Empowering Nonprofits: Streamlining Reporting & Planning

November 14, 2024

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U.S. Presence

Top 10
U.S. Public
Accounting Firm*

$2bn+
Revenue (2023)

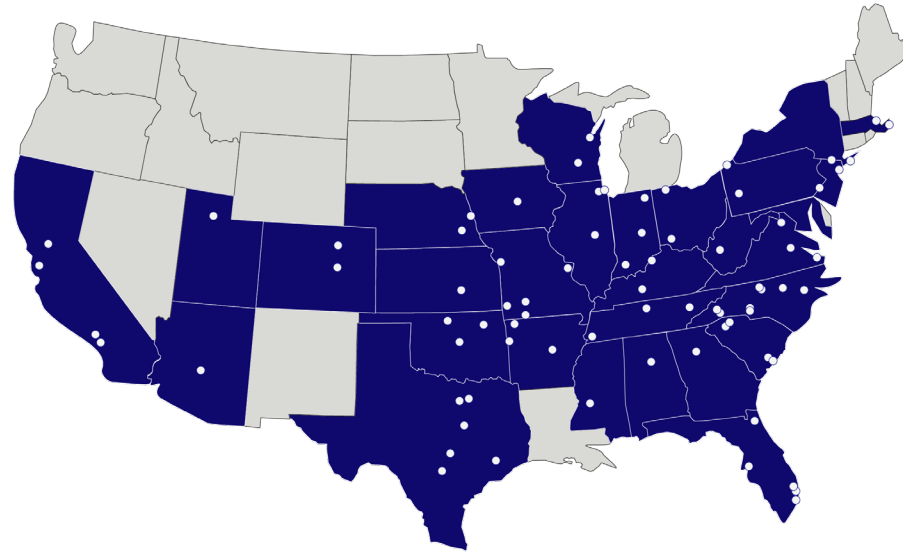## 76
Markets

29
States

600+
Partners & Principals

7,000+
Employees

*Source: Inside Public Accounting, based on most recent rankings
2023 combined revenues: FORVIS $1.7bn, Mazars USA (expected) $305m

As of August 2024

○ Forvis Mazars markets

Alabama
Birmingham

Arizona
Phoenix

Arkansas
Fort Smith
Little Rock
Rogers

California
Irvine
Los Angeles
Sacramento
San Jose

Colorado
Colorado Springs
Denver

Florida
Boca Raton
Jacksonville
Miami
Tampa Bay
West Palm Beach

Georgia
Atlanta

Illinois
Chicago Downtown
Chicago Oakbrook Terrace
Decatur

Indiana
Evansville
Fort Wayne
Indianapolis

Iowa
Des Moines

Kansas
Wichita

Kentucky
Bowling Green
Louisville

Massachusetts
Boston Brewster
Boston State Street

Mississippi
Jackson

Missouri
Branson
Joplin
Kansas City
Springfield
St. Louis

Nebraska
Lincoln
Omaha

New Jersey
Iselin

New York
Long Island
New York City

North Carolina
Asheville
Charlotte SouthPark
Charlotte Uptown
Greensboro

North Carolina (cont)
Greenville
Hendersonville
Raleigh
Winston-Salem

Ohio
Cincinnati
Toledo

Oklahoma
Enid
Oklahoma City
Tulsa

Pennsylvania
Erie
Fort Washington
Pittsburgh

South Carolina
Charleston
Greenville
Spartanburg
Summerville

Tennessee
Knoxville
Memphis
Nashville

Texas
Austin
Dallas
Fort Worth
Houston
San Antonio
Waco

Utah
Salt Lake City

Virginia
Norfolk
Richmond
Tysons, VA

West Virginia
Charleston

Wisconsin
Appleton, WI
Madison, WI

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Business Technology Services

Forvis Mazars provides enterprise resource planning (ERP) & customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, & support services.

Our end-to-end solutions help clients achieve their digital transformation goals by:

