TECHIMPACT®

In partnership with

NPQ

Tech Tools for Going Virtual with your Finance Office

WE'RE A NONPROFIT ON A MISSION TO USE TECHNOLOGY TO BETTER SERVE THE WORLD.

TECHIMPACT®

We do this by delivering tech services, education, and training that help nonprofits and communities thrive.

NONPROFIT TECH SERVICES:

- Managed IT Support
- Cloud Services
- Security & Compliance
- Data Support
- Strategic Consulting
- Machine Learning & AI
- Community Integrated Design

NONPROFIT EDUCATION & TRAINING:

- Reports
- Consumer Guides
- Assessments
- Workbooks & Articles
- Online Training
- Free Webinars

WORKFORCE DEVELOPMENT:

ITWorks & CXWorks: Free IT and Customer Experience training programs

PunchCode: 12-week immersive programming bootcamp

KAREN GRAHAM

Director of Education & Outreach, Tech Impact

Pronouns: She/Her

I lead the Idealware team of researchers, presenters, and writers who create technology information resources designed to help nonprofit leaders put their vision into action.

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ANDREA MILLS

MBA, CPA, CCSA®, CGMA; Principal for Outsourcing, Fiscal Management Associates

Pronouns: she/her

Andrea has extensive experience helping nonprofits, individuals, and foundations make important fiscal decisions. With her support, organizations strengthen the effectiveness of their giving and receiving of contributions, implement powerful fiscal management tools, establish appropriate fiscal policies and procedures, and successfully assess strategic decisions.

ANDY WOLBER

Technology writer

Pronouns: He/Him

Andy (@awolber) is a contributing writer for TechRepublic, and has taught Nonprofit and Government Technology for Grand Valley State University. Prior staff roles include positions with Michigan Nonprofit Association, NPower Michigan, the Dallas Historical Society, and Dallas Black Dance Theatre. He holds an MBA/MA in Arts Administration from Southern Methodist University.

POLL

What best describes your roll in your organization?

- ❑ Head of finance
- ❑ Finance or accounting staff
- ❑ Executive director
- ❑ Consultant or contractor
- ❑ Other

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AGENDA

1. Financial operations
2. Solutions: Core + Store + More
3. Apps vs. Apps + Services

- All attendee lines will remain muted
- Please connect to audio by dialing in (toll) or by using your computer speakers (VoIP Toll Free).
- If you have dialed in by phone select Telephone and enter your audio PIN number in the audio panel
- If you lose audio, please exit out of the presentation and reconnect
- We are recording today's presentation and you will be sent a link to the webinar recording
- Please use the "Q&A" to ask us questions.

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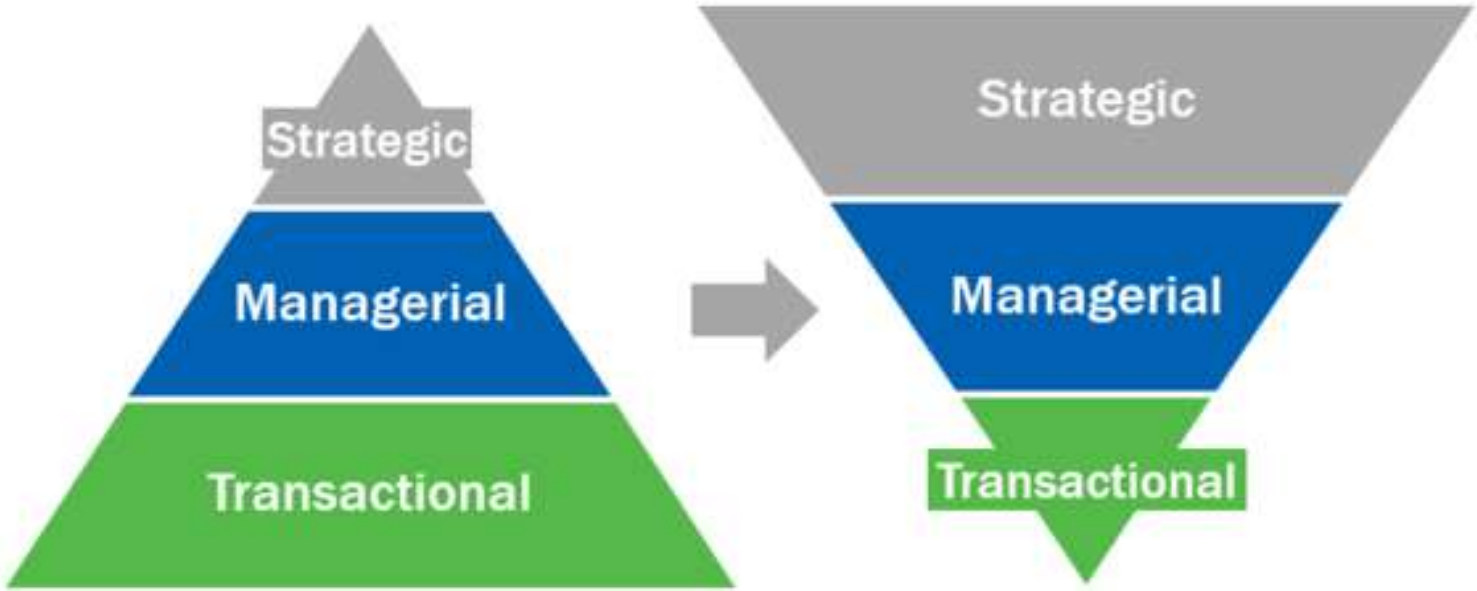
Changing Roles



Adapted from the following sources:
Jeanne Bell and Elizabeth Schaffer, *Financial Leadership for Nonprofit Executives: Guiding Your Organization to Long-term Success* © 2005
Betty Ferreira, "Finance Digital Transformation for Not-for-Profits," ReStructure Consulting

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PRIORITIZE THE PAIN POINT

What causes the most (accounting or financial management) pain?

