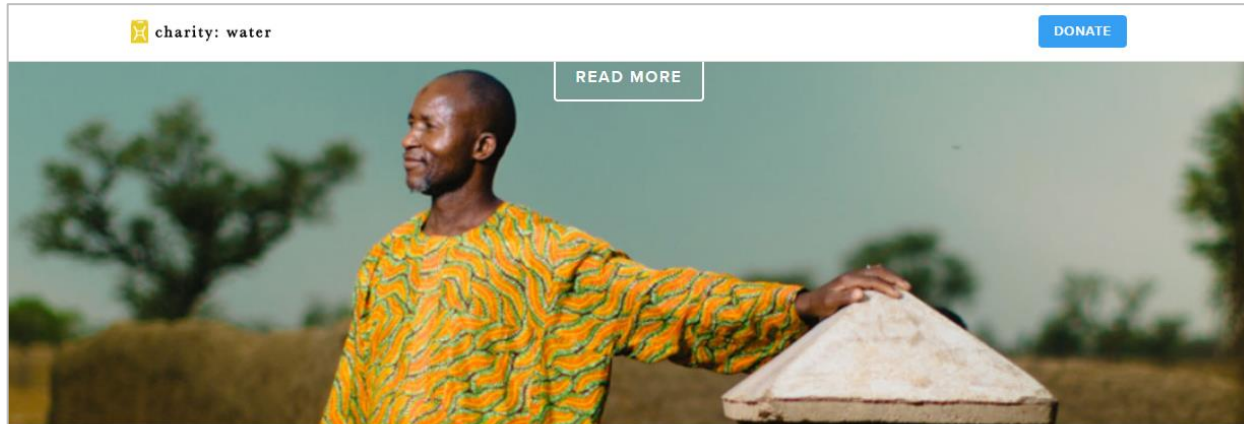
We're passionate about solving the water crisis in our lifetime, using 100% of all public donations to fund water projects, and proving where every dollar goes with photos and GPS coordinates. Here's the progress we've made since we started working in 2006.

44,007 Water projects funded	10,043,704 People will get clean water	37 Local partners	27 Countries
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[SEE OUR COMPLETED PROJECTS](#)





