Fundraising to Finance

How Nonprofits Can Overcome the Challenges of Disconnected Fundraising Software

Hosted by:

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Nonprofit Tech for Good

Welcome

Today's presenters:

Heather Mansfield

Founder and Editor-in-chief of Nonprofit Tech for Good

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Digital Marketing Manager
Sylogist, Ltd.

Chris Stevenson

Director, Sales
Sylogist, Ltd.

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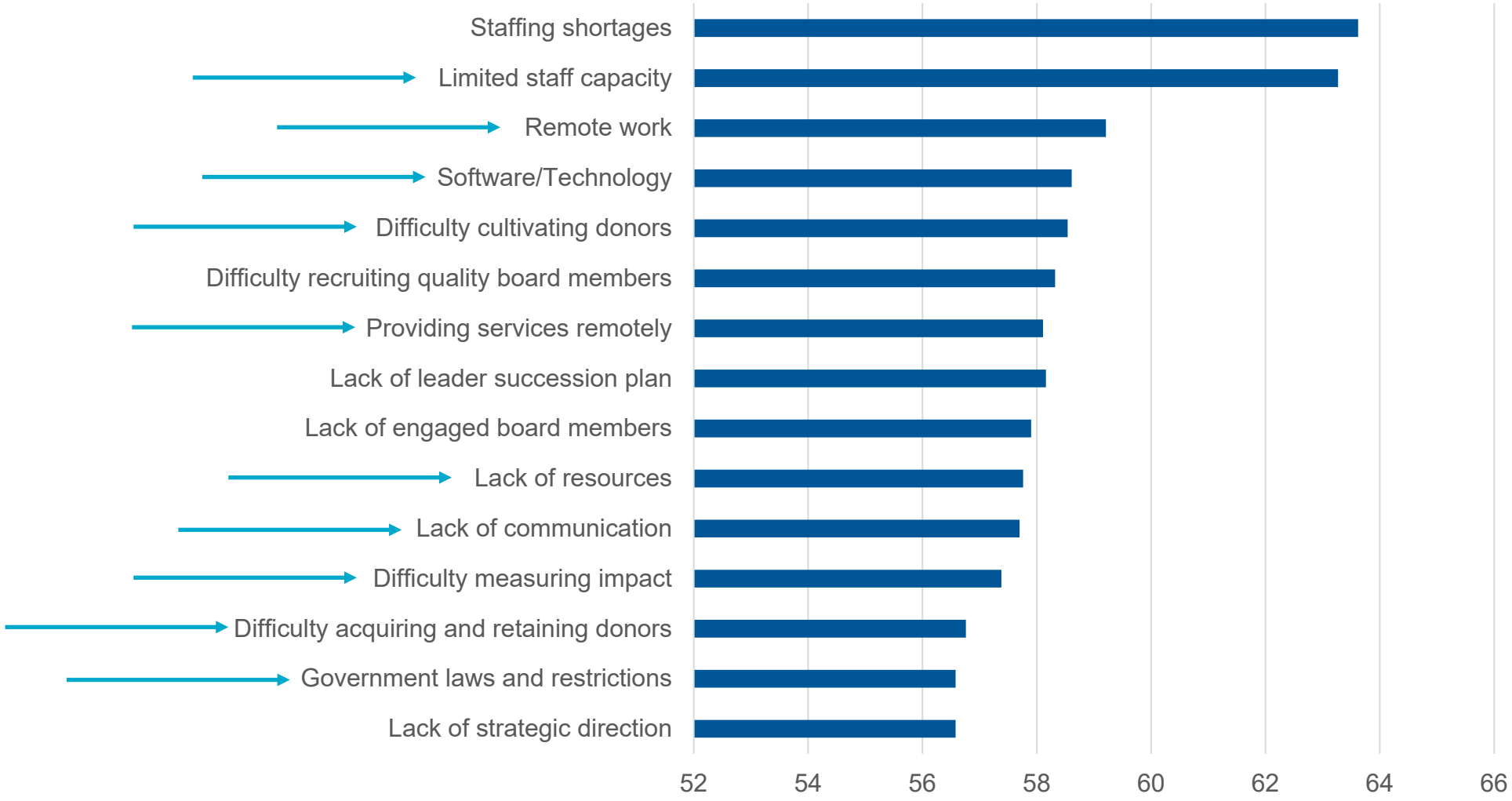
How nonprofits overcome challenges faced by disconnected fundraising systems, CRMs and Fund Accounting systems.

Biggest Challenges for Nonprofits in the United States in 2021



Source: https://www.statista.com/statistics/502411/us-nonprofit-organizations-biggest-challenges-for-fundraising/

Challenges and Opportunities Nonprofits Face

Nonprofits face a unique and complicated group of possible roadblocks and opportunities.

1. Changes in giving

2. Donor trust

3. Organizational structure and resources

4. Personalized asks

5. Relationship building

6. Software and technology

7. Limitations of financial software

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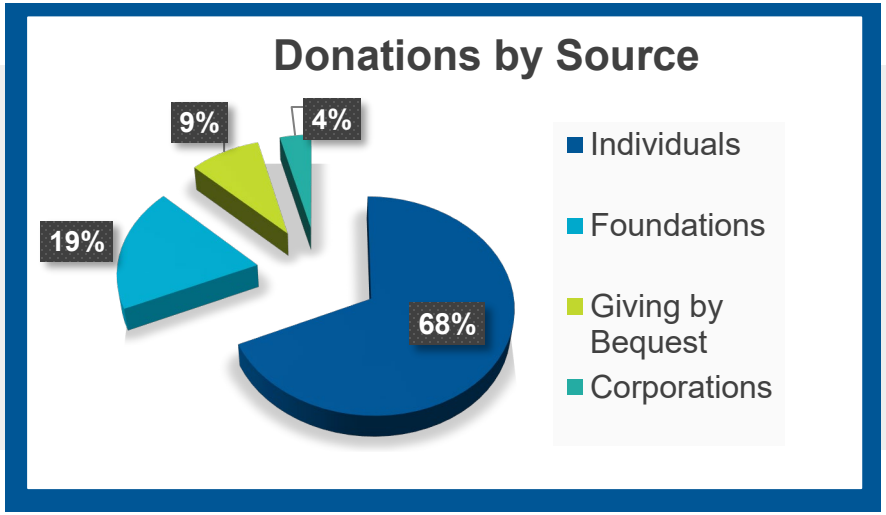
In **2021**, Americans gave

$485.85 billion (USD)

to charity

Source: Giving USA 2021, GivingUSA

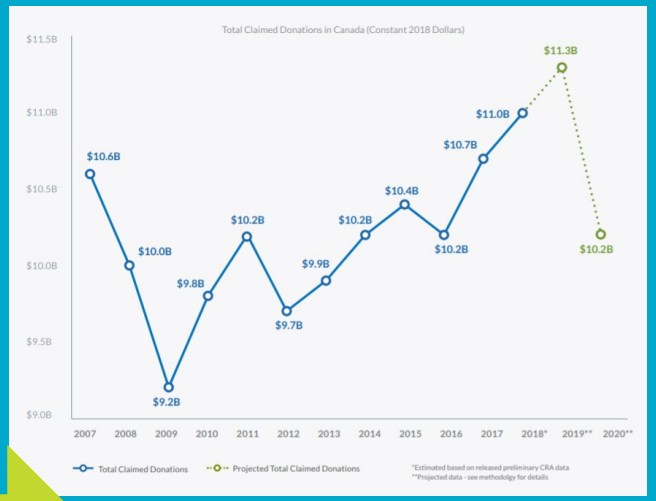


In **2020**, Canadians gave an estimated

$10.2 billion (CAD)

to charity

Source: The Giving Report 2021, Canada Helps



After steady growth in giving since 2012, Canadians are experiencing a decline in overall giving

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Not a Trend: Online Fundraising

32%

Total online giving increase in US in 2020.