- Creating effective processes & strategies for future operations

- Designing & implementing modern operational systems

- Reviewing new business-facing technologies

- Leveraging existing investments in legacy technologies

- Integrating data solutions
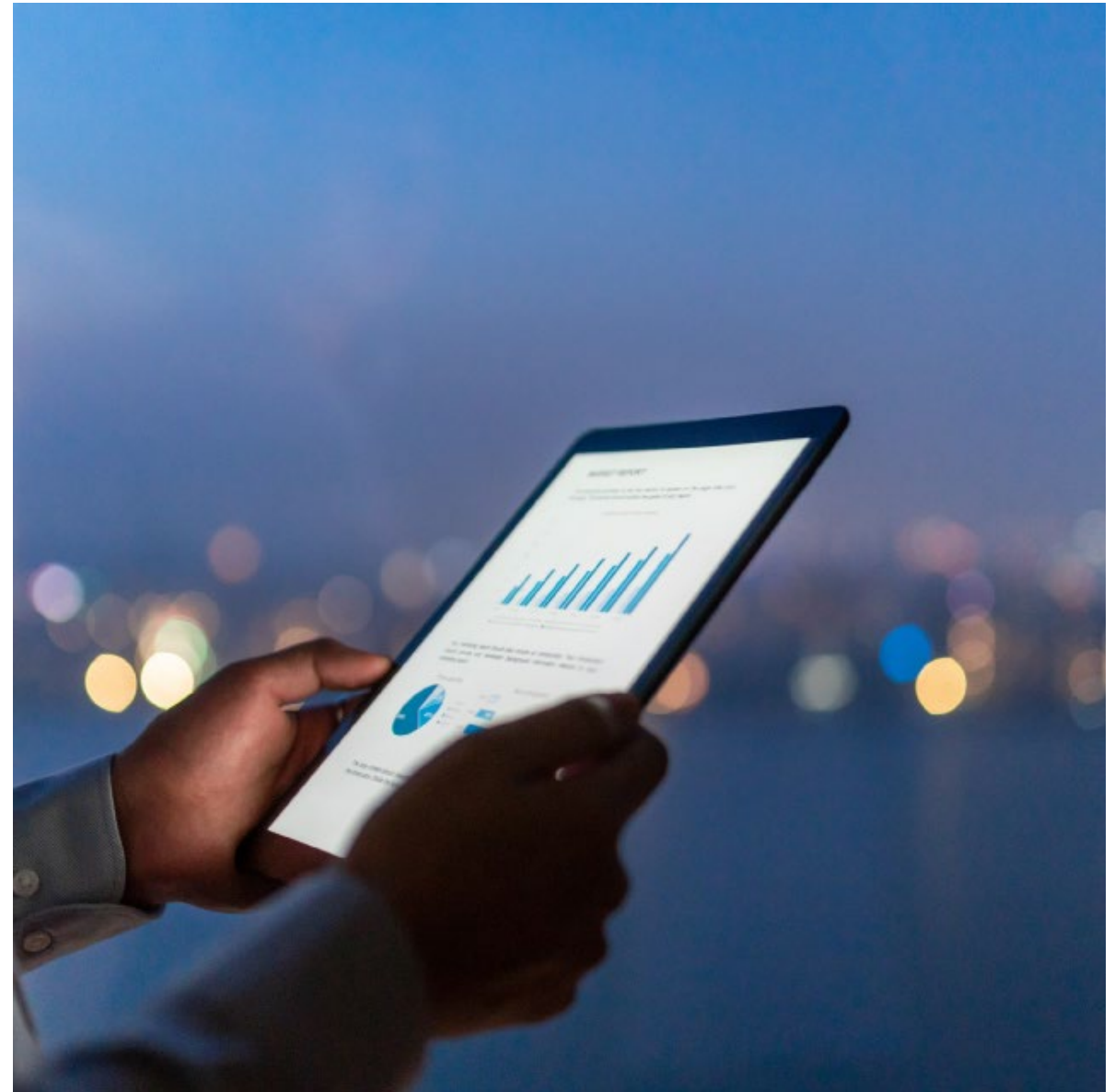
Business Technology Services

ERP

Microsoft Dynamics 365

Finance	Supply Chain
Commerce	Project Operations
Business Central	Dynamics GP

NetSuite

Sage & Sage Intacct

Trimble Viewpoint Spectrum & Vista

CRM

Microsoft Dynamics 365

Sales	Customer Service
Customer Insights	Field Service

Salesforce

Marketing Automation

Advanced Technology

Insights

Microsoft Power BI

Solver Planning & Analysis

Automation

Microsoft Power Platform

Robotic Process Automation (RPA)

App Development

Managed Services for business applications, IT, & cybersecurity support.

Microsoft Partner   ORACLE NETSUITE Solution Provider   Sage Partner   salesforce PARTNER   solver

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Today's Presenters

Business Technology Services Practice

"Our team is focused on delivering an Unmatched Client Experience® on every engagement."

– Chad Back, Partner

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Objectives

1. Describe how Solver can help streamline financial reporting

2. Explain how Solver's budgeting features can help nonprofits balance overhead costs & allocate resources efficiently

3. Outline the interactive examples of dashboards designed to help nonprofits

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Agenda

1. Key Challenges Facing Nonprofit Organizations

2. Reporting

3. Planning

4. Dashboards

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01

Key Challenges Facing Nonprofit Organizations

Common Reporting & Planning Challenges

- Nonprofits require good financial data to help plan, budget, & monitor finances

- Budget to actual comparisons, including current month, YTD, etc. – at department, program, or entity level with various levels of detail

- Monthly reporting packages with financial statements & specific details of key revenue & expense categories to help managers make operating decisions – KPIs

- Board packages, often at a higher level than what is reviewed by management, include various summary data & KPIs

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02

Reporting

Reporting
What Is Solver?