Transparency Matters

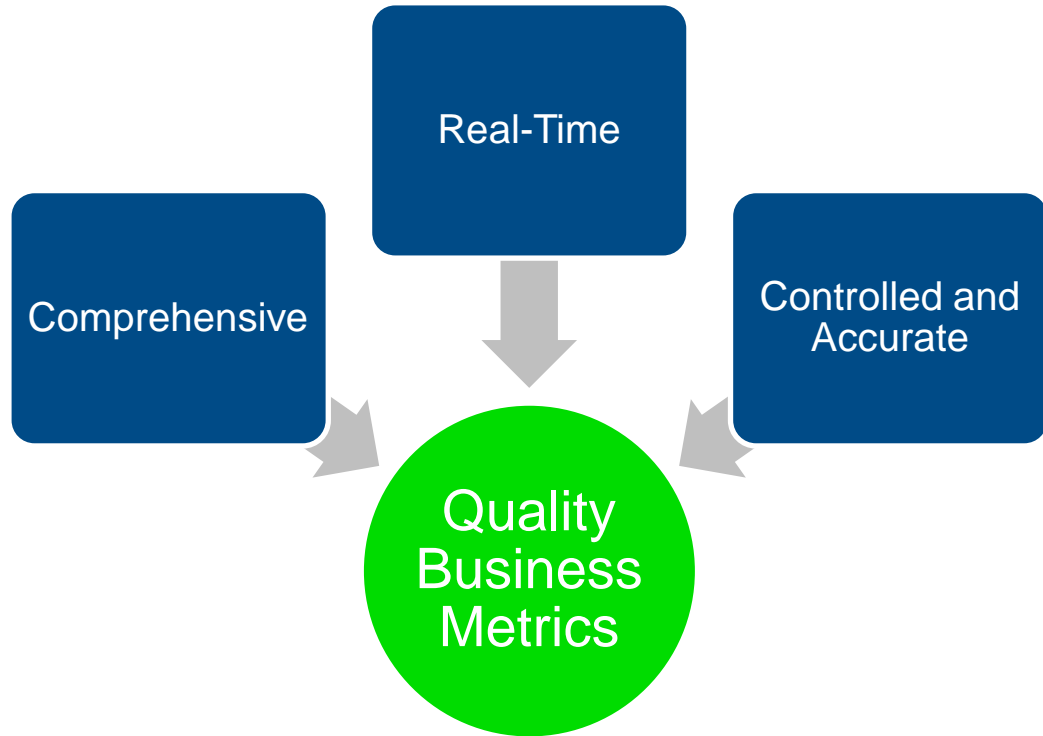


charity: water [DONATE](#) [READ MORE](#)


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](#)



The key to strategic reporting is access to real-time information instead of backward-looking data.

It is really all about getting quicker insight to help ensure mission success.



DIGITAL TRANSFORMATION

Visibility that Transforms—in Real Time

sage Intacct

sage Intacct Community Health Top level ▾ Beta UI On Send Us Feedback Karla Grace 🔍 🔖 🔔 ?

HOME DASHBOARDS REPORTS COMPANY GENERAL LEDGER PURCHASING ACCOUNTS PAYABLE ORDER ENTRY ACCOUNTS RECEIVABLE GRANTS CASH MANAGEMENT TIME & EXPENSES INVENTORY CONTROL PLATFORM SERVICES FIXED ASSETS ALLOCATION MANAGEMENT

Outcomes ▾ Sample NFP Metrics ▾ 12/31/15 Clear + + + +

Total Program Expense

\$4,572,658 ↑

this year +5144.10% vs. prior year

of Meals Served

226,537 👍

this year +4.35% vs. prior year

Volunteer Hours

13,241 🚩

this year +54.25% vs. prior year

Expense per Meal

\$20.19 😊

this year -1.03% vs. prior year

Program Exp per Member Cost 02/14/15 06:14 🔍 🔖 🔔 🔗

	Services Year Ending 12/31/15 Departments	Task Forces Year Ending 12/31/15 Departments	Program Services Special Projects Year Ending 12/31/15 Departments	Safe Communities Year Ending 12/31/15 Departments	All Departments Year Ending 12/31/15 Departments	Year Ending 12/31/15 Actual	Year Ending 12/31/15 Actual
Expenditures							
Personal Expenses	730,038.02	354,011.15		85,128.08	80,820.08	1,230,297.33	
Professional Fees	834,126.89	251,996.32		228,823.57	138,964.38	1,260,710.16	
Program Expenses	119,008.03	79,851.24		154,394.05	85,020.01	418,143.33	
Occupancy	135,794.55	177,406.28		48,256.91	92,256.77	443,714.51	
General and Administrative Expenses	438,480.88	237,263.72		331,615.85	222,414.01	1,228,763.24	
Total Expenditures	2,658,337.45	1,106,137.71		844,988.16	569,175.25	4,572,656.57	
Members	7,626.00	1,142.00		316.00		9,182.00	
Cost per Member	273.53	953.38		2,674.01	2,800.18	498.00	

Aggregate R&E by Site 02/14/15 06:14 🔍 🔖 🔔 🔗

Site Group	Revenue		Expenditures		# of Families	# Families
	Year To Date	Year Ending	Year To Date	Year Ending		
	12/31/15	12/31/15	12/31/15	12/31/15	12/31/15	12/31/15
Main	5,235,857.83	4,101,254.45	1,134,803.08	888.00		
Vance	950,953.87	808,684.48	393,071.39	132.00		
Smithwick	801,677.39	1,048,754.65	(244,807.20)	300.00		
Reedville	2,238,258.92	835,959.10	1,407,739.52	178.00		
Total Site Group	9,236,190.79	6,545,303.38	2,940,506.41	1,472.00		