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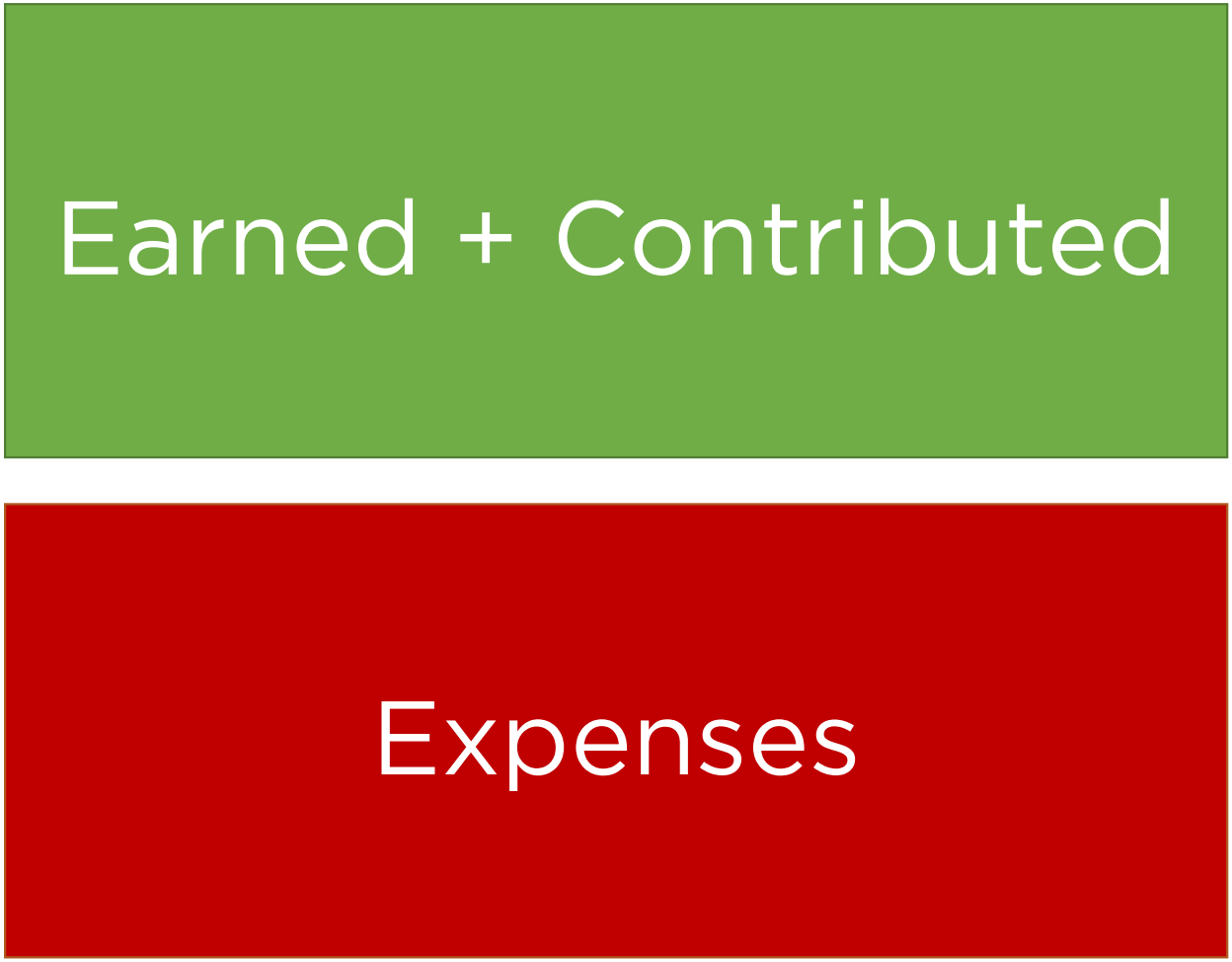
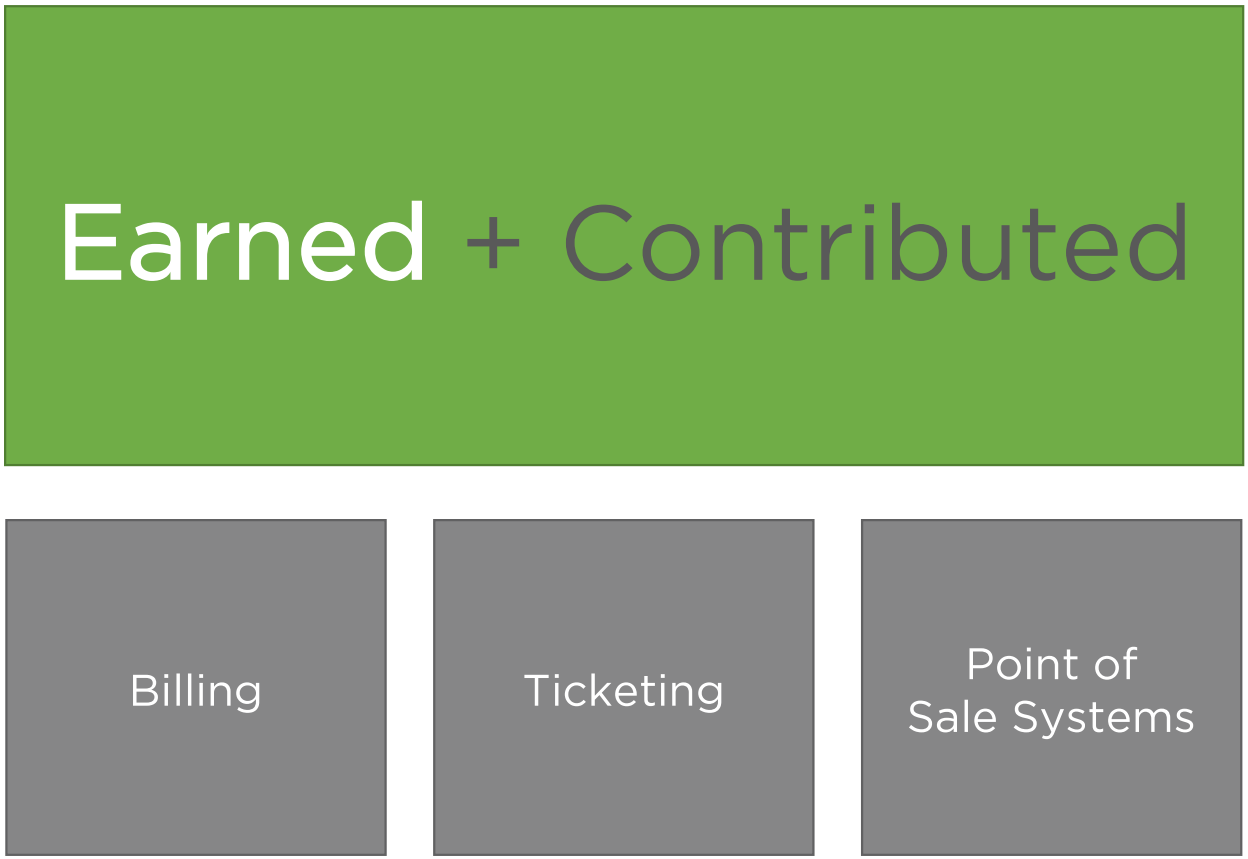