Cloud-based reporting & planning

Data warehouse

Connectors for multiple systems

Excel-based template design

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Reporting
Types of Data

Accounting Systems

- Blackbaud Financial Edge
- Sage Intacct
- Microsoft Dynamics ERP

Other Data

- Raiser's Edge
- iMIS
- CRM
- Payroll
- Fixed Assets

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Reporting
Process

Data
- Select fields from the data warehouse
- Apply filters
- Add grouping & sorting

Excel
- Add formatting
- Add formulas

Publish
- Publish the report
- Put the template in a shared category
- Share the results using Publisher

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Reporting
Report Design Experience

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Reporting
The Finished Report

Reporting
Statement of Activities

Reporting
Grants Overview

Reporting
Membership Overview

Demo

solver

03

Planning

Budgeting, Forecasting, & Other Input

Planning
Features

Data integration	Parameter-driven models	Web-based data entry
Budget workflow	Built-in comments & line items	Dynamic forecasting & modeling

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Planning
Process

Create a template

Set storage settings

Set up a workflow

Set assignments

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Planning
Long-Term Strategic Planning – Funding

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Planning
Membership Planning

Demo

solver

04

Dashboards

Dashboards
Tools for Data Visualization & Business Intelligence

Solver Reports

Power BI

Tableau

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Dashboards
Financial Analysis
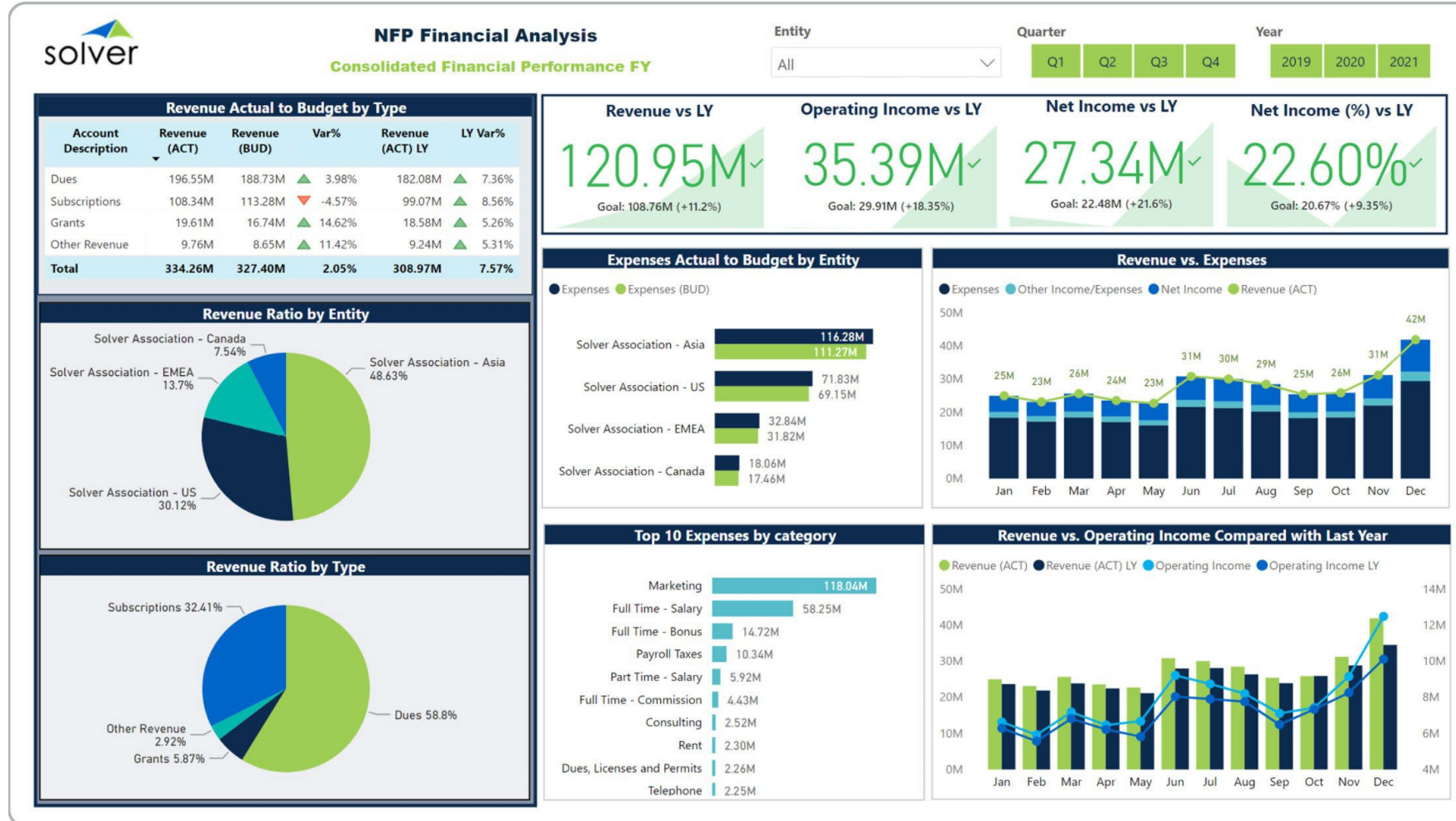
Dashboards
Nonprofit – Events & Grants Dashboard

Solver Templates
Marketplace & Examples

https://www.solverglobal.com/marketplaces-templates

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Q&A

Business
Technology
Services

Questions?

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Contact

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