Volunteers per Program 02/14/15 06:14 🔍 🔖 🔔 🔗

Special Projects - 1,392.00

Show Data

Meals per Site 02/14/15 06:14 🔍 🔖 🔔 🔗

Statement of Revenues & Expenditures - Grants Comparison 02/14/15 06:14 🔍 🔖 🔔 🔗

	Holcombe Grant Year Ending 12/31/15	Consortium Conference Year Ending 12/31/15	Grants Health Initiative - 1 Grant Year Ending 12/31/15	Rural
Revenues & Expenditures				
Operating Revenue				
Grant	0.00	0.00	128,750.00	
Total Operating Revenue	0.00	0.00	128,750.00	
Expenditures				
Program Expenses	0.00	0.00	26,000.00	
General and Administrative Expenses				
Office Supplies	564.00	130.00	4,838.00	
Travel Expenses	0.00	0.00	1,780.00	

Statement of Revenues & Expenditures - Program Comparison 02/14/15 06:14 🔍 🔖 🔔 🔗

	Services Year Ending 12/31/15	Task Forces Year Ending 12/31/15	Departments Special Projects Year Ending 12/31/15	Safe Communities Year Ending 12/31/15	All Deps Year 1
Operating Revenue					
Grant	138,750.00	0.00	0.00	0.00	138
Contributions	13,976.00	10,000.00	0.00	0.00	21
Program Cost	0.00	1,710,004.00	0.00	0.00	1,711
Membership Dues	520.84	0.00	0.00	0.00	
Sales	45.00	0.00	1,277,176.71	0.00	1,277
Service/Participant Fees	510,670.28	347,328.95	800,220.03	427,810.59	1,751
Other Revenue	440,474.00	171,343.80	191,813.11	222,750.31	1,002
Total Operating Revenue	1,705,439.21	2,238,707.39	1,645,209.90	650,560.91	5,941

Statement of Revenues & Expenditures - Location Comparison 02/14/15 06:14 🔍 🔖 🔔 🔗

	Main Year Ending 12/31/15	Vance Year Ending 12/31/15	Site Group Smithwick Year Ending 12/31/15	Reedville Year Ending 12/31/15	All Site Year Ending 12/31/15
Revenues & Expenditures					
Operating Revenue					
Grant	138,750.00	0.00	0.00	0.00	138,750.00
Contributions	1,784,803.25	0.00	0.00	0.00	1,784,803.25
Program Cost	541,969.77	300,405.00	283,304.00	200,100.00	1,724,678.77
Membership Dues	212,013.19	0.00	0.00	0.00	212,013.19
Sales	45.00	0.00	0.00	1,923,993.57	1,923,938.57
Service/Participant Fees	0.00	0.00	0.00	(648,717.80)	(648,717.80)
Other Revenue	0.00	0.00	0.00	0.00	0.00

Going Beyond GAAP Reporting

Company Type: Sales demo

sage Intacct Sample Nonprofit Organization Top level

Beta UI Send Us Feedback Karla Grace

HOME DASHBOARDS REPORTS COMPANY GENERAL LEDGER ACCOUNTS RECEIVABLE ACCOUNTS PAYABLE PURCHASING TIME & EXPENSES ACTIVITIES AND GRANTS CASH MANAGEMENT INVENTORY CONTROL ORDER ENTRY

Outcomes Sample Clinic Metrics 12/31/14 Clear + ⚙ 📄 🖨

Real-Time Outcome Metrics

# Patients Served 4,009 this year +70% vs. budget	# Encounters 217,040 this year +8.85% vs. prior year	# of Clinicians 85 this year +4 vs. prior year	Revenue per Clinician \$89,802 this year
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Aggregate R&E by Clinic Location
11/06/14 23:59

Site Group	Revenue Year To Date 11/05/14 Revenues	Expenditures Year To Date 11/05/14 Expenses	Surplus or Loss	Clinicians Year Ending 12/31/14 # of Clinicians
Main	3,486,001.83	3,116,521.69	369,380.04	44.00
Smithwick	619,090.28	439,990.99	179,099.29	17.00
Vance	413,752.01	836,911.38	(423,159.37)	17.00
Readville	1,653,451.79	860,465.32	902,986.47	7.00
Total Site Group	6,052,095.71	5,042,888.98	909,176.73	85.00