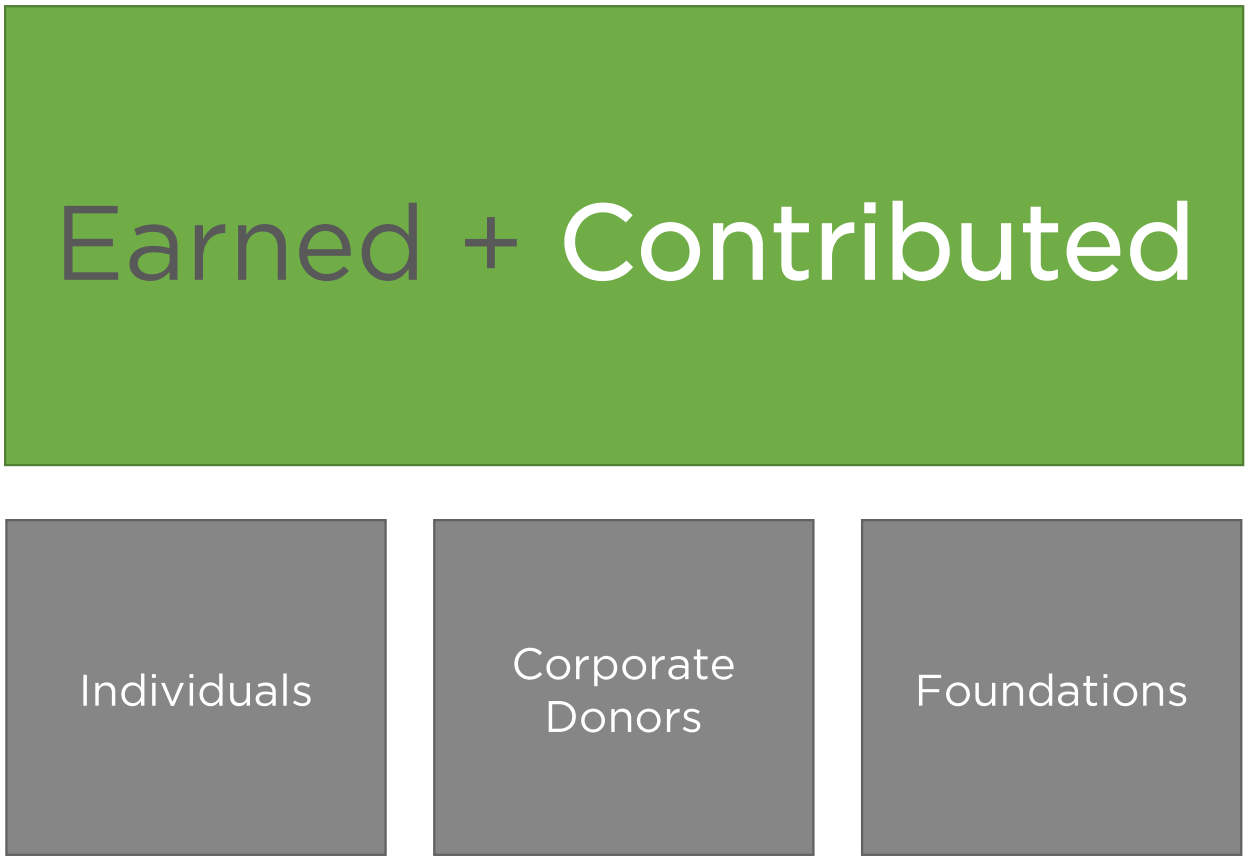
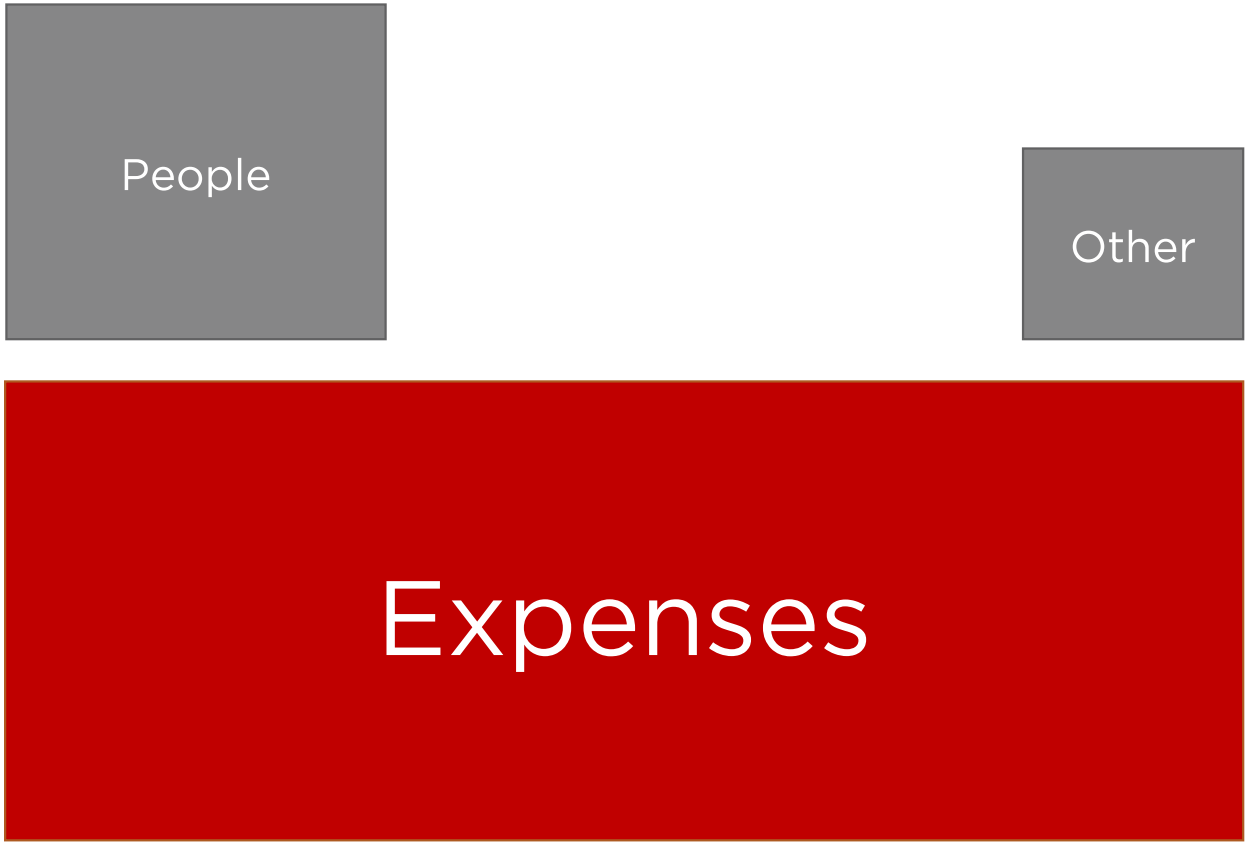
Revenue
Expenses


