

Modernize Your Mission

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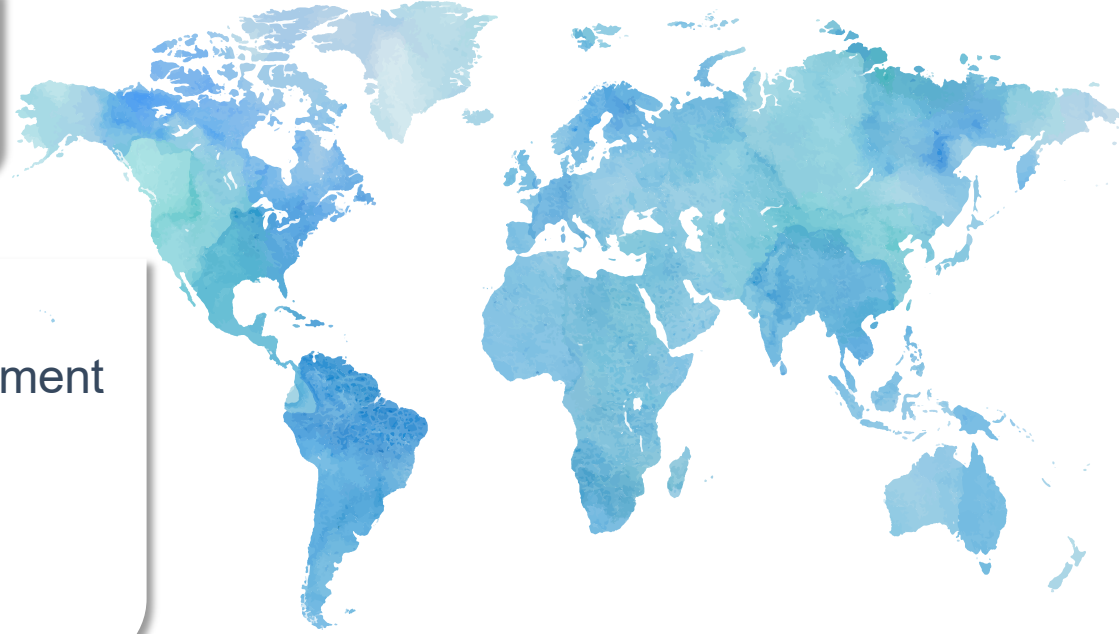
550+
TEAM MEMBERS