Source: M+R Benchmarks 2021 Report, M+R Benchmarks

86%

Total online giving increase through CanadaHelps in 2020.

Source: The Giving Report 2021, Canada Helps

Generational preferences for giving

Millennials (1980-1994)

84% give to charity, donating an annual average of $481 across 3.3 organizations

11% of total US giving*

25.9% of US population

Respond best to:

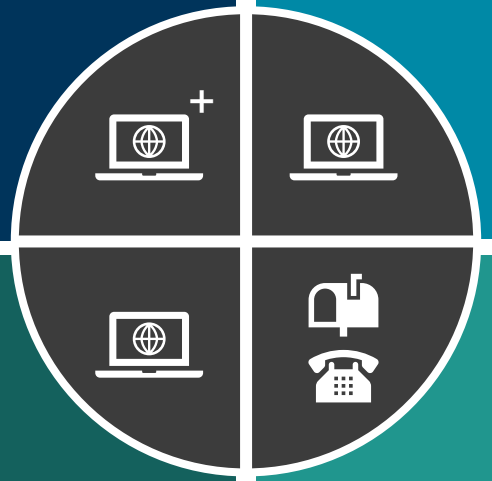
(1945-1964) Baby Boomers

72% give to charity, donating an annual average of $1,212 across 4.5 organizations

41% of total US giving**

23.6% of the US population

Respond best to:



20.4% of US population

Respond best to:

Gen Xers (1965-1979)

88% give to charity, donating an annual average of $1,367 across 6.2 organizations

26% of total US giving

11.8% of the US population

Respond best to:

(1901-1945) Greatest & Silent Gen

Contact method

Direct mail | Voice Calls | Emails | Text Messages | Social Media Posts

Preferred way to donate

Online Donations | Donate by phone | Response to direct mail

*Source: https://nonprofitssource.com/online-giving-statistics/

**Source: https://www.aarp.org/money/budgeting-saving/info-2018/boomers-most-charitable.html

+https://doublethedonation.com/nonprofit-fundraising-statistics/

Tax law changes in the United States

"By doubling the standard deduction, lawmakers essentially limited any financial incentive for middle- and working-class Americans to make charitable donations while keeping financial incentives in place for the wealthy, further fueling 'giving inequality.'"

NATIONAL COUNCIL OF NONPROFITS
National voice. State focus. Local impact.

Nonprofit Impact Matters: How America's Charitable Nonprofits Strengthen Communities and Improve Lives

https://www.nonprofitimpactmatters.org/site/assets/files/1/nonprofit-impact-matters-sept-2019-1.pdf

1. Changes in giving

Building and Maintaining Trust

Efficiency and Transparency

Demonstrating Impact

Data Security

Fraud Prevention

Source: https://www3.bostonglobe.com/metro/2018/01/27/taking-from-charity-employee-theft-shockingly-common-nonprofit-groups/aGzL6qg5JnhkAsAbj7tMkO/story.html?arc404=true