Earned + Contributed
Expenses

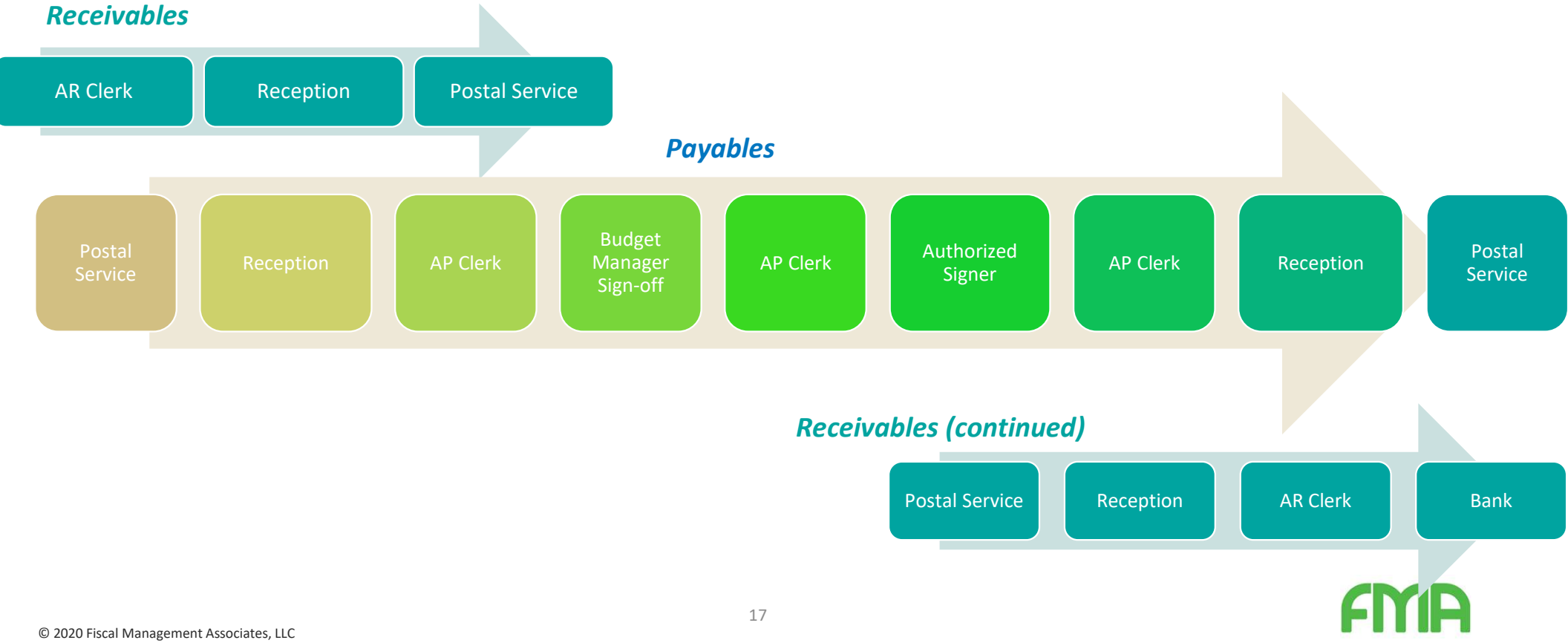

Earned + Contributed
Billing
Ticketing
Point of
Sale Systems


Earned + Contributed
Individuals
Corporate Donors
Foundations


People
Other
Expenses

PRE-PAPERLESS WORKFLOW

How many hands touch a single invoice?



