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

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When Mission is the Beneficiary, Metrics Matter

- Funding
- Expenses
- Impact
Data & Metrics Make it Powerful

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.

<table>
<thead>
<tr>
<th>44,007</th>
<th>10,043,704</th>
<th>37</th>
<th>27</th>
</tr>
</thead>
<tbody>
<tr>
<td>Water projects funded</td>
<td>People will get clean water</td>
<td>Local partners</td>
<td>Countries</td>
</tr>
</tbody>
</table>

Where We Work
We fund water programs in 27 countries around the globe - in Asia, Africa, Central and South America. Water scarcity, poverty, political stability and strong partner organizations all play a part in where we choose to work. We focus on providing both communities with their first access to clean water.
Transparency Matters

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.
Visibility that Transforms—in Real Time
Going Beyond GAAP Reporting

Real-Time Outcome Metrics

- # Patients Served: 4,009 (up 7% vs. budget)
- # Encounters: 217,040 (up 5.35% vs. prior year)
- # of Clinicians: 85 (up 4% vs. prior year)
- Revenue per Clinician: $89,802 (this year)

Aggregate F&E by Clinic Location

Site Group:
- Total: 4,009
- Revenue: $89,802
- Expenditures: $0
- # of Clinicians: 85

Aggregate F&E by Practice Area Comparison

Program Services:
- Transitional Care: $0
- Vocational Services: $0
- Training Services: $0
- Administration: $0
Sage Intacct Cloud Platform
The Power of Integrating Best-in-Class Apps
Most Donors Research Orgs Before Giving

Prior to making contributions, donors consider the following factors:

<table>
<thead>
<tr>
<th>TOPIC</th>
<th>% OF DONORS WHO RESEARCH BEFORE GIVING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Efficiency</td>
<td>70%</td>
</tr>
<tr>
<td>Philanthropic Impact</td>
<td>59%</td>
</tr>
<tr>
<td>General Reputation</td>
<td>54%</td>
</tr>
<tr>
<td>Operating Costs</td>
<td>53%</td>
</tr>
<tr>
<td>Mission and Services</td>
<td>53%</td>
</tr>
<tr>
<td>Executive Salaries</td>
<td>43%</td>
</tr>
<tr>
<td>Funding Sources</td>
<td>31%</td>
</tr>
</tbody>
</table>

Bringing the Data Together

Key Metrics

Net Assets

Budget vs. Actual

Program Financials
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

“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

<table>
<thead>
<tr>
<th>13,000+ Total Customers</th>
<th>Over 32% Are Nonprofits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Room to Read®</td>
<td>UNIVERSITY CLINICAL HEALTH</td>
</tr>
<tr>
<td>MEALS ON WHEELS AMERICA</td>
<td>ATLANTA Convention &amp; Visitors Bureau</td>
</tr>
<tr>
<td>SIX NATIONS of MI:SA’S MI:SA’S</td>
<td>Boys &amp; Girls Clubs of Calgary</td>
</tr>
<tr>
<td>NO MORE VICTIMS</td>
<td>Conrad N. Hilton FOUNDATION</td>
</tr>
<tr>
<td>MADD</td>
<td>JASA</td>
</tr>
<tr>
<td>Women’s World Banking</td>
<td>Ontario Trillium Foundation</td>
</tr>
<tr>
<td>Film LA Inc</td>
<td>FOOD BANK</td>
</tr>
<tr>
<td>Lutheran SeniorLife</td>
<td>THOMAS FOOD BANK</td>
</tr>
<tr>
<td>THE ROYAL CANADIAN GEOGRAPHICAL SOCIETY</td>
<td>NATIONAL MARINE SANCTUARY FOUNDATION</td>
</tr>
<tr>
<td>ARCHDIOCESE OF DETROIT</td>
<td>United Way</td>
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<tr>
<td>dot DIGITAL OPPORTUNITY TRUST</td>
<td>United Way of the Ocoee Region</td>
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<tr>
<td>IFAC International Federation of Accountants</td>
<td>Khan Academy</td>
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<td></td>
<td>GEORGE LUCAS EDUCATIONAL FOUNDATION</td>
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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**
- **Follow us on Twitter**
- **Connect with Sage Intacct**
- **Give us a Call: 877-437-7765**
Thank You

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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 innovative service responses

Sponsored by

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/.