EXPERTISE

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

CLIENTS

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



OFFICES
Indiana
Kentucky
North Carolina
Ohio

NATIONAL RESOURCES

An independently owned member
RSM US Alliance



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

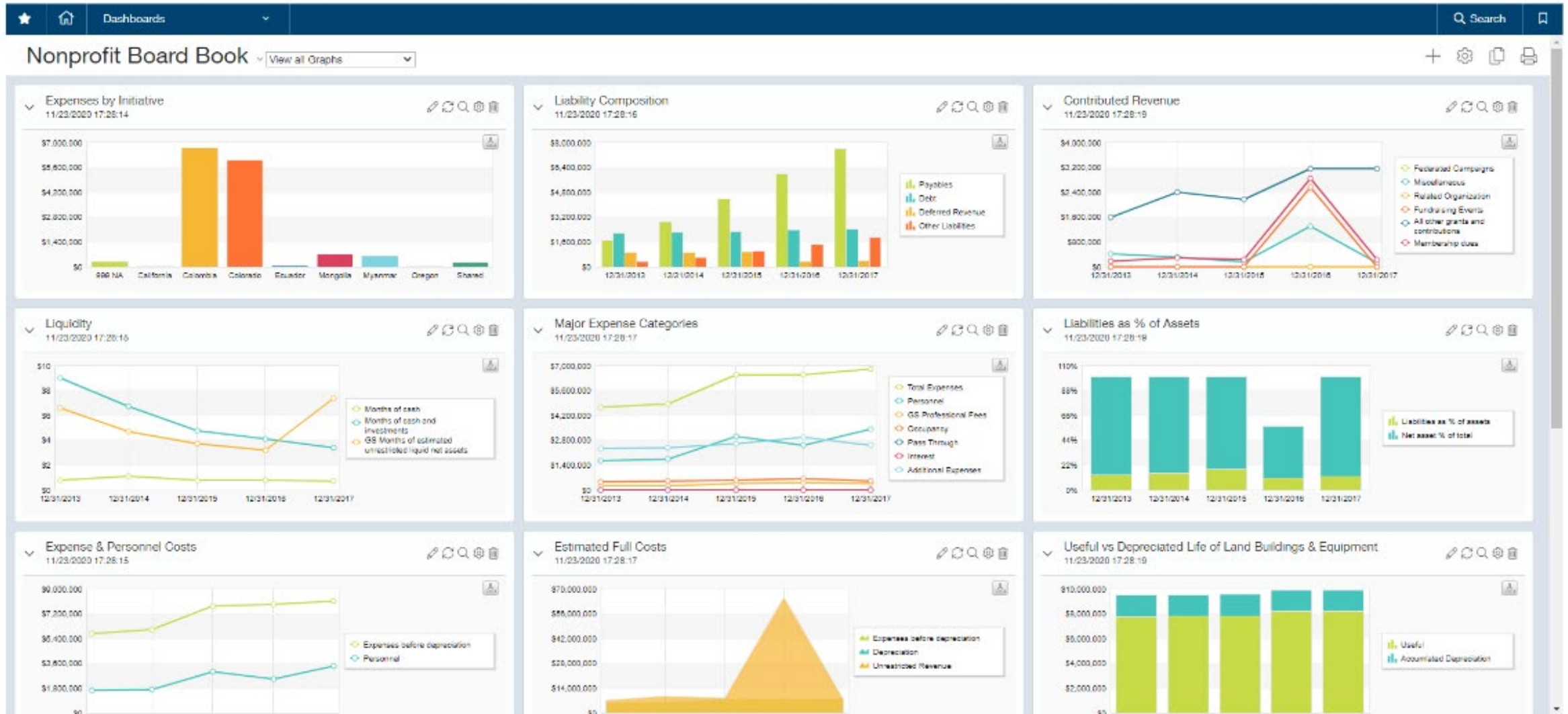
Digital transformation enables you to:

- 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

Dashboards for metrics that matter




Forms and Operational Flows

Eligibility determination

Website Application Request

02/22/2024 11:04 AM



Eligibility Quiz

Is your organization a 501c(3) non profit organization?
 YES NO

Can you provide a valid IRS determination letter?
 YES NO

Has your organization filed a Form 990 with IRS within the last year?
 YES NO

Are your organization's financial statements audited by an independent accountant?
 YES NO

Does your organization provide services in the County?
 YES NO

Has your organization been operating for 3 or more years?
 YES NO

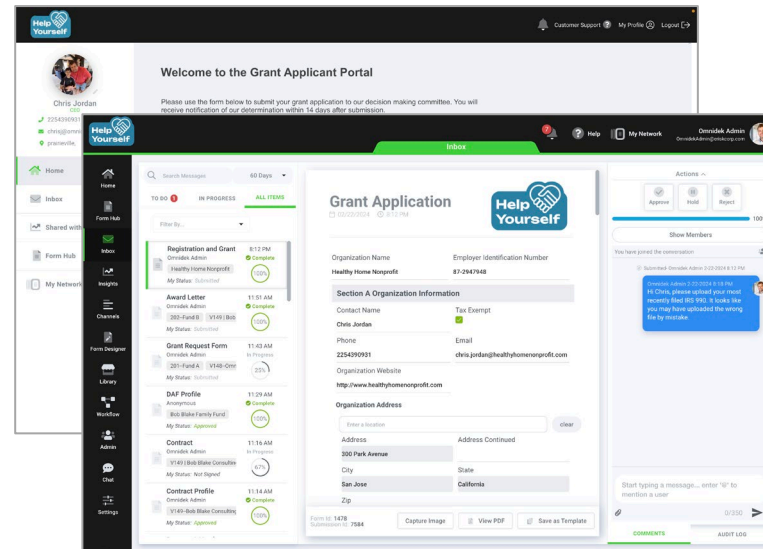
Does the organization's total budgeted revenue for the current year equal or exceed \$1,000,000?
 YES NO

What areas of focus do you serve?
Health & Home

Organization Information

Organization Address	Organization Name
300 Park Ave, Suite 1400	Healthy Home Nonprofit
State	City
California	San Jose
Website Address	Zip
http://healthyhomenfp.com	95110

Application processing



Welcome to the Grant Applicant Portal

Please use the form below to submit your grant application to our decision making committee. You will receive notification of our determination within 14 days after submission.