2. Donor trust

Nonprofit Staff

Staff Shortages

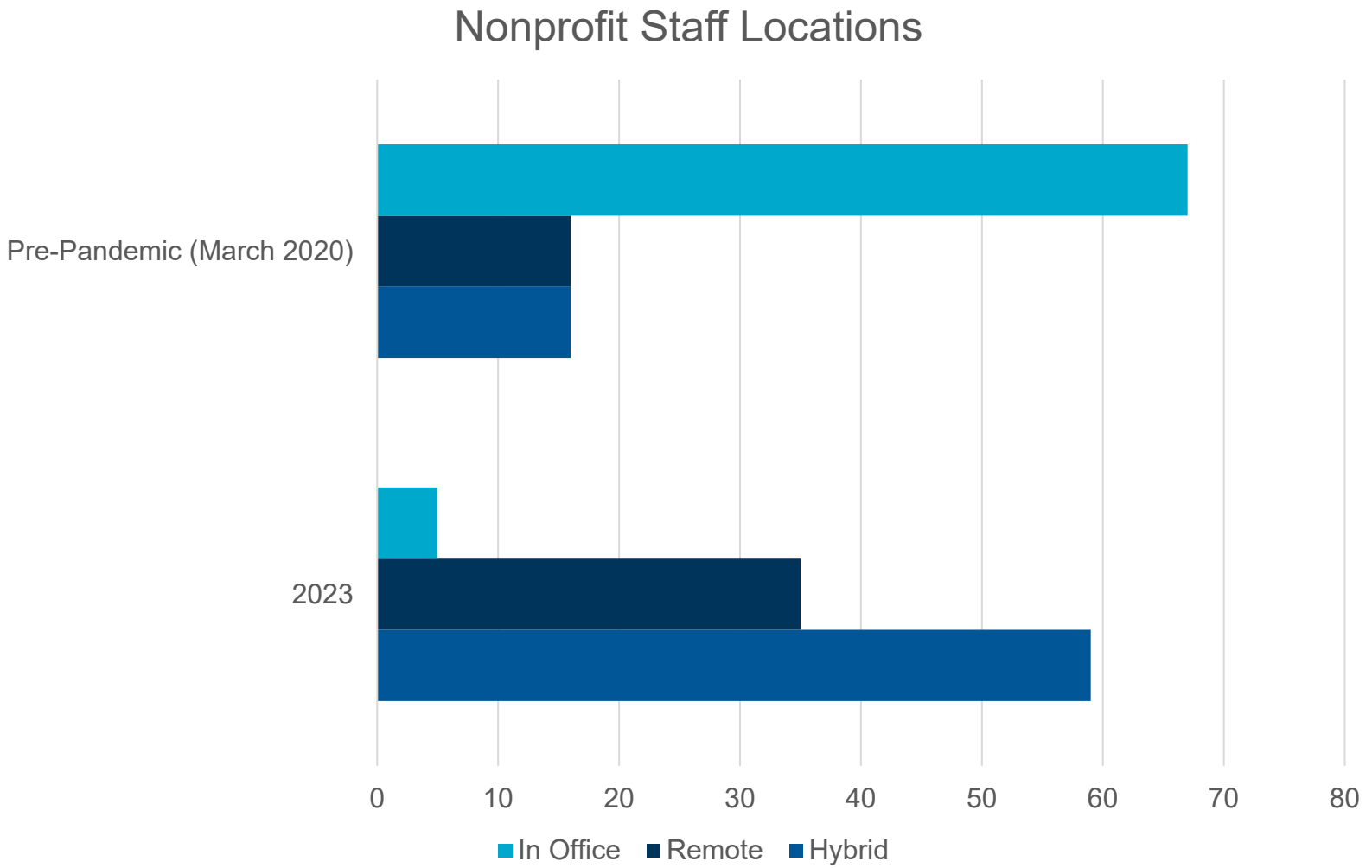
Burnout

High turnover

Technology time suck

Remote work

Change is hard



Source: 2023 Nonprofit Communications Trends Report | Nonprofit Marketing Guide

Giving is personal

Demonstrate impact

Analyzing fundraising and donor data

Individual donors are essential

77%

Donations come from individuals

*Source: Giving USA 2021, GivingUSA

73%

Say individual donors are key

Source: “Findings on US Donation Trends, 2015-2020”, The Urban Institute. https://www.urban.org/sites/default/files/2021/10/07/nonprofit_trends_and_impacts_2021_donation_fact_sheet.pdf

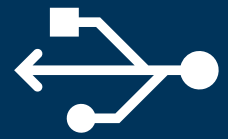
70%

of gifts come from one-time donors

Source: Quarterly Fundraising Report: Year-to-Date Nonprofit Sector Trends, Q3 2022 (Jan 1, 2022-Sep30, 2022), http://data.givingtuesday.org/fep-report/?_gl=1*rzr80n*_ga*OTUzMDgzNjYzLjE2ODAzNzU1MTI.*_ga_7V9HCQDSDN*MTY4MDM3NTUxMi4xLjAuMTY4MDM3NTUxMi4wLjAuMA

How nonprofits use and value technology

61% of nonprofits surveyed by NTEN said they include technology investments and/or goal in their annual strategic planning*



*Source: NTEN Managing Nonprofit Tech Change, 2022 Report, by Robert Hulshof-Schmidt
https://word.nten.org/wp-content/uploads/2021/02/Technology-Enabled-Operations-Report_February-2021.pdf

79% use automation technology in online fundraising

67% use Constituent Relationship Management (CRM) software

31% use automation for year-end tax statements**

*Source: “2023 Nonprofit Tech for Good Report”
https://www.nptechforgood.com/wp-content/uploads/2023/02/Nonprofit-Tech-for-Good-Report-Final2-2023.pdf

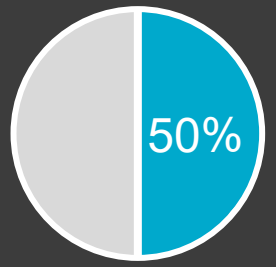
9% of nonprofits surveyed by NTEN said they have one comprehensive solution for enterprise resource planning (ERP)*

Problems with integration

1. **Multiple systems** with no integration
2. **Lack** of tech support or time for building **tech expertise** on staff
3. **Bad** data
4. Staff's **inability or unwillingness** to use technology
5. **Differing** data **needs** and **priorities** within organization*

How well does your email platform integrate with your donor database?

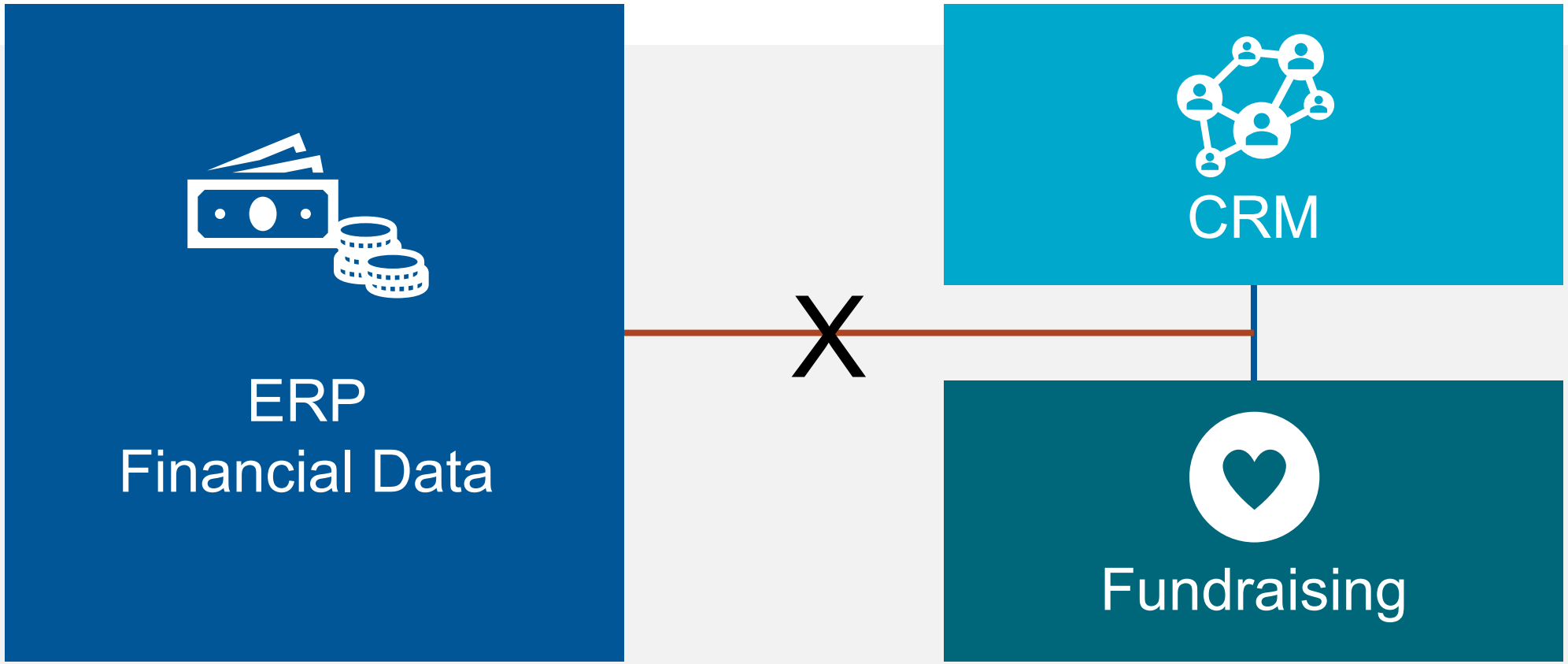
26% - full integrated
28% - partially integrated
46% - manual integration only*



