

# Delivering Results And Accountability

Not for Profit Organizations:  
focus on what really matters  
to make the greatest impact



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# Introduction

Due to fierce competition for donor resources, the push for accountability, efficiency, and transparency at not for profit organizations has never been greater. Your organization has to find new ways to demonstrate the value you're delivering. Full transparency into your organization – both internal and external – can lead to accountability and greater efficiency for maximum impact. But gaining that insight cannot divert resources that should be going to beneficiaries of your work.

Recent studies show that 60% of individual donors want proof that you are making a positive impact before making a second donation.<sup>1</sup> To prove (and improve) your impact, you first need to measure your performance.

When leading independent charity evaluators rate not for profit organizations based on financial health, accountability, transparency and reporting results, your organization has to prove that you are performing – without losing sight of delivering on your core purpose.

Technology is vital. Leading organizations are nearly three times more likely to include technology in their strategic plans compared to struggling organizations. The right technology is also important to keep costs in check: not for profits that consider themselves “struggling” with technology adoption spend nearly twice their operating budget on technology compared to the sector's average.<sup>2</sup>

Balancing the competing demands of accountability, efficiency and transparency so you can accomplish your highest potential requires a new approach to technology – one that serves the needs of your people and delivers results.

<sup>1</sup> *Software Advice Market Survey, 2014*

<sup>2</sup> *Non-profit Technology Enterprise Network Staffing and Investments Report, 2014*



# Unit4's not for profit experiences

As a member of the Association of Chief Executives of Voluntary organizations, and with strong involvement with Inside NGO and NetHope, Unit4 has substantial experience with more than 100 large NGOs and not for profit associations and foundations around the world. Our users can attest to the benefits that Unit4 provides to their organizations.



Unit4 Business World plays a central role in the ongoing success of The Salvation Army's IT strategy and wider business mission, making the organization more effective and efficient in the delivery of its message and programs. Over 3,000 members of The Salvation Army's teams access the finance and business information Unit4 Business World generates.

“ Having used Unit4 Business World for over 15 years, we recognize the value of such an agile, user friendly and functionally comprehensive solution. During this time we have experienced quite marked changes in how we operate, and the Unit4 Business World solution enables us to adapt our business to these changes seamlessly, quickly and with minimal disruption. We are keen to build on this success and responsiveness going forward.”

**Lieutenant Colonel Alan Read, Chairman**

“ Unit4 is revolutionizing the way the British Red Cross manages its financials information and reporting. We are simplifying our processes, reducing paperwork and pushing down administration costs and buy better managing the vital funds that are raised we can be more effective.”

**Carol O'Neill, Director of Finance**



“ We offer a wide range of services and often take on new programs unexpectedly. We needed an agile system that could help us respond to change efficiently so we could focus on more strategic, analytical thinking. Our organization and industry are evolving and Unit4 will help us scale operations, streamline regulatory reporting and improve our process flow. We chose a cloud deployment for similar reasons – to alleviate demand on IT staff to concentrate on our core mission.”

**Glen Mattera, CFO**

# Three criteria for success

## Accountability

**Challenge:** Satisfy the diverse and often changing reporting requirements of many donors.

**The solution:** Improve decision making with real-time financial information delivered in a way that is relevant to your people. This includes tracking grant expenditures in real-time, ensuring compliance with funding restrictions, centralizing documents in a single archive, and maintaining robust security with controlled access for data integrity.

