Modernize Your Mission

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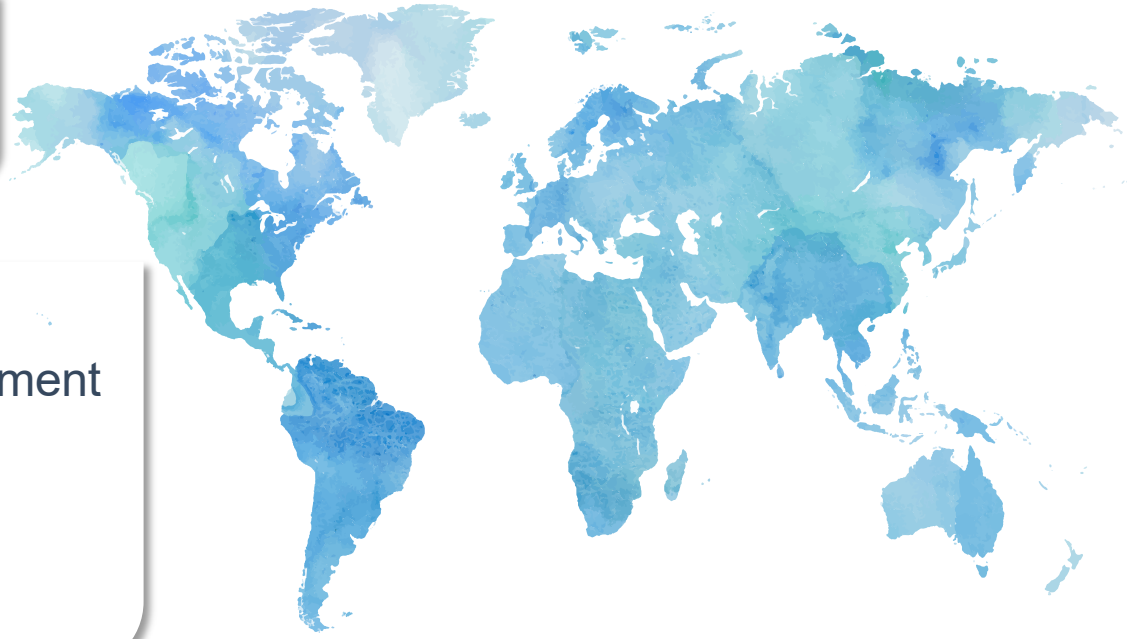
550+
TEAM MEMBERS



OFFICES
Indiana
Kentucky
North Carolina
Ohio

EXPERTISE
- Audit, tax, & risk management
- Business consulting
- IT innovation, compliance, & cybersecurity

NATIONAL RESOURCES
An independently owned member
RSM US Alliance
RSM

CLIENTS
- Privately held businesses and related individuals
- Public companies
- Nonprofit and governmental entities

INSIDE public accounting TOP 100 FIRMS 2024

GEOGRAPHIC REACH
- Throughout the United States
- Internationally including Japan, Brazil, Canada, China, throughout Europe and Australia

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Technology to Meet Challenges Head-On

Biggest nonprofit challenges - external

- Economic uncertainty
- Inflation
- Funding competition
- Staff shortages
- Increased demand for services

The role of the finance leader

- 59% - Document transparency and accountability
- 45% - Track and measure program results
- 31% - Chart growth
- 25% - Track and measure mission impact metrics

Bottom line: your finance team is crucial to success

Biggest nonprofit challenges - internal

- Lack of process automation and efficiency
- Manual reporting
- Disconnected systems
- Lack of data visibility
- Budgeting and planning challenges

Are spreadsheets your technology teddy bear?