Patients per Practice Area
02/21/18 08:14

Practice Area	Patients
Transitional Jobs	~1800
Vocational Services	~450
Training Services	~1300
Advocacy	~200

Aggregate R&E by Practice Area Comparison
02/21/18 08:14

Program Services	Revenue Year To Date 12/31/14 Revenues	Expenditures Year To Date 12/31/14 Expenses	Surplus or Loss	Clinicians Year Ending 12/31/14 # of Clinicians
Transitional Jobs	2,798,065.10	2,008,995.12	767,069.98	56.00
Vocational Services	2,398,318.41	1,071,359.32	1,294,959.09	13.00
Training Services	1,872,095.58	792,098.85	1,079,996.73	13.00
Advocacy	628,729.32	649,274.16	(79,456.16)	4.00
Total Program Services	7,693,208.41	4,422,325.45	3,210,882.96	85.00

Encounters per Site
02/21/18 08:14

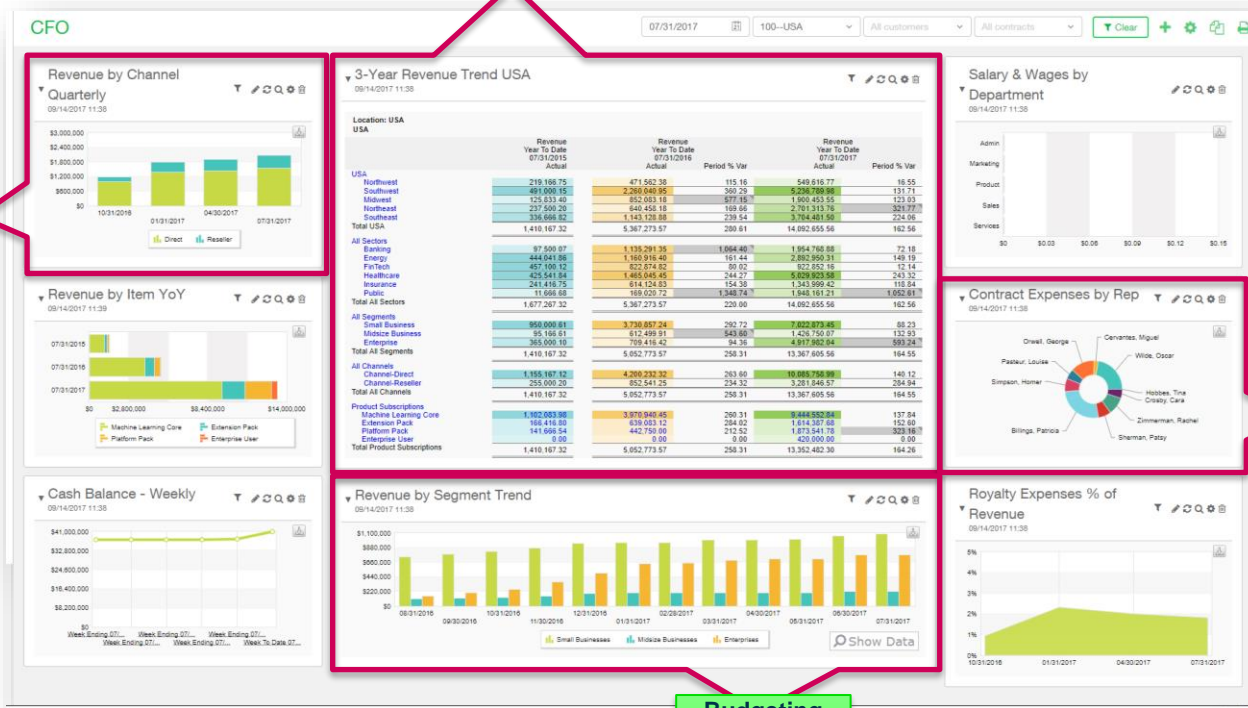
Site	Encounters
Main	~60%
Readville Ctr	~20%
Vance	~20%