Half of nonprofits must manually integrate email data with donor database*

*Source: 2023 Nonprofit Communications Trends Report | Nonprofit Marketing Guide

Disconnected systems



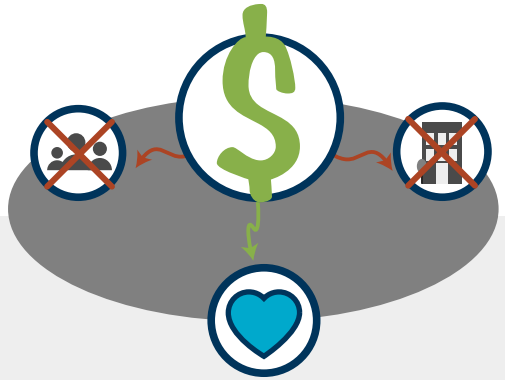
Limitations of standard accounting software

Nonprofits need to track unrestricted and restricted revenue

Unrestricted Funds

can to be used for any type of expenditure, including:

- Mission activities
- Staff salaries
-Employee training
- Rent and occupancy costs
- Software and hardware



Restricted Revenue

can only be used for the express purpose the funder has set. Some examples include:

- A foundation does not allow it's funds to be used for overhead expenses

- Community Foundation requires funds to stay local

- Donors want to fund a specific mission activity or research area

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Standard nonprofit requirements

Maintain balances between funds

Recognize the release of restrictions

Track commitments and encumbrances

Generate transparent, reliable reports at the fund level

These tracking requirements can become complicated when your programs are funded by different awards, each with its own timetable and expense eligibility criteria.

SylogistMission for Nonprofits

Financial Operations & Procurement

Executive Management

Payroll & Human Resource Management

Award, Grant & Program Management

Supply Chain & Material Management

CRM – Donor Management & Fundraising

Purpose-built to support the day in the life of a nonprofit

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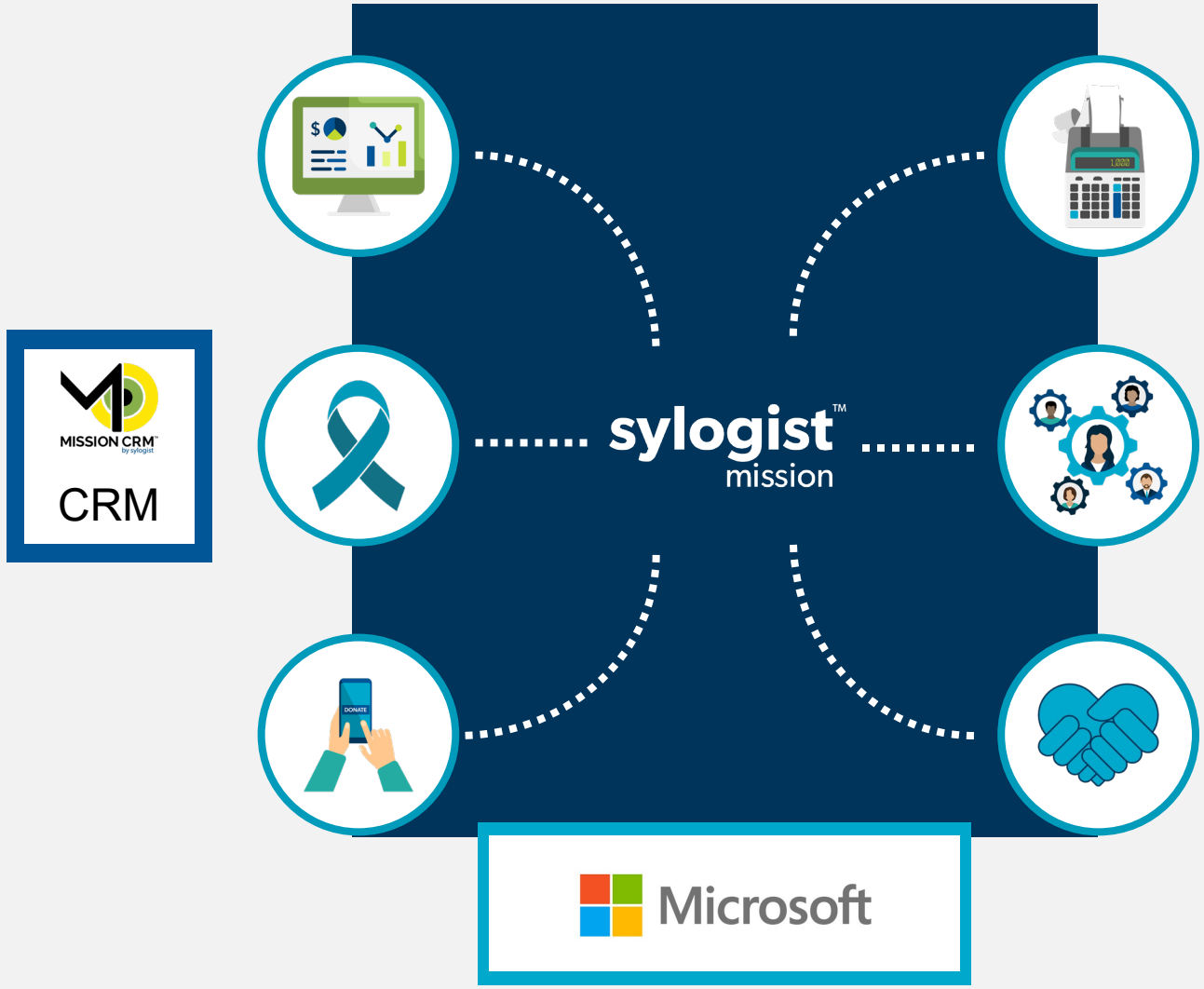
SylogistMission ERP & CRM



A seamless fundraising to finance solution available on Microsoft Dynamics 365 Business Central

The resources of a large company with the support of a small company

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CRM & ERP software created for nonprofits

sylogist™ partners

Value-Added Resellers provide professional and implementation services

Your Organization

sylogist™ | Knowledge Center

Award-winning knowledge center and customer success team

Microsoft Tech for Social Impact

Products built on Microsoft solutions

sylogistmission™ | ERP

Accountant Role Center

Dynamics 365 Business Central

Environment: NPO_Demo

SylogistMission ERP | Finance | Journals | Cash Management | Fixed Assets | Posted Documents

G/L Dimensions | Funds | Chart of Accounts | Vendors | Requisitions | Requisition Review | Purchase Orders | Approval Processing | More

Purchase Docu... Due Today	Purch. Invoices... Next Week	Purchase Disco... Next Week	Pending Approvals
34	0	0	3