- They’re familiar
- They make us feel safe
- They’re simple

… but it’s ok to let go

What you need to let go of the teddy bear

- Automated financial reporting
- Integrated systems
- Better fund accounting
- Automated outcome metrics
- Automated purchase and spend controls
- Entity consolidation

Digital transformation enables you to:

- Be a good steward of donor dollars and funds
- Plan for the future in periods of uncertainty
- Focus on strategy – not routine tasks
- Get a holistic view of your organization with integrations

Sage Intacct for nonprofits

- Comprehensive accounting specific to nonprofits
  - Customizable dimensions
  - Outcome metrics
  - Grant and fund allocation
- Real-time reporting
- Forms and operational flows
- Integrations with
  - DonorPerfect
  - FACTS
  - Kanso
  - Many more with hundreds of marketplace partners

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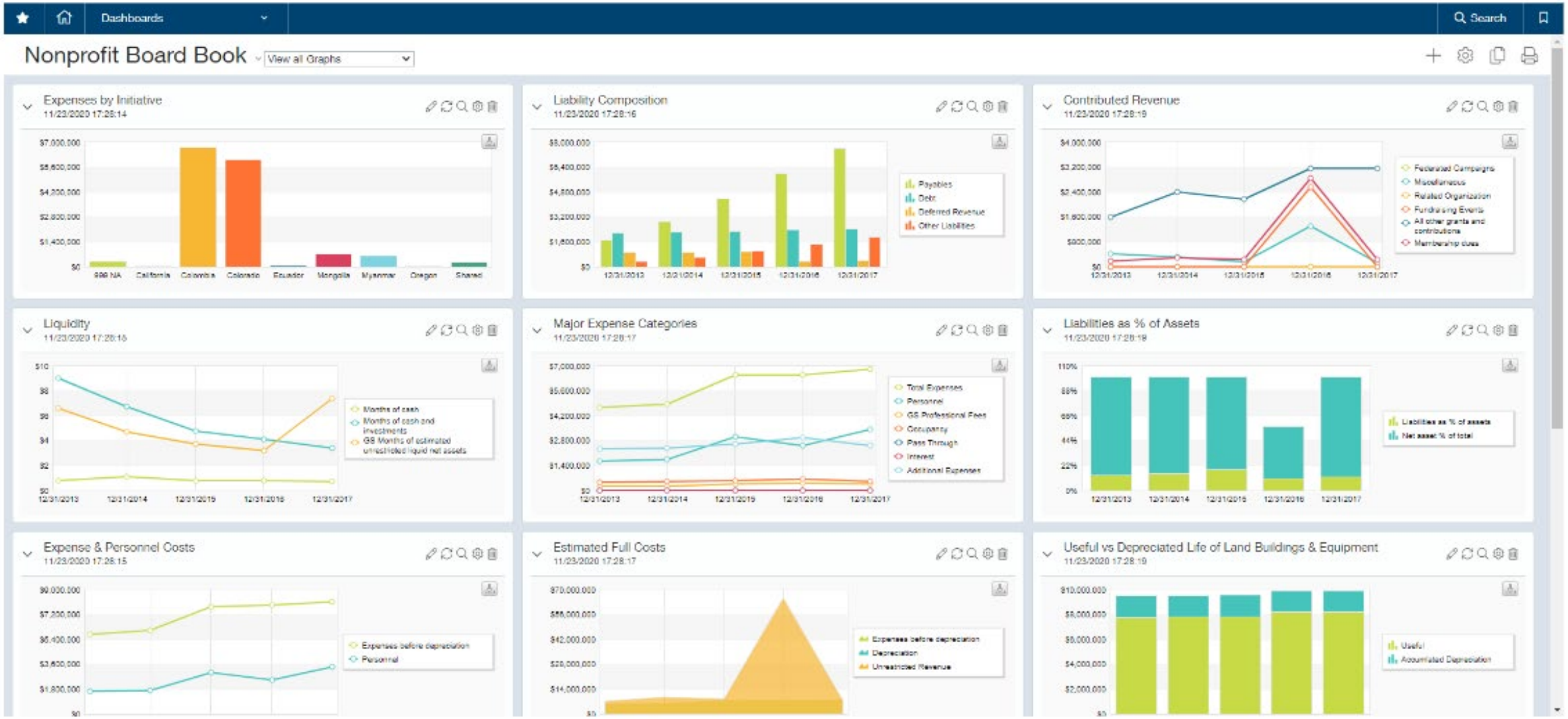
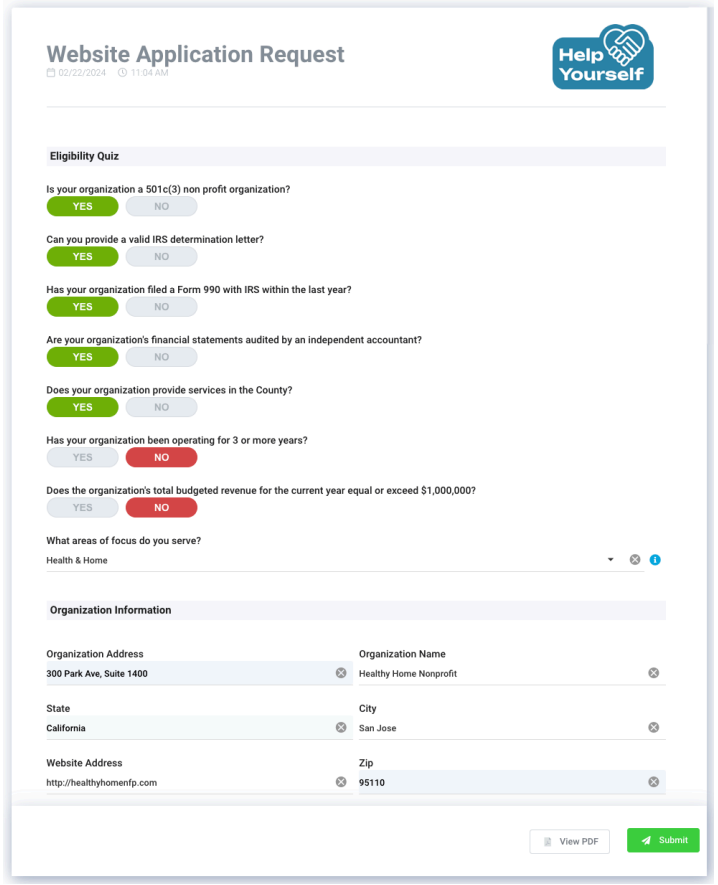
Dashboards for metrics that matter