Sage Intacct Cloud Platform

The Power of Integrating Best-in-Class Apps

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Budgeting & Planning



Most Donors Research Orgs Before Giving

Prior to making contributions, donors consider the following factors:

TOPIC	% OF DONORS WHO RESEARCH BEFORE GIVING
Overall Efficiency	70%
Philanthropic Impact	59%
General Reputation	54%
Operating Costs	53%
Mission and Services	53%
Executive Salaries	43%
Funding Sources	31%

INSTITUTIONAL SPENDING REMAINS A PRIORITY



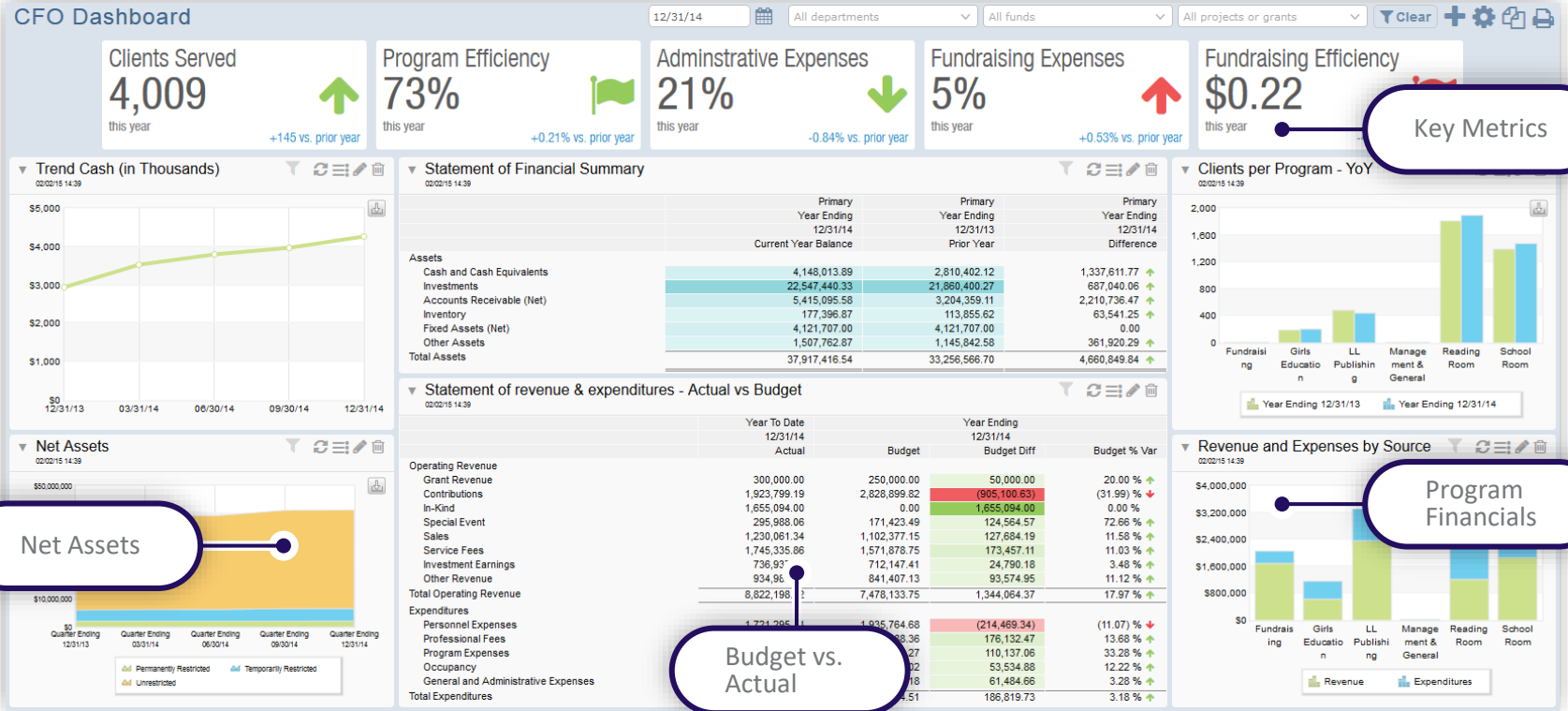
76% are concerned about how much money goes to an organization's overhead