Grant Application

Organization Name: Healthy Home Nonprofit
Employer Identification Number: 87-2447948

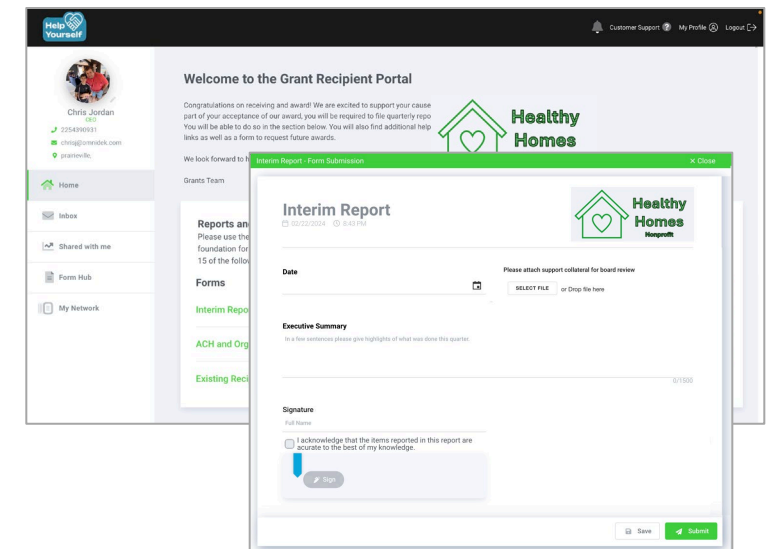
Section A Organization Information

Contact Name: Chris Jordan
Phone: 2254390931
Email: chris.jordan@healthyhomenonprofit.com
Organization Website: http://www.healthyhomenonprofit.com

Organization Address:
300 Park Avenue
San Jose, California
95110

Form ID: 1478 | Submission ID: 7984

Awarded grants management



Welcome to the Grant Recipient Portal

Congratulations on receiving and award! We are excited to support your cause part of your acceptance of our award, you will be required to file quarterly reports. You will be able to do so in the section below. You will also find additional help links as well as a form to request future awards.

We look forward to your report.

Interim Report - Form Submission

Reports and Forms

Please use the foundation for 15 of the following:

- Interim Report
- ACH and Org
- Existing Rec


Date: or Drop file here

Executive Summary: In a few sentences please give highlights of what was done this quarter.

Signature: Full Name

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

Sage Intacct Fundraising powered by DonorPerfect



All Things Are Pawsible

Join countless others in helping give animals a

AR from California gave \$45
2 days ago

\$250

Today Only Monthly

\$65

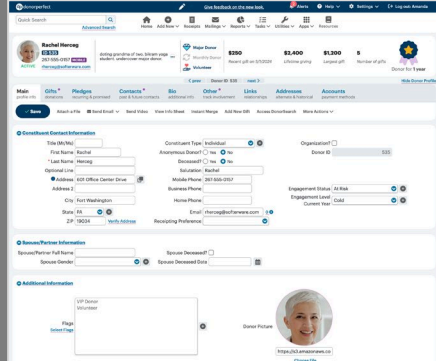
\$145

\$250

\$500

\$1,500

Other



Fundraising financial insights

Contributions

\$241,030

this year to date

+\$166,064 vs. budget

Gifts

55

this year to date

+56 vs. prior year

Average Gift

\$4,382

this year to date

+4,382.57 vs. prior year

Fundraising Pledge Ratio

21

this year to date

+8.6% vs. prior year

Fundraising Expense

\$55,250

this year to date

-\$9,658 vs. budget

Fundraising ROI

4.36

this year to date

+54.06% vs. prior year


Cost per Dollar Raised

\$0.23


this year to date

-34.28% vs. prior year

Contribution Trend



Revenue Analysis Waterfall



Giving by Restriction

	Month Ending 08/31/24 Actual	Month Ending 04/30/24 Actual	Year To Date 05/05/24 Actual	Prior Year To Date 08/09/23 Actual
Contributions	75,000	0	75,000	0
Temporarily Restricted	165,280	0	165,030	135,250
Unrestricted	240,280	0	241,030	135,250