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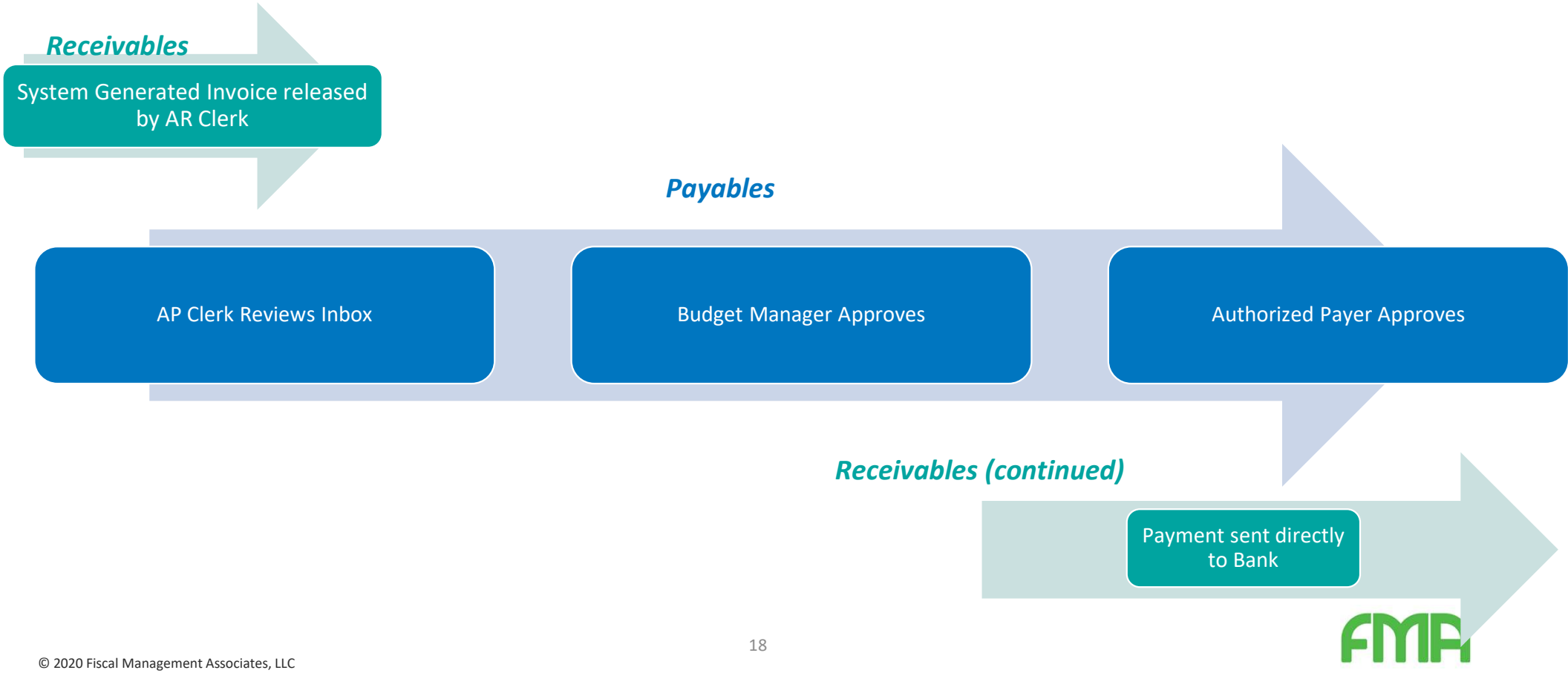
FINANCIAL AUTOMATION



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POLL

What is keeping you from fully automating?

- ❑ Perceived Cost
- ❑ Leadership Inertia
- ❑ Perceived Effort
- ❑ Security Concerns
- ❑ Control Concerns
- ❑ Staff Resistance, Readiness

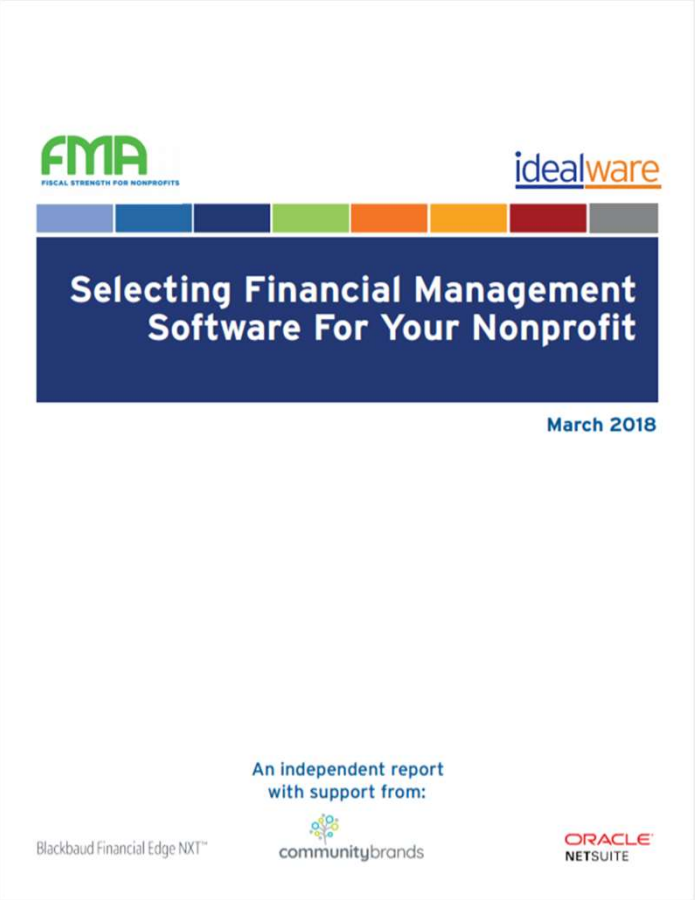
CORE ACCOUNTING SYSTEM

SELECTING FINANCIAL MANAGEMENT SOFTWARE FOR YOUR NONPROFIT

1. Define the team
2. Identify your needs
3. Consider workflows
4. Identify potential solutions
5. List your concerns
6. Ask questions
7. Choose a solution
8. Plan the transition

Download the free guide at

https://offers.techimpact.org/reports/nptechpolicyworkbook/



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ACCOUNTING APPS

QuickBooks

Abila MIP Fund Accounting

AccuFund

Aplos

Araize FastFund Accounting

Denali Fund

Financial Edge NXT (Blackbaud)