User Tasks

My User Tasks

Pending User Tasks
27

Email Status

Email Activities

Failed Emails in Outbox	Draft Emails in Outbox	Sent Emails Last 30 Days
0	0	0

Self-Service

Time Sheets

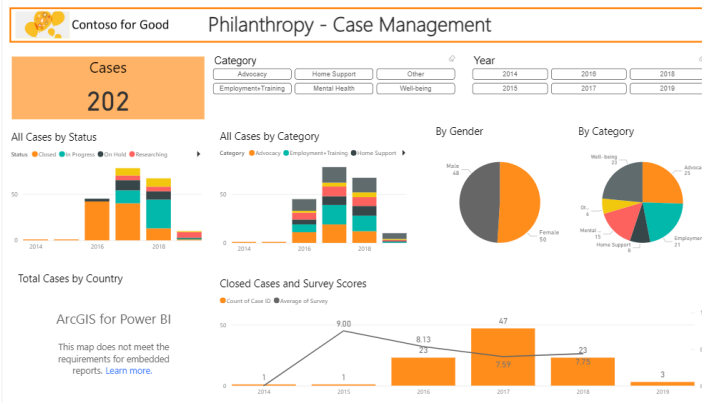
Open Time Sheets
0

Pending Time Sheets

Submitted Time Sheets	Rejected Time Sheets	Approved Time Sheets
0	0	0

Insights

Power BI Report



My Accounts

Account No.	Name	Balance
1010	Operating	-716,786.20
1020	Payroll	-766,725.53
1210	Accounts Receivable	215,231.00
2010	Accounts Payable	-253,279.94

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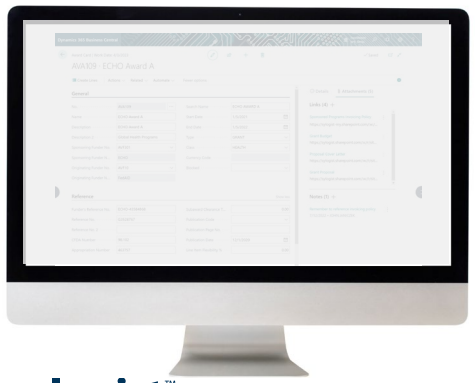
Award Management (grants, contracts & cooperative agreements)



Dynamics 365 Business Central

Environment: NPO_Demo

Award Card | Work Date: 4/3/2023

Saved

AVA109 · ECHO Award A

Create Lines | Actions | Related | Automate | Fewer options

General

No.	AVA109	Search Name	ECHO AWARD A
Name	ECHO Award A	Start Date	1/5/2021
Description	ECHO Award A	End Date	1/5/2022
Description 2	Global Health Programs	Type	GRANT
Sponsoring Funder No.	AVF301	Class	HEALTH
Sponsoring Funder N...	ECHO	Currency Code	
Originating Funder No.	AVF10	Blocked	
Originating Funder N...	FedAID		

Reference

Show less

Funder's Reference No.	ECHO-43584868	Subaward Clearance T...	0.00
Reference No.	G3528767	Publication Code	
Reference No. 2		Publication Page No.	
CFDA Number	98.102	Publication Date	12/1/2020
Appropriation Number	463757	Line Item Flexibility %	0.00

Details | Attachments (5)

Links (4)

Sponsored Programs Invoicing Policy
https://sylogist-my.sharepoint.com/:w:/...

Grant Budget
https://sylogist.sharepoint.com/:x:/r/sit...

Proposal Cover Letter
https://sylogist.sharepoint.com/:w:/r/sit...

Grant Proposal
https://sylogist.sharepoint.com/:w:/r/sit...

Notes (1)

Remember to reference invoicing policy
7/12/2022 • JOHN.JANICZEK

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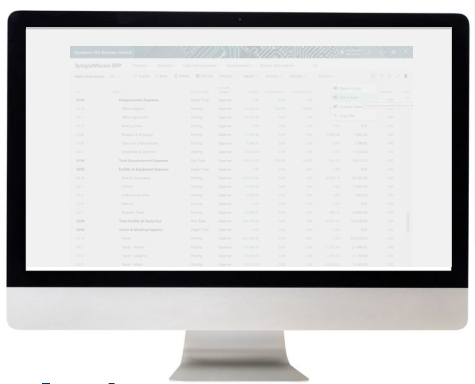
Nonprofit-Centric Chart of Accounts



Dynamics 365 Business Central

Environment: NPO Demo

SylogistMission ERP | Finance | Journals | Cash Management | Fixed Assets | Posted Documents

Chart of Accounts: All | Search | New | Delete | Edit List | Process | Report | Account | Balance | Actions

Open in Excel
Edit in Excel
Share to Teams
Copy link
Opens Excel connected to the source da

No.	Name	Account Type	Account Category	Budget	Commitments	Encumbrances			Statistical	Provi
8100	**Nonpersonnel Expenses**	Begin-Total	Expense	0.00	0.00	0.00			0.00	
8110	Office Supplies	Posting	Expense	13,552.00	289.90	144.95	8			
8111	Office Equipment	Posting	Expense	39,100.00	0.00	0.00			0.00	
8112	Banking Fees	Posting	Expense	0.00	0.00	0.00	0.00	0.00	0.00	
8120	Postage & Shipping	Posting	Expense	11,192.00	0.00	0.00	6,689.48	4,502.52	0.00	
8130	Dues and Subscriptions	Posting	Expense	7,348.00	0.00	0.00	0.00	7,348.00	0.00	
8131	Telephone & Telecom	Posting	Expense	13,324.00	0.00	0.00	0.00	13,324.00	0.00	
8199	**Total Nonpersonnel Expenses**	End-Total	Expense	84,516.00	289.90	144.95	7,565.93	76,515.22	0.00	
8200	**Facility & Equipment Expense**	Begin-Total	Expense	0.00	0.00	0.00	0.00	0.00	0.00	
8210	Rent & Occupancy	Posting	Expense	129,972.00	0.00	0.00	36,647.15	93,324.85	0.00	
8211	Utilities	Posting	Expense	17,024.00	0.00	0.00	0.00	17,024.00	0.00	
8212	Janitorial Services	Posting	Expense	7,600.00	0.00	0.00	0.00	7,600.00	0.00	
8230	Parking	Posting	Expense	0.00	0.00	0.00	0.00	0.00	0.00	
8231	Property Taxes	Posting	Expense	25,580.00	0.00	0.00	984.16	24,595.84	0.00	
8299	**Total Facility & Equip Exp**	End-Total	Expense	180,176.00	0.00	0.00	37,631.31	142,544.69	0.00	
8300	**Travel & Meeting Expense**	Begin-Total	Expense	0.00	0.00	0.00	0.00	0.00	0.00	
8310	Travel	Posting	Expense	633,630.00	0.00	0.00	0.00	633,630.00	0.00	
8311	Travel - Airfare	Posting	Expense	93,180.00	0.00	0.00	71,730.65	21,449.35	0.00	
8312	Travel - Lodging	Posting	Expense	35,564.00	0.00	0.00	4,457.50	31,106.50	0.00	
8313	Travel - Meals	Posting	Expense	34,920.00	0.00	0.00	24,556.51	10,363.49	0.00	

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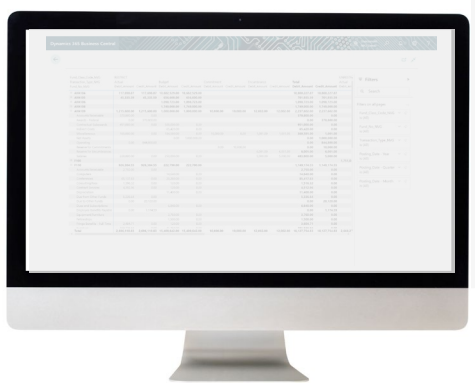
Power BI Reporting