Top Funds by Contributions

Funds	Contributions Year To Date 05/05/24	Gift Count Year To Date 05/05/24	Average Gift Year To Date 05/05/24	Fundraising Expense Year To Date 05/05/24	Contributions Year To Date 05/05/24
Funds	165,030	55	3,019	55,250	
Disaster Relief/Healthy Tomorrows	75,000	0	0	0	
Outreach Campaign	241,030	55	4,382.57	55,250	

Sage Intacct Fundraising

[DonorPerfect](#)

Reconciliation Links

- [*Receipts register](#)
- [*Deposits register](#)
- [*Bank reconciliation](#)

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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.



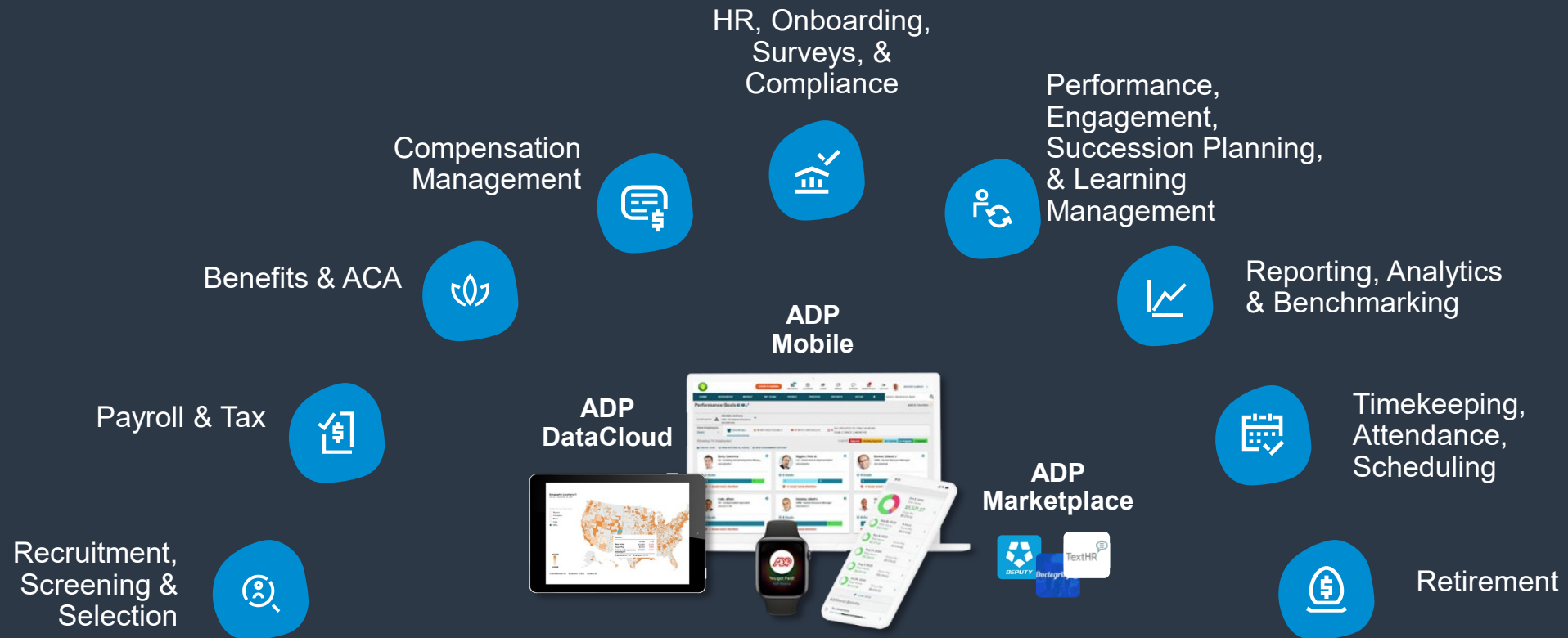
Inbound time: Pulls timesheet data from Sage Intacct Time & Expenses into ADP WFN Time & Attendance.