FinancialForce

FundE-Z

Microsoft Dynamics 365 Business Central

Oracle NetSuite

Sage Intacct

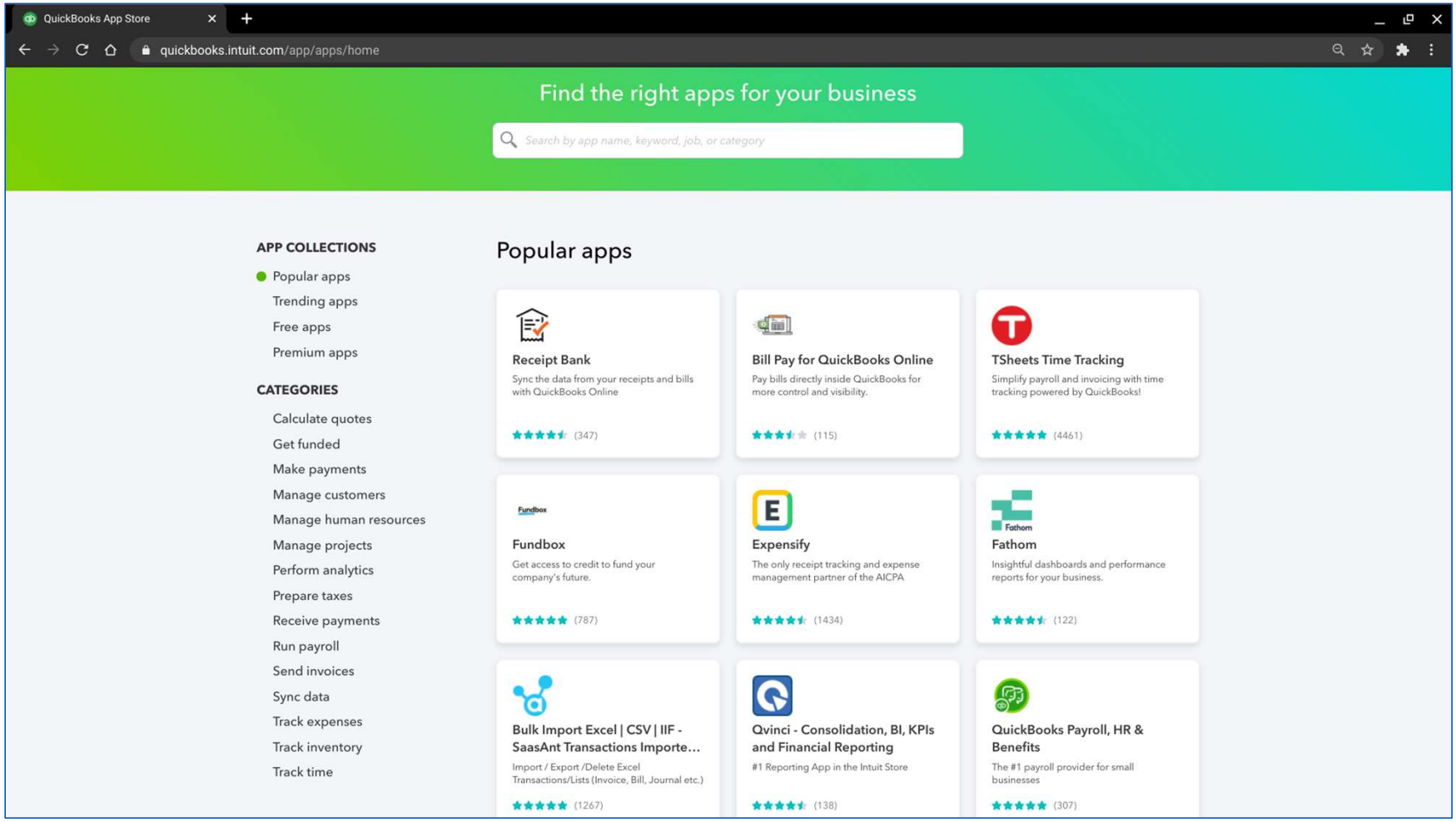
Xero

Zoho Books

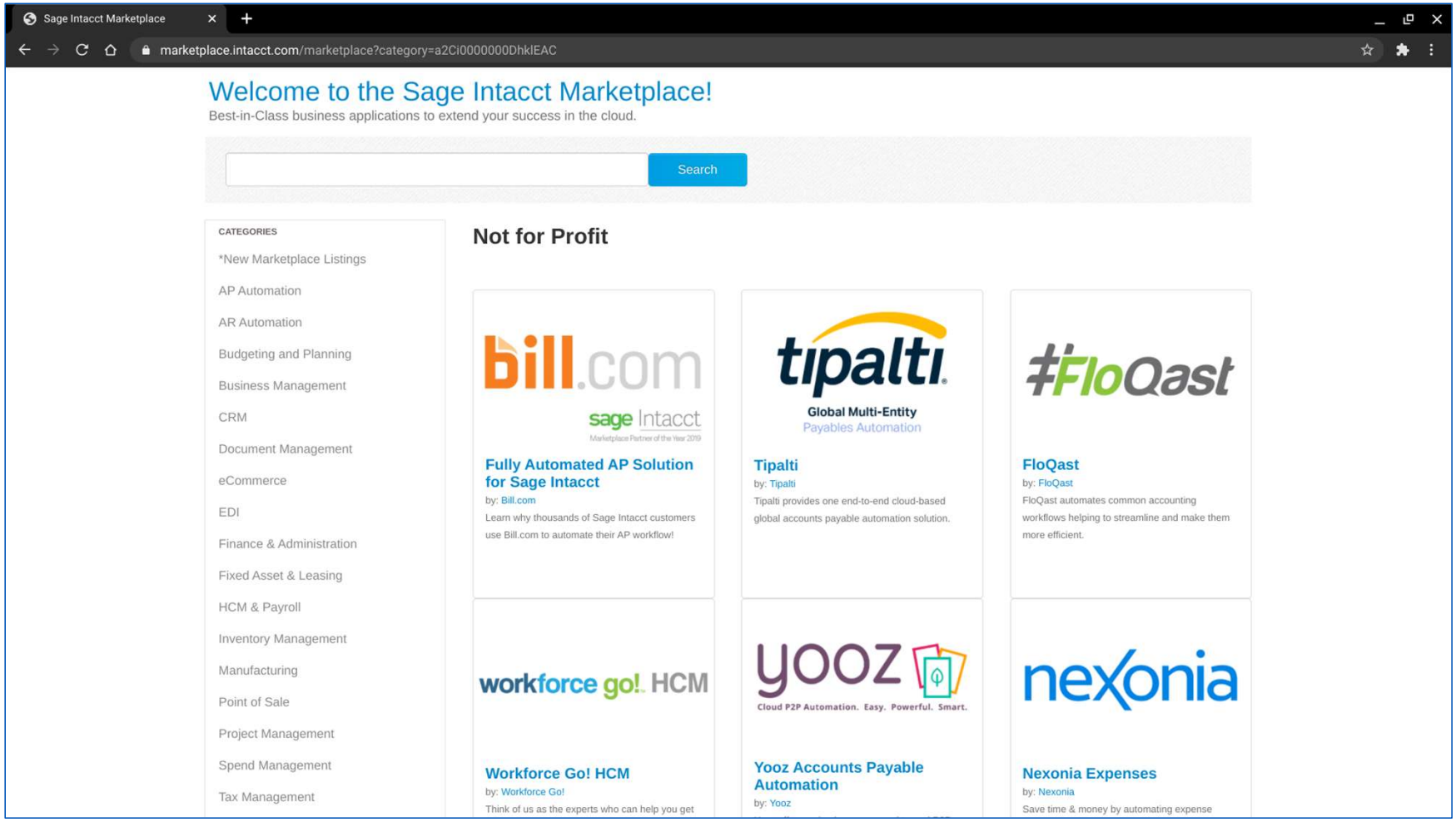
ON-SITE

CLOUD

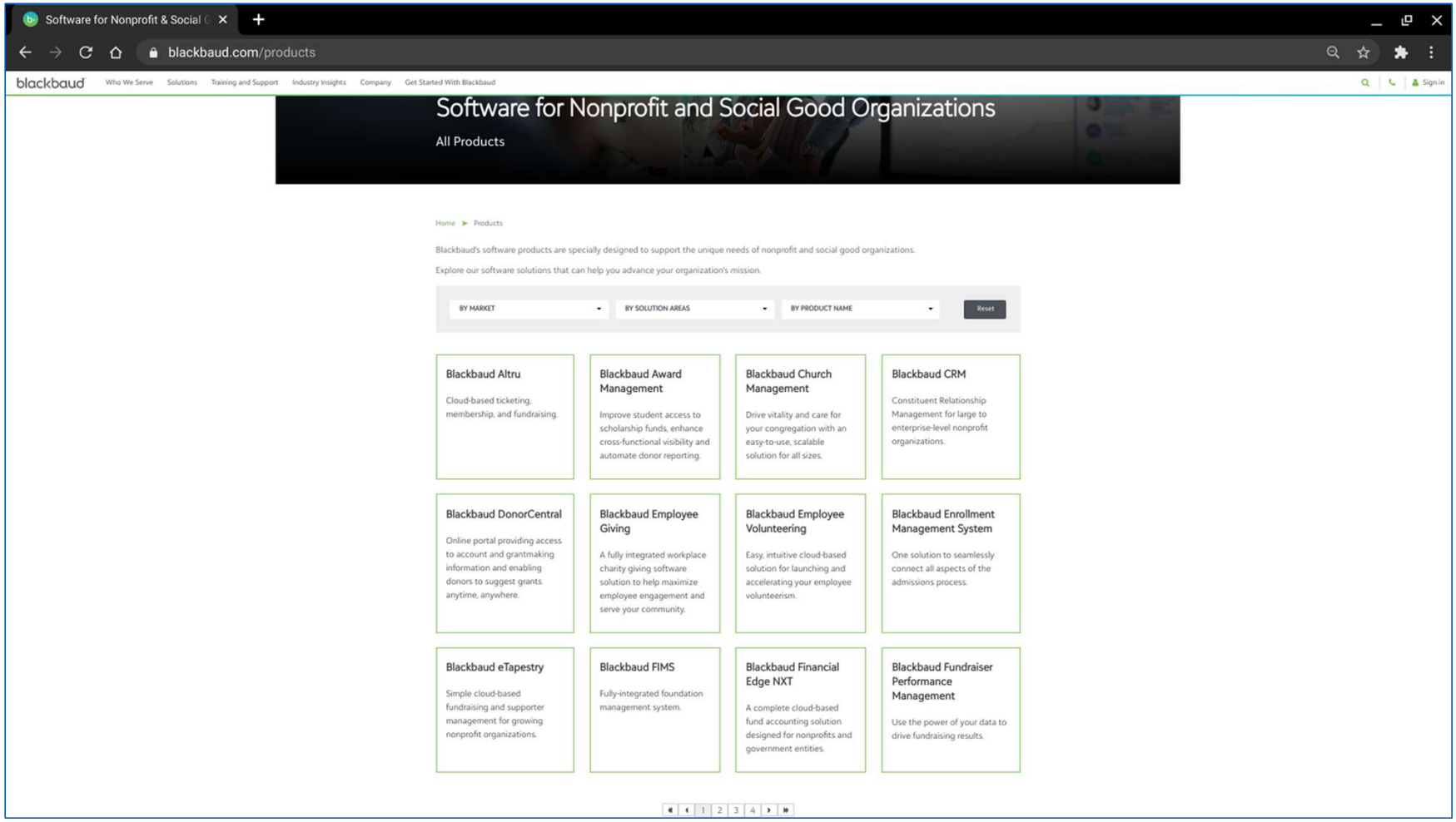
ACCOUNTING VENDOR'S STORE


QuickBooks App Store
quickbooks.intuit.com/app/apps/home
Find the right apps for your business
Search by app name, keyword, job, or category
APP COLLECTIONS
Popular apps
Trending apps
Free apps
Premium apps
CATEGORIES
Calculate quotes
Get funded
Make payments
Manage customers
Manage human resources
Manage projects
Perform analytics
Prepare taxes
Receive payments
Run payroll
Send invoices
Sync data
Track expenses
Track inventory
Track time
Popular apps
Receipt Bank
Sync the data from your receipts and bills with QuickBooks Online
(347)
Bill Pay for QuickBooks Online
Pay bills directly inside QuickBooks for more control and visibility.
(115)
TSheets Time Tracking
Simplify payroll and invoicing with time tracking powered by QuickBooks!
(4461)
Fundbox
Get access to credit to fund your company's future.
(787)
Expensify
The only receipt tracking and expense management partner of the AICPA
(1434)
Fathom
Insightful dashboards and performance reports for your business.
(122)
Bulk Import Excel | CSV | IIF - SaasAnt Transactions Importe...
Import / Export /Delete Excel Transactions/Lists (Invoice, Bill, Journal etc.)
(1267)
Qvinci - Consolidation, BI, KPIs and Financial Reporting
#1 Reporting App in the Intuit Store
(138)
QuickBooks Payroll, HR & Benefits
The #1 payroll provider for small businesses
(307)

[QuickBooks]



[Sage Intacct]