Dynamics 365 Business Central

Environment: NPO_Demo

Fund_Class_Code_NVG / Transaction_Type_NVG / Fund_No_NVG	RESTRICT Actual Debit_Amount	Actual Credit_Amount	Budget Debit_Amount	Budget Credit_Amount	Commitment Debit_Amount	Commitment Credit_Amount	Encumbrance Debit_Amount	Encumbrance Credit_Amount	**Total Debit_Amount**	**Total Credit_Amount**	UNRESTRA Actual Debit_Am
AVA104	**117,698.87**	**117,698.87**	**10,682,529.00**	**10,682,529.00**					**10,800,227.87**	**10,800,227.87**	
AVA105	**45,335.59**	**45,335.59**	**656,600.00**	**656,600.00**					**701,935.59**	**701,935.59**	
AVA106			**1,098,723.00**	**1,098,723.00**					**1,098,723.00**	**1,098,723.00**	
AVA108			**1,749,000.00**	**1,749,000.00**					**1,749,000.00**	**1,749,000.00**	
AVA109	**1,215,600.00**	**1,215,600.00**	**1,000,000.00**	**1,000,000.00**	**10,000.00**	**10,000.00**	**12,002.00**	**12,002.00**	**2,237,602.00**	**2,237,602.00**	
Accounts Receivable	370,800.00	0.00							**370,800.00**	**0.00**	
Awards - Federal	0.00	370,800.00							**0.00**	**370,800.00**	
Contractual Subawards	451,000.00	0.00	500,000.00	0.00					**951,000.00**	**0.00**	
Indirect Costs			65,420.00	0.00					**65,420.00**	**0.00**	
Miscellaneous	165,000.00	0.00	184,580.00	0.00	10,000.00	0.00	1,001.00	1,001.00	**360,581.00**	**1,001.00**	
Net Assets			0.00	1,000,000.00					**0.00**	**1,000,000.00**	
Operating	0.00	844,800.00							**0.00**	**844,800.00**	
Reserve for Commitments					0.00	10,000.00			**0.00**	**10,000.00**	
Reserve for Encumbrances							6,001.00	6,001.00	**6,001.00**	**6,001.00**	
Salaries	228,800.00	0.00	250,000.00	0.00			5,000.00	5,000.00	**483,800.00**	**5,000.00**	
F100											**1,751,0**
F110	**926,384.55**	**926,384.55**	**222,790.00**	**222,790.00**					**1,149,174.55**	**1,149,174.55**	
Accounts Receivable	2,750.00	0.00							**2,750.00**	**0.00**	
Computers			14,640.00	0.00					**14,640.00**	**0.00**	
Conferences	65,137.83	0.00	20,280.00	0.00					**85,417.83**	**0.00**	
Consulting Fees	1,396.32	0.00	120.00	0.00					**1,516.32**	**0.00**	
Contract Services	4,392.96	0.00	120.00	0.00					**4,512.96**	**0.00**	
Depreciation			11,400.00	0.00					**11,400.00**	**0.00**	
Due from Other Funds	5,336.64	0.00							**5,336.64**	**0.00**	
Due to Other Funds	0.00	20,120.00							**0.00**	**20,120.00**	
Dues and Subscriptions			6,840.00	0.00					**6,840.00**	**0.00**	
Employee Benefits Payable	0.00	1,174.59							**0.00**	**1,174.59**	
Equipment/Furniture			3,760.00	0.00					**3,760.00**	**0.00**	
Fellowships			1,500.00	0.00					**1,500.00**	**0.00**	
Fringe Benefits - Full Time	3,484.71	0.00	120.00	0.00					**3,604.71**	**0.00**	
Furniture	159,776.94	0.00	41,760.00	0.00					**201,536.94**	**0.00**	
Total	**2,696,110.83**	**2,696,110.83**	**15,409,642.00**	**15,409,642.00**	**10,000.00**	**10,000.00**	**12,002.00**	**12,002.00**	**18,127,754.83**	**18,127,754.83**	**2,668,2**

Filters

Search

Filters on all pages

- Fund_Class_Code_NVG is (All)
- Fund_No_NVG is (All)
- Transaction_Type_NVG is (All)
- Posting_Date - Year is (All)
- Posting_Date - Quarter is (All)
- Posting_Date - Month is (All)

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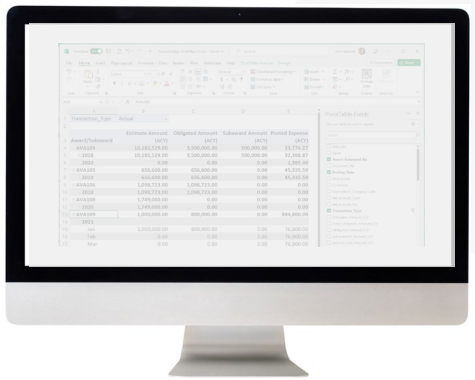
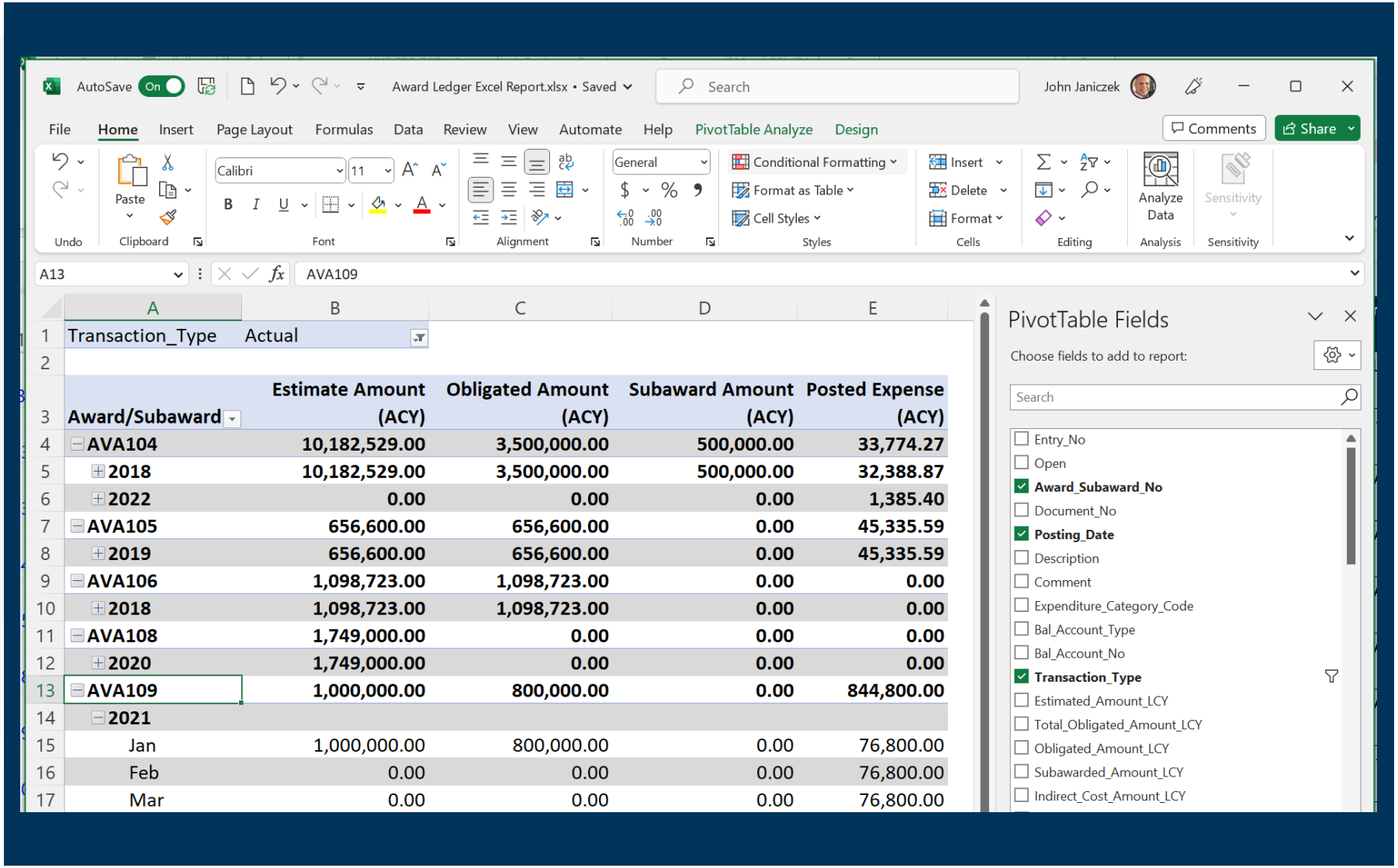
Publish key financial data directly to Excel