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SageIntacct Payroll powered by ADP Workforce

More than a product, it's an ecosystem



Workers Compensation

ADP Wage Garnishments

ADP Unemployment Claims

ADP Tax Credits

Wisely by AD

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**

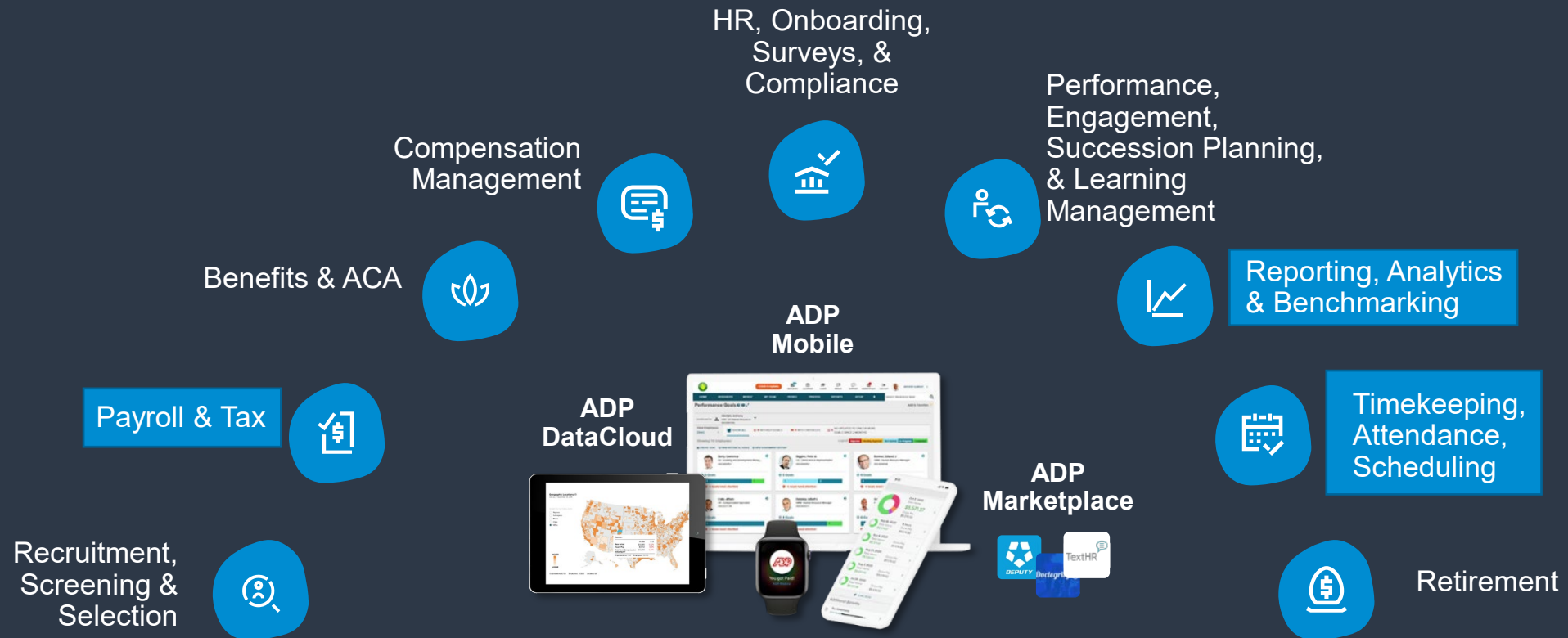
Spreadsheets can't do this...

- 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!

SageIntacct Payroll powered by ADP Workforce

More than a product, it's an ecosystem



Workers Compensation

ADP Wage Garnishments

ADP Unemployment Claims

ADP Tax Credits

Wisely by AD

A group of four business professionals are gathered around a table in a meeting. A man in a suit and glasses is seated at the center, looking at a laptop. A woman in a white blazer stands behind him, gesturing towards the laptop. Another woman is seated to the right, looking at the man. A man is seated on the left, looking towards the center. The scene is brightly lit, possibly from a window in the background. The word "Demo" is overlaid in a large, dark blue font in the center of the image.

Demo



Questions?

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Thank you

For more information, contact:

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