56% research how an organization spends its funds

A Guide to Philanthropy in the U.S., 8th Edition, 2019, CCS Fundraising

Bringing the Data Together





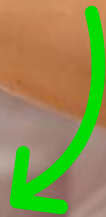
Room to Read
Improved
productivity by
25% worldwide

Transformed the
lives of an
additional
100,000 children



**Community Foodbank
of Eastern Oklahoma
Improved cash flow
by \$25,000**

**Served an
additional 75,000
meals**



UWCI Increases Impact on Community

CHALLENGES BEFORE

- USL Financials lacked digital audit trail; required paper back-up copies
- Limited reporting capabilities hindered productivity
- Forced department to be reactive, not proactive
- Numerous manual processes

GAINS WITH SAGE INTACCT

- Accelerated community impact due to visibility
- Added valuable detail to grantor & gov't reports
- Improved organization-wide accountability
- Improved team morale

United Way



United Way
of Central Indiana

25% Increase

Finance team efficiency

400% Faster

Monthly report preparation

“Our finance team is no longer just task-oriented; we’re much more forward-thinking, which is wonderful. As a result, collaboration across the organization has increased tenfold. Everyone from our community impact department, to fundraising, to the volunteer center, is coming to us to ask questions and plan for the future of the UWCI.”

Lynn Auffart, Senior Director of Finance

Helping Diverse Nonprofits Maximize ROM

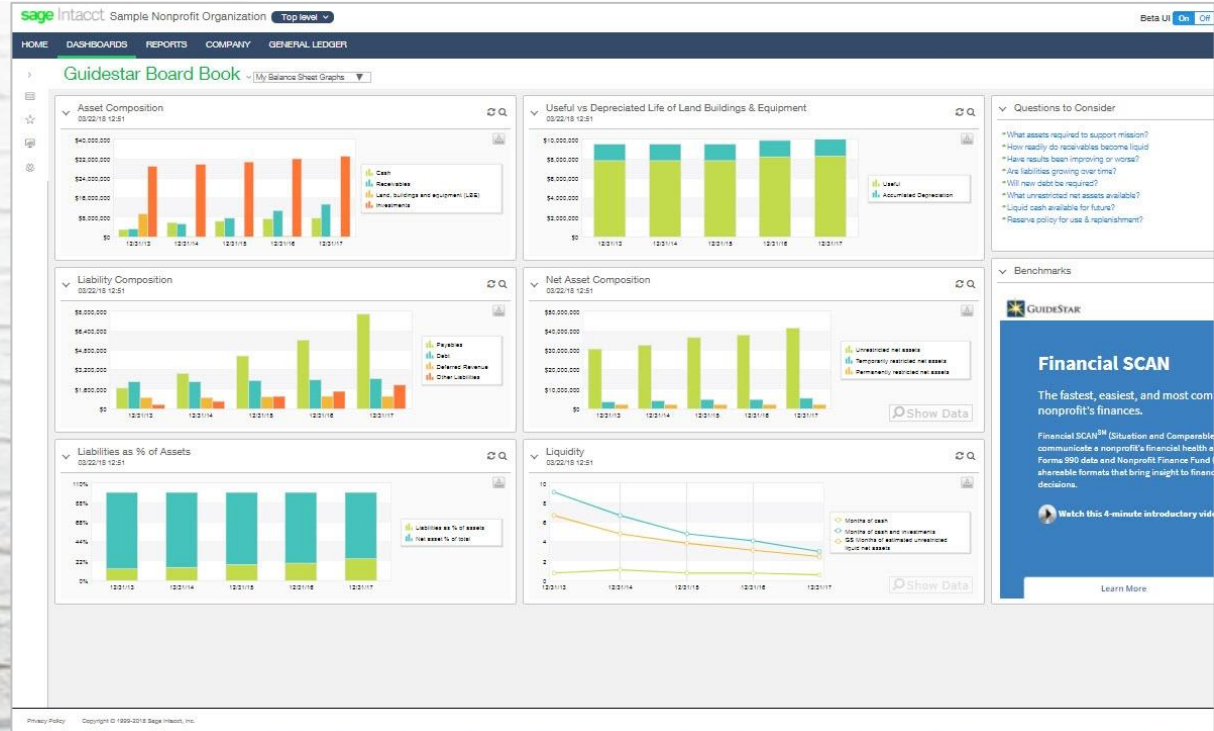
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13,000+ Total Customers