	A	B	C	D	E
1	Transaction_Type	Actual			
2					
3	Award/Subaward	Estimate Amount (ACY)	Obligated Amount (ACY)	Subaward Amount (ACY)	Posted Expense (ACY)
4	AVA104	10,182,529.00	3,500,000.00	500,000.00	33,774.27
5	2018	10,182,529.00	3,500,000.00	500,000.00	32,388.87
6	2022	0.00	0.00	0.00	1,385.40
7	AVA105	656,600.00	656,600.00	0.00	45,335.59
8	2019	656,600.00	656,600.00	0.00	45,335.59
9	AVA106	1,098,723.00	1,098,723.00	0.00	0.00
10	2018	1,098,723.00	1,098,723.00	0.00	0.00
11	AVA108	1,749,000.00	0.00	0.00	0.00
12	2020	1,749,000.00	0.00	0.00	0.00
13	AVA109	1,000,000.00	800,000.00	0.00	844,800.00
14	2021				
15	Jan	1,000,000.00	800,000.00	0.00	76,800.00
16	Feb	0.00	0.00	0.00	76,800.00
17	Mar	0.00	0.00	0.00	76,800.00

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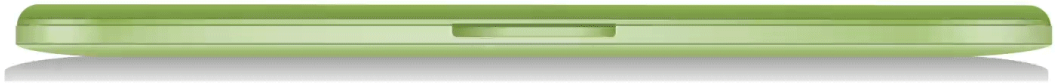
Get a 360-degree view of donors including giving history.

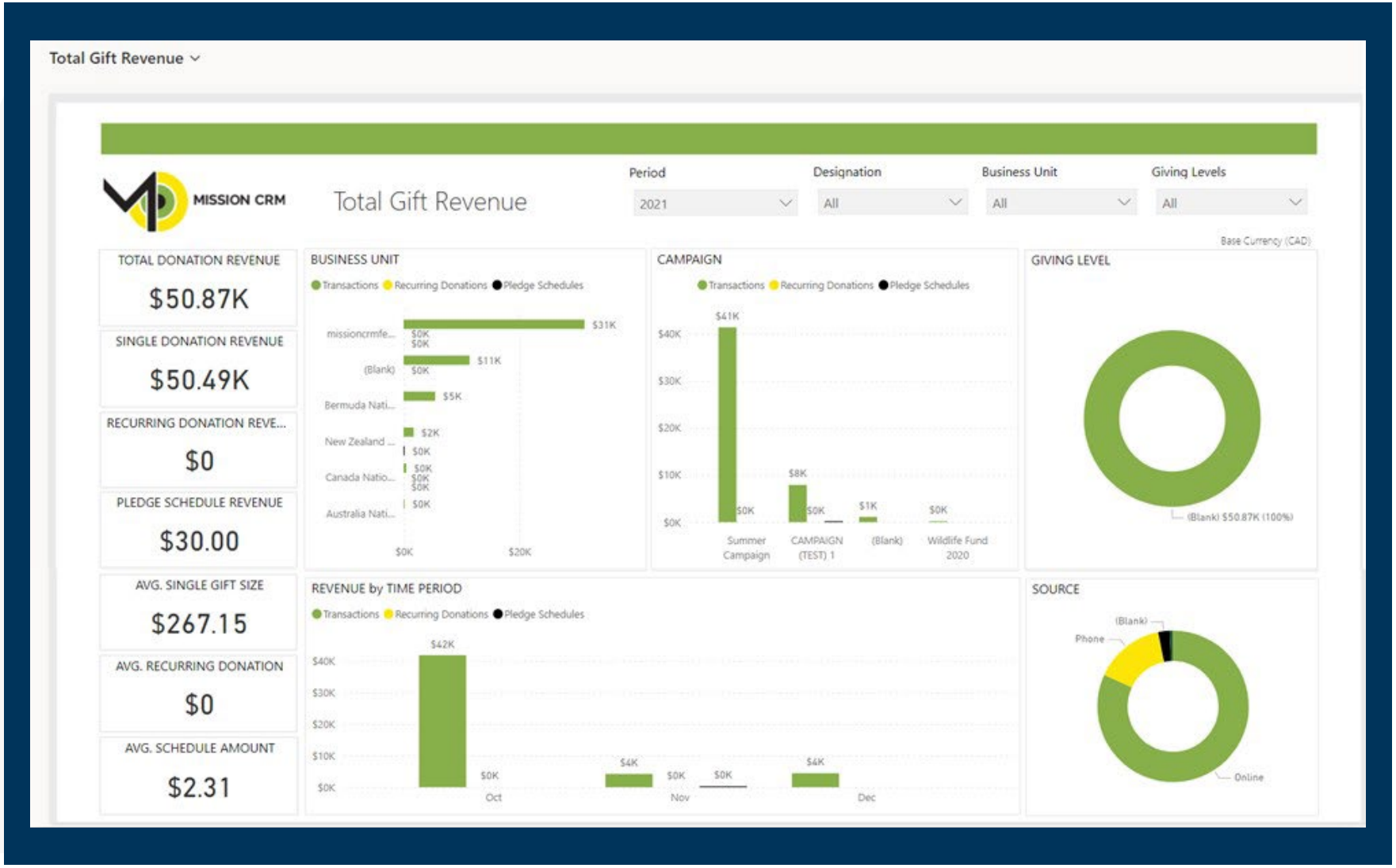


sylogist™

Nonprofit Tech for Good

sylogist mission™ CRM

Create Power BI data visualizations to gain powerful insights into your fundraising and donors.