Software for Nonprofit & Social
blackbaud.com/products
blackbaud
Who We Serve
Solutions
Training and Support
Industry Insights
Company
Get Started With Blackbaud
Sign in
Software for Nonprofit and Social Good Organizations
All Products
Home
Products
Blackbaud's software products are specially designed to support the unique needs of nonprofit and social good organizations.
Explore our software solutions that can help you advance your organization's mission.
BY MARKET
BY SOLUTION AREAS
BY PRODUCT NAME
Reset
Blackbaud Altru
Cloud-based ticketing, membership, and fundraising.
Blackbaud Award Management
Improve student access to scholarship funds, enhance cross-functional visibility and automate donor reporting.
Blackbaud Church Management
Drive vitality and care for your congregation with an easy-to-use, scalable solution for all sizes.
Blackbaud CRM
Constituent Relationship Management for large to enterprise-level nonprofit organizations.
Blackbaud DonorCentral
Online portal providing access to account and grantmaking information and enabling donors to suggest grants anytime, anywhere.
Blackbaud Employee Giving
A fully integrated workplace charity giving software solution to help maximize employee engagement and serve your community.
Blackbaud Employee Volunteering
Easy, intuitive cloud-based solution for launching and accelerating your employee volunteerism.
Blackbaud Enrollment Management System
One solution to seamlessly connect all aspects of the admissions process.
Blackbaud eTapestry
Simple cloud-based fundraising and supporter management for growing nonprofit organizations.
Blackbaud FIMS
Fully-integrated foundation management system.
Blackbaud Financial Edge NXT
A complete cloud-based fund accounting solution designed for nonprofits and government entities.
Blackbaud Fundraiser Performance Management
Use the power of your data to drive fundraising results.
1
2
3
4

[BlackBaud]

Strength of Integration?

TRUST

Public dashboard status?
Certifications?

SECURITY

Single Sign On?
Multi-factor authentication?
Audits?

THIRD-PARTY APPS

THIRD-PARTY APPS

Payroll:

ADP

PayChex
(example: MNA)

Other examples:

Bill.com

Expensify

Square

Stripe

TechSoup.org:

ADP

ClickTime

DocuSign

Paya

PayAnywhere

POLL

What category of app are you most interested in exploring?

- Payroll
- Bill pay
- Expenses
- Billing
- Time tracking
- Other

POLL

What category of app are you most interested in exploring?

- ❑ Payroll
- ❑ Bill Pay
- ❑ Expenses
- ❑ Billing
- ❑ Time Tracking
- ❑ Budgeting
- ❑ Grants Management
- ❑ Data Visualization
- ❑ Other

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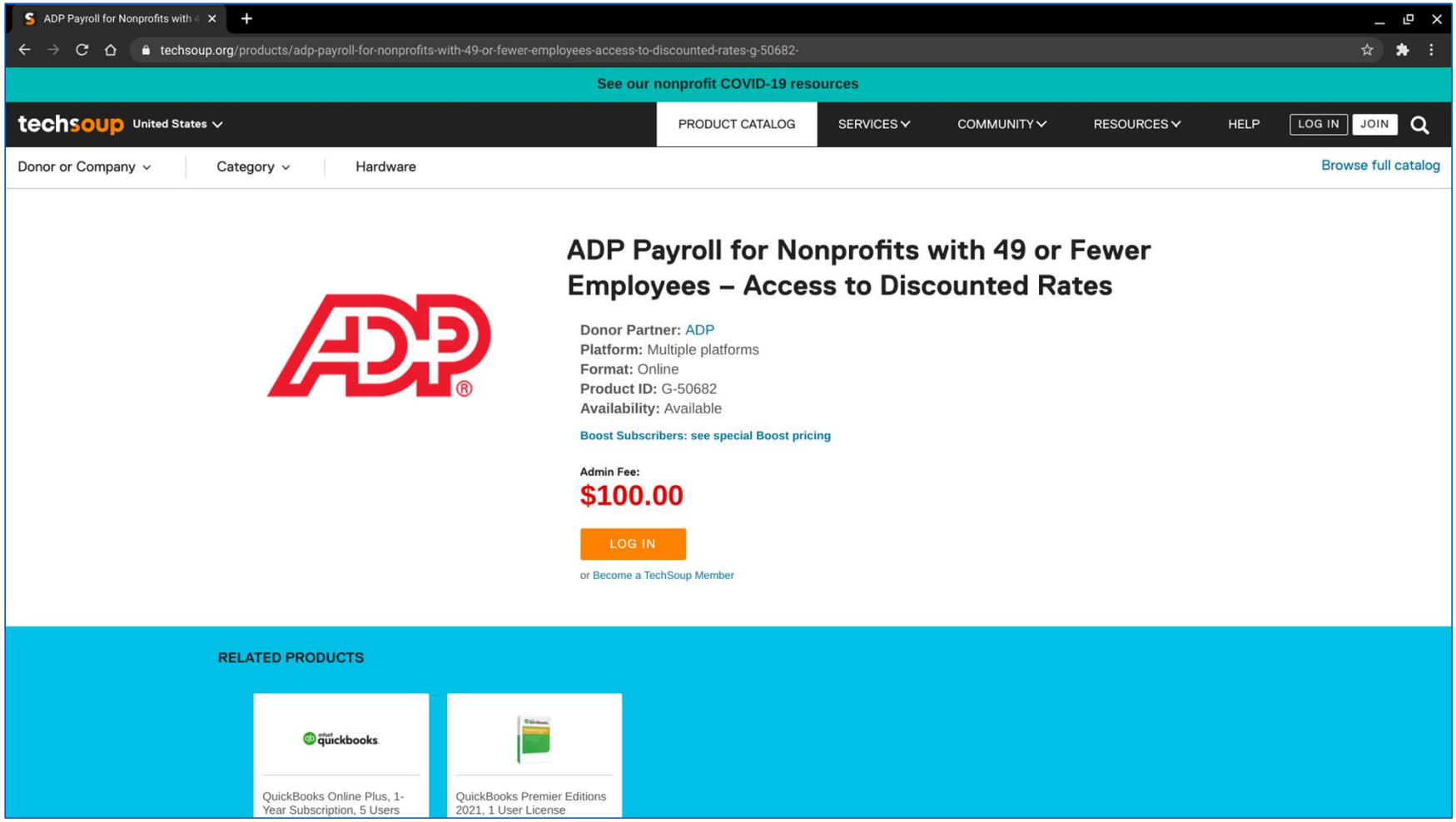