## Transparency

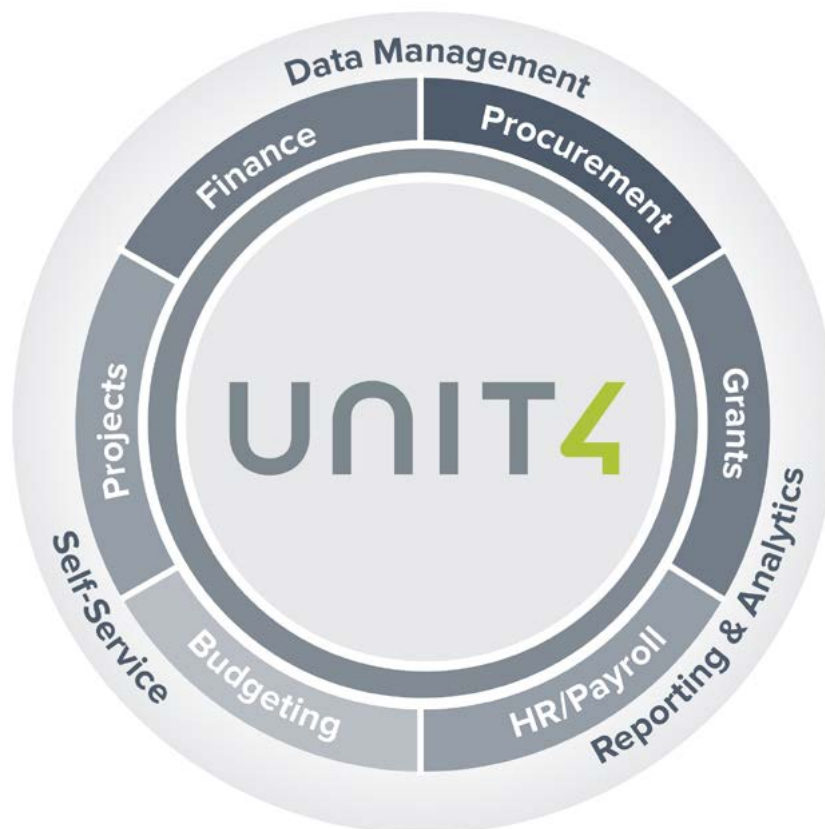
**Challenge:** Improve decision making with real-time, accurate financial information.

**The solution:** Accurately view your financial health at any time, from anywhere, and be confident you are looking at a single version of the truth. This includes monitoring KPIs via role-based dashboards, the ability to report quickly and accurately, and maintaining a full audit trail showing responsibility and approvals for any process.

## Efficiency

**Challenge:** Eliminate manual, error-prone processes that distract workers from the core focus of their work.

**The solution:** Streamline administrative processes, automate workflows and free staff to focus on higher value-added activities. This includes eliminating manual checking and report running, offering web-based and mobile employee self-service tools, streamlining paperless approval processes, and minimizing or eliminating third-party tools to simplify your IT environment.



# Put purpose and people at the heart of your system

The people at your organization are there because they want to make a difference in the world. It is time that they gained digital tools that work the way they work, in the locations they work – from desk to field site, and everywhere in between – so they can concentrate on fulfilling your organization’s mission.

Rather than burdening staff with traditional data entry tasks or diverting their energy into rigid software tools, liberate them to work better and smarter. When you provide comprehensive, role-specific tools that are consistent across the organization, you can empower your people to fulfill their purpose with passion. And when they have the ability to change the functionality of their software without hard coding, everyone can keep pace in fast-changing environments.

The Unit4 approach to enterprise software is fundamentally different from other technology providers. We believe your ERP should be your ultimate strategic partner, working with you to enhance your operations and to make the most of your most important assets – your employees and volunteers.

## The People Platform

Unit4’s People Platform offers a whole new level of capabilities designed around the needs of people. It is a solution that is built to harness the latest advances in key technologies including social, mobile, predictive analytics, cloud computing and big data.

**Empower People:** Provide intuitive access to relevant, complete information that makes for superior productivity and adoption.

**Embrace Business:** Integrated, out-of-the-box business capabilities offer flexible support.

**Embed Digital:** Simplify business processes and gain predictive analytics for actionable insights.

**Enable Change:** Extend-and-Relate™ capabilities and Flexi-Fields enable you to react and adapt quickly.

With the People Platform, your technology works the way your people work. Integrate with in- house and specific best-of-breed solutions that you’re already using. You can extend, change and update the system with a simple graphical user interface instead of relying on limited IT resources for complicated technical processes.