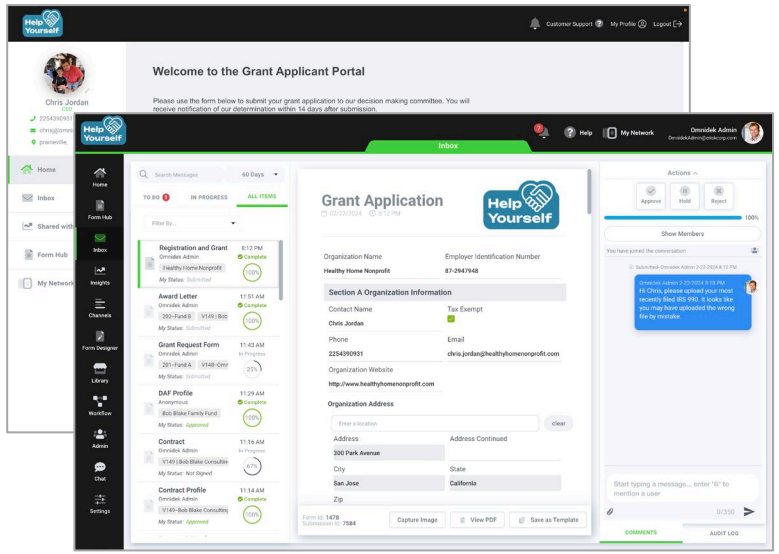


Forms and Operational Flows

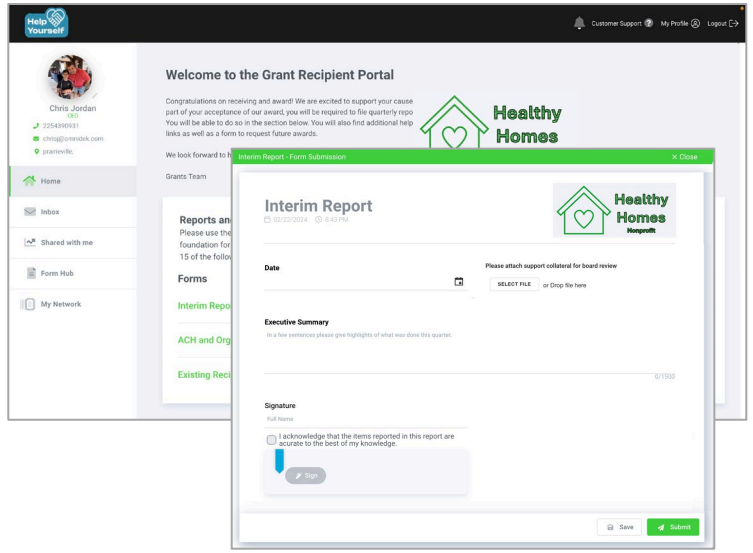
Eligibility determination



Application processing

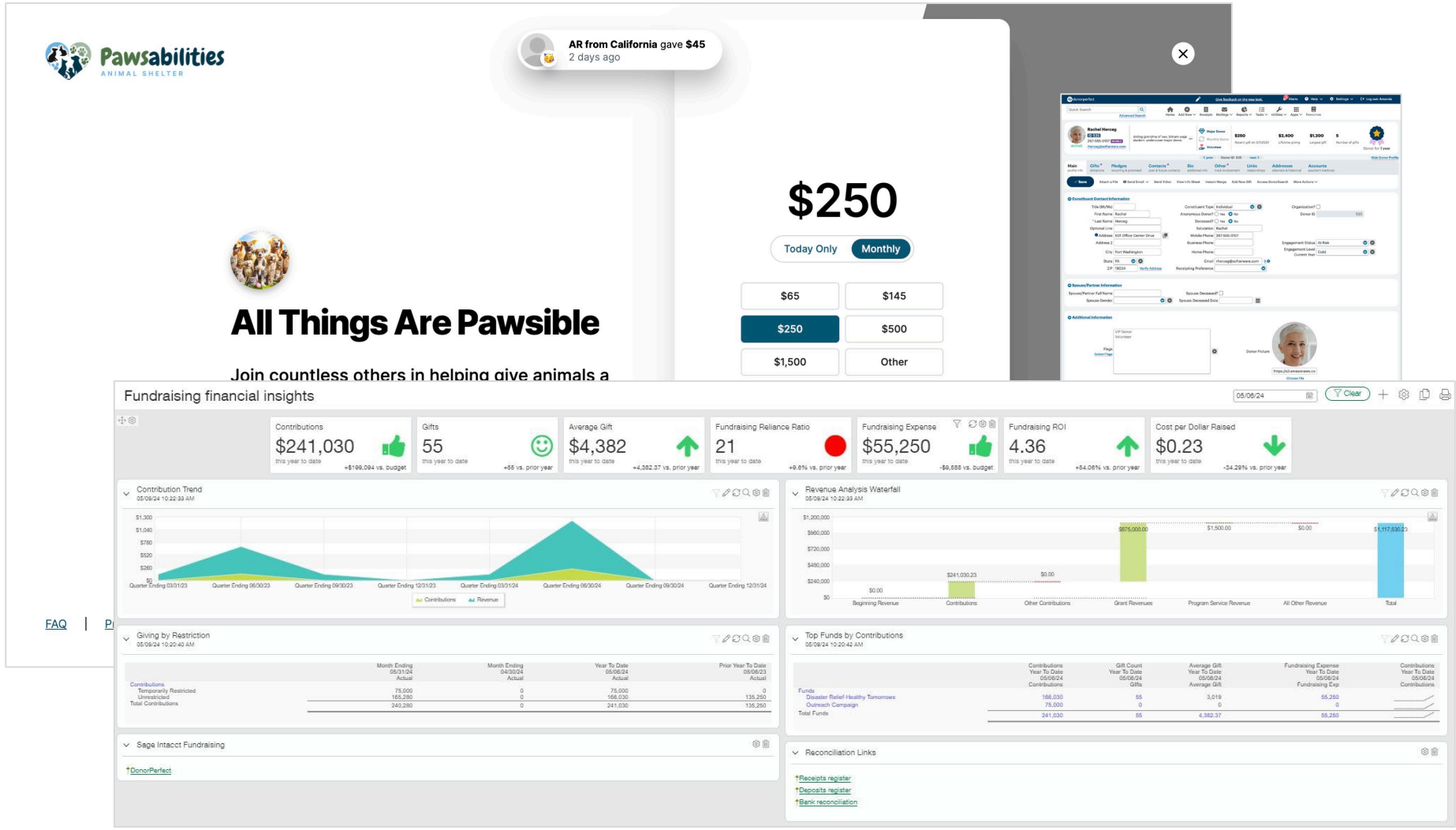


Awarded grants management



Extend Sage Intacct with fully configurable portals, forms, and workflow

Sage Intacct Fundraising powered by DonorPerfect



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Accounting, Payroll and HR Hand-in-Hand

People are at the core of what you do

- Payroll is a core part of your finances
  - Largest journal entry
  - Most complex – especially for nonprofits
- Hiring and retaining the right employees is critical to your success

ADP Workforce Now - Sage Intacct

General ledger data: Push of journal entries from ADP WFN GLI into Sage Intacct General Ledger.

Employee data: Push of employee changes entered in ADP WFN to Sage Intacct Contact and Employee Records.

Expense reimbursements: A 360 integration with expense reports inbound from Sage Intacct Time & Expenses application to ADP WFN and the recording of the reimbursement (via G/L) outbound from ADP WFN to Sage Intacct Time & Expenses Reimbursements.

Dimensions time sync: Pull of dimension values from Sage Intacct to Time & Attendance labor charge fields.

Outbound time: Push of timecard data from ADP WFN Time & Attendance to Sage Intacct Time & Expenses Timesheets.

Inbound time: Pulls timesheet data from Sage Intacct Time & Expenses into ADP WFN Time & Attendance.

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Sage Intacct Payroll powered by ADP Workforce

More than a product, it's an ecosystem