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Easily view total revenue, pledges received, revenue streams, and restricted vs. unrestricted funds.

Revenue streams

Revenue split by restricted or unrestricted funds

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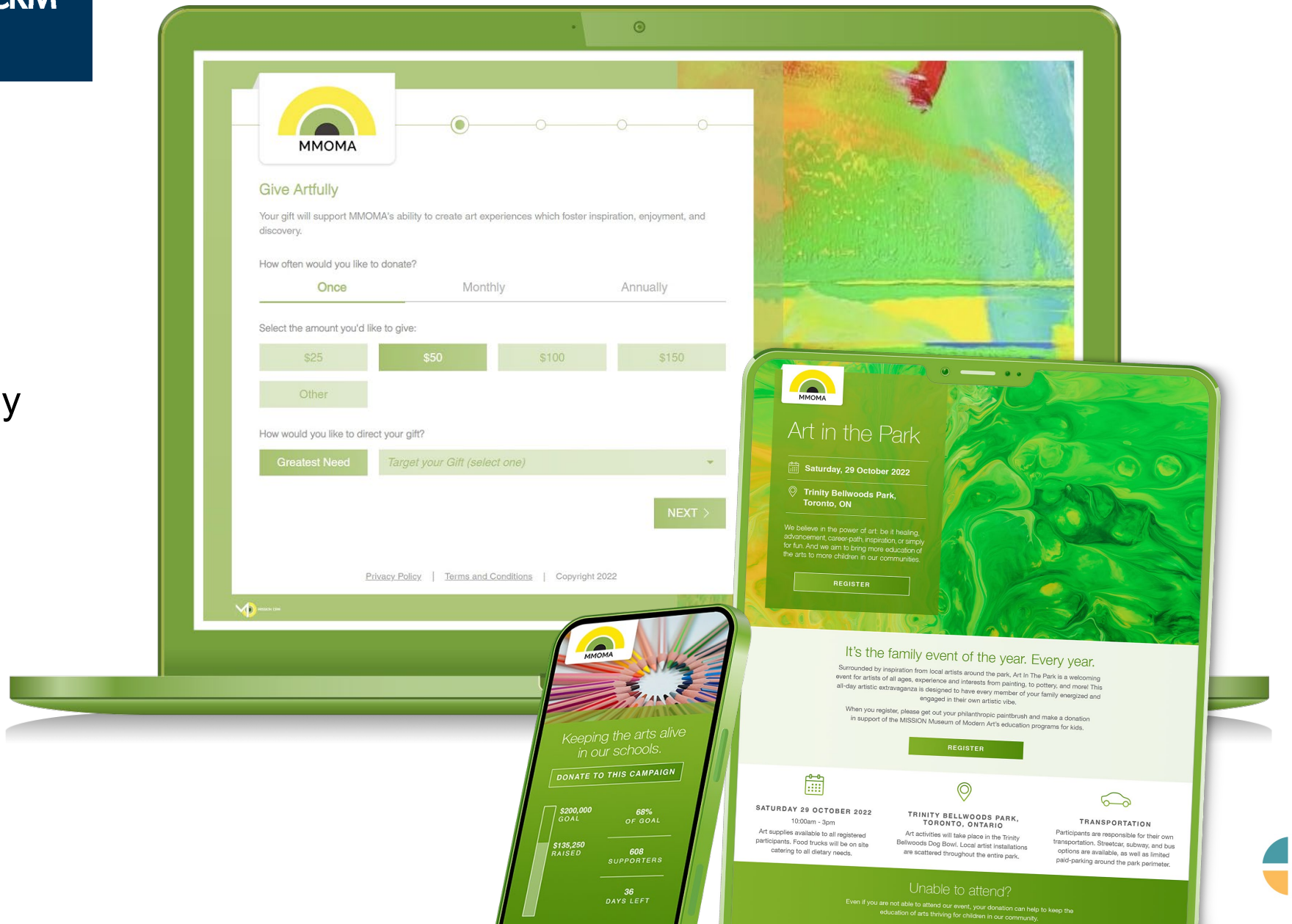
Create beautifully branded donation pages for, events, campaigns, monthly and annual giving, and more.



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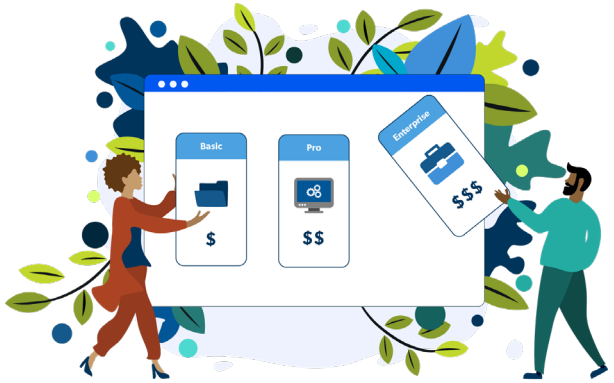
Questions?

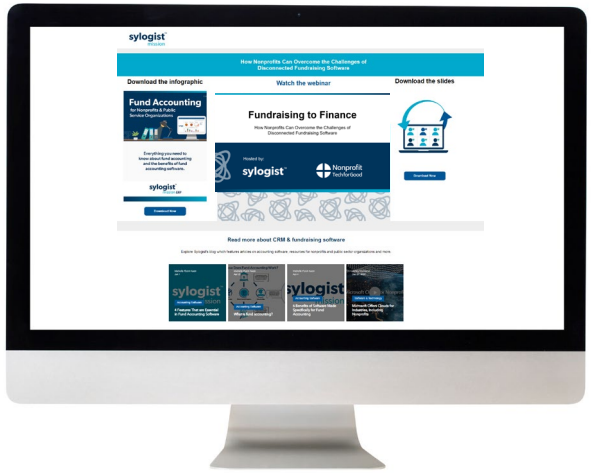
What now?



Schedule a Demo

Schedule a demo with one of Sylogist's nonprofit experts to see SylogistMission CRM & ERP in action.

https://www.sylogist.com/mission-erp-contact



View Slides and Other Resources on Our Website

Download e-guides, infographics, today's slide deck, view the webinar recording and more.

https://www.sylogist.com/nptech-webinar-06272023

Download Free Fund Accounting e-Guide

Review the basics of fund accounting for nonprofits and NGOs and view tips on how to choose the right fund accounting software for your organization.

https://www.sylogist.com/fund-accounting-complete