# Keep your supporters up to date

Are you able to connect donations to their impact? When you can deliver operational transparency to your donor base, supporters will remain up to date on your progress and engaged with the future success of your organization. The challenge is to keep your donors informed about the help they are providing, trace funds and benchmark results, but without diverting attention or resources from your core mission.

Donors are more likely to continue supporting your organization if they stay engaged with your mission. 70% of not for profits report that the majority of their funders are asking for impact metrics in reports, but 26% of these groups are not yet collecting sufficient data to measure how their services improve the lives of clients.<sup>3</sup> Only 50% of not for profits are tracking client outcomes, limiting their ability to communicate their effectiveness to donors.<sup>4</sup> Such organizations risk losing support to groups that can clearly show their impact.

Beyond aggregated data, there's no better way to communicate your effectiveness than to show them the benefits their donation created. When you have transparency in the financial chain, you can show supporters where and how you are deploying funds. Benchmark results in regular reports can show your financial and social impacts with clear performance indicators. Best of all, the same tools that provide donors with insight into your organization also provide internal transparency, so you can make better-informed decisions.

## Tracking the path of a Dollar

Your supporters want to make sure their money is going to the most deserving recipients and making the greatest impact. This means that you have to demonstrate the value your organization delivers – a task best served by combining accurate, up-to-date data with emotional stories that tell individual stories in the larger context of your mission.

Tracking the path of a dollar – showing how a given resource affects recipients on the front lines – is one of the most powerful ways to provide external transparency and communicate the importance of your work. It ties together the hard data and the emotional story and motivates donors to continue support.

Delivering this level of transparency and accountability relies on integrated tools combining financial tracking, talent resource management and project-level analysis to provide a holistic, real-time view of your organization's activities.

The same approach to track the impact of a donation down to the project level can help you execute as well: placing the right people and resources in the right projects at the right time. Likewise, benchmarking results to show donors your financial and social impacts can help you make the best operational decisions. Real-time reporting capabilities are only possible by continuously tracking the path of each dollar, employee and volunteer – information valuable to you and to your donor base.

<sup>3</sup> *Non-profit Finance Fund State of the Nonprofit Sector Survey, 2015*

<sup>4</sup> *Non-profit Technology Enterprise Network State of Nonprofit Data, 2012*

# View your financial health at any time

Every not for profit organization depends on financial resources to accomplish its mission. Groups that harness the power of an army of volunteers still need to pay for organization, materials and fundraising – and they need to forecast their future financial needs accurately.

It is critical that leaders can accurately view your organization's financial health at any time, from any location, and be confident they are all looking at the same version of the truth. These capabilities place you on solid financial footing so you can maximize your impact:

- Track grant expenditures in real-time and ensure compliance with grant restrictions.
- Enjoy fast, accurate reporting of your double bottom line – financials and mission.
- Streamline information-sharing across your organization.
- Operate seamlessly and transparently in one community or around the world.
- Maintain a full audit trail showing responsibility and approvals for any process.
- Automate budget checking to monitor the availability of funds.
- Manage a global pool of people, capital and assets.

When your organization works around the world, it is critical that your financial technology provides multi-department, multi-lingual and multi-currency capabilities with simple, flexible tools that match the way your organization functions.

## The evolution of not for profit accountability

In the not for profit sector, there is the sizzle, and then there is the steak. While the emotional appeal is what might draw potential donors your way (the sizzle), the foundation of your organization exists in its financial accounting (the steak). With the largest charity evaluators relying on financial health and financial accountability to rank not for profit organizations, it is important to know how well your organization looks financially.

Financial health goes far beyond calculating overhead costs. Instead, not for profit financial accountability addresses deeper questions about the insight you have into your operations, and what you can share with donors and regulators alike.

- Can you track expenditures in real-time to ensure you're using donor resources properly?
- Can you satisfy the various reporting requirements of multiple donors and regulatory agencies, across multiple currencies and languages?
- Is your organization auditable, with a clear trail of funding and project expenses?
- Do you have insight into the grant management process?