HR, Onboarding, Surveys, & Compliance

Compensation Management

Performance, Engagement, Succession Planning, & Learning Management

Benefits & ACA

Reporting, Analytics & Benchmarking

ADP Mobile

Payroll & Tax

ADP DataCloud

ADP Marketplace

Timekeeping, Attendance, Scheduling

Recruitment, Screening & Selection

Retirement

Workers Compensation

ADP Wage Garnishments

ADP Unemployment Claims

ADP Tax Credits

Wisely by AD

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Solutions Designed for Not for Profits

- ✓ With **one click** Automate your “Time & Effort” Reporting
- ✓ Provides an additional level of flexibility for the design of Time/Payroll modules
- ✓ Delivers an easy to adopt interface for employees
- ✓ Provides greater accuracy and visibility
  - Payroll, General Ledger/Financials
  - Reports to clients or funding sources down to the timesheet level
  - **Greater justification during an audit**
- ✓ With accurate allocation and time/effort tracking you won’t **lose funding or lose access to securing additional funds**

Spreadsheets can’t do this…

- Automatically allocate worked time to grants & funds
- Show all your payroll and people data in one dashboard
- Keep you up to date on tax laws and HR regulations
- Detect errors BEFORE you process payroll
- Save time (an average of 200 hours) on administrative tasks
- Empower employees with self service

… but Sage Intacct Payroll powered by ADP now can!

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Wisely by AD

Demo

Questions?

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Thank you

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