Over 32% Are Nonprofits



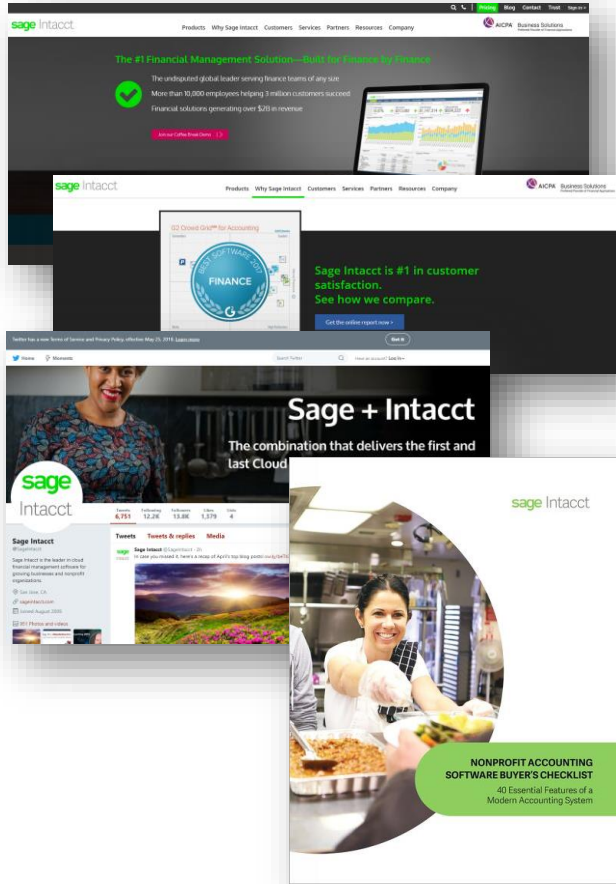
What Secrets Are Hiding in Your Data?



Questions?

Interested in Learning More?

- [2020 Nonprofit Technology Trends Research Report](#)
- [Try Sage Intacct with a Free 30-Day Trial](#)
- [Watch the Sage Intacct for Nonprofits Product Tour Video](#)
- [Attend an Upcoming Webinar](#)
- [Download our Nonprofit Accounting Software Buyer's Checklist](#)
- Download our eBook: [Nonprofit Storytelling – Using Data and Performance Metrics to Motivate Donors](#)
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- Give us a Call: 877-437-7765



Thank You

joan.benson@sage.com

jane.denis@sage.com



Upcoming Vision 2020 Offerings

JUNE 16 @ 1 p.m. EDT

Vision 2020 Plenary: Poverty in the US and implications of COVID-19 in developing and delivering innovate service responses

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MUTUAL OF AMERICA
Your Retirement Company

JUNE 17 @ 3 p.m. EDT

2020 Vision Sprint or Marathon: Claims Conference response to COVID-19 and what it means for today, tomorrow and next year

Questions should be sent in advance and by June 10 to SWAgencyInfo@claimscon.org

Registration links can be found in our newsletters or on our website: <https://www.networkjhsa.org/>.