To stand out among donors looking for accountability, you need a digital solution that helps your organization track and account for every resource in real time. It needs to restructure processes on the go to match your changing operations, and report data efficiently so you can focus on your core mission. The new standard in not for profit accountability transcends annual reports and financial statements. Choose the financial tools that simultaneously provide information that satisfies external stakeholders and insight to run a more effective organization.



# Concentrate on helping others

Are you able to adapt your processes to changing environments so that your organization's efforts are focused in the right place? If your technology isn't able to change with the speed of your programs, chances are high that staff will be spending excessive time on administration and manual tasks rather than higher-value services.

Unit4 Business World offers not for profit organizations a new choice for enterprise software: inherently flexible applications to help you effectively manage change and deliver lasting social benefits. The solution helps organizations improve efficiency and effectiveness by connecting you to the information you need, when you need it. The result is a reduced administrative burden with new capabilities to address opportunities faster, more cost-effectively and without disruption.

- Gain real-time, accurate financial and resources information that satisfies the data requirements of your donor base.
- Show donors clearly and continuously the impact they're making.
- Enter data, create reports and act on information presented equally on desktop browsers or in the field via mobile apps.
- Benefit from multi-currency capabilities and software localization to comply with reporting requirements.

Ultimately, your software should streamline administrative processes and automate workflow to help your people fulfill your organization's higher purpose.

## **Accountability and transparency: two sides of the same coin**

Reporting is sometimes considered a necessary evil among not for profits. Administrative overhead needed to maintain compliance and demonstrate results to donors can distract from the organization's core mission. But leading not for profit organizations know that reporting is not just a burden: the same tools and mindset that satisfy outside groups (accountability) can help your organization gain internal visibility (transparency) to become more effective with the resources available.

For example, what if the methods of tracking and reporting success externally provided real-time transparency into projects and campaigns, and enabled you to place the right people in the right projects at the right time?

Fulfilling your accountability-transparency potential means automating processes to plan, manage, track and report on your activities. This helps projects stay on course and makes optimal use of precious human and capital resources. Whether managing the full grant management process, monitoring progress via KPI visualizations, or integrating information across multiple countries and projects, your organization can deliver both accountability and transparency – two sides of the same coin.

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# A solution built for not for profit organizations

Your people should not be distracted by repetitive manual processes and ad-hoc spreadsheets. Software tools should make back-office functions and routine administrative tasks easier, so that your organization can focus on delivering higher-value services to the beneficiaries of your work.

Unit4's integrated solutions replace inefficient, disparate systems, allowing users across your organization access to relevant organization-wide information. And when the reporting requirements of multiple donors develop, regulations change or your core functions evolve, your tools will be ready to grow and adapt to meet tomorrow's priorities.

Put technology completely under your people's control, from the executive office to the individual front-line user. Change requires no coding, eliminating the costs and delays required to customize traditional ERP. Information stays fully integrated so that each update automatically populates throughout the software. As a result, your people can focus on their mission, instead of waiting for IT to catch up. When your people create solutions with Unit4's tools, the IT bottleneck disappears and your systems evolve with your programs and mission.

Access to intuitive, powerful tools is a tremendous boost for your people. Eliminate their frustration with technology, and put them on the projects that match their skills and passion. When your people are effective, your organization will reach new levels of performance.

Ultimately, Unit4 Business World's Self-Driving ERP liberates your people's time and resources for front-line services so they can concentrate on the ultimate goal – helping others.



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## About Unit4

Unit4 is a leading provider of enterprise applications empowering people in service organizations. With annual revenue north of 500M Euro and more than 4000 employees world-wide, Unit4 delivers ERP, industry-focused and best-in-class applications. Thousands of organizations from sectors including professional services, education, public services, not-for-profit, real estate, wholesale, and financial services benefit from Unit4 solutions. Unit4 is in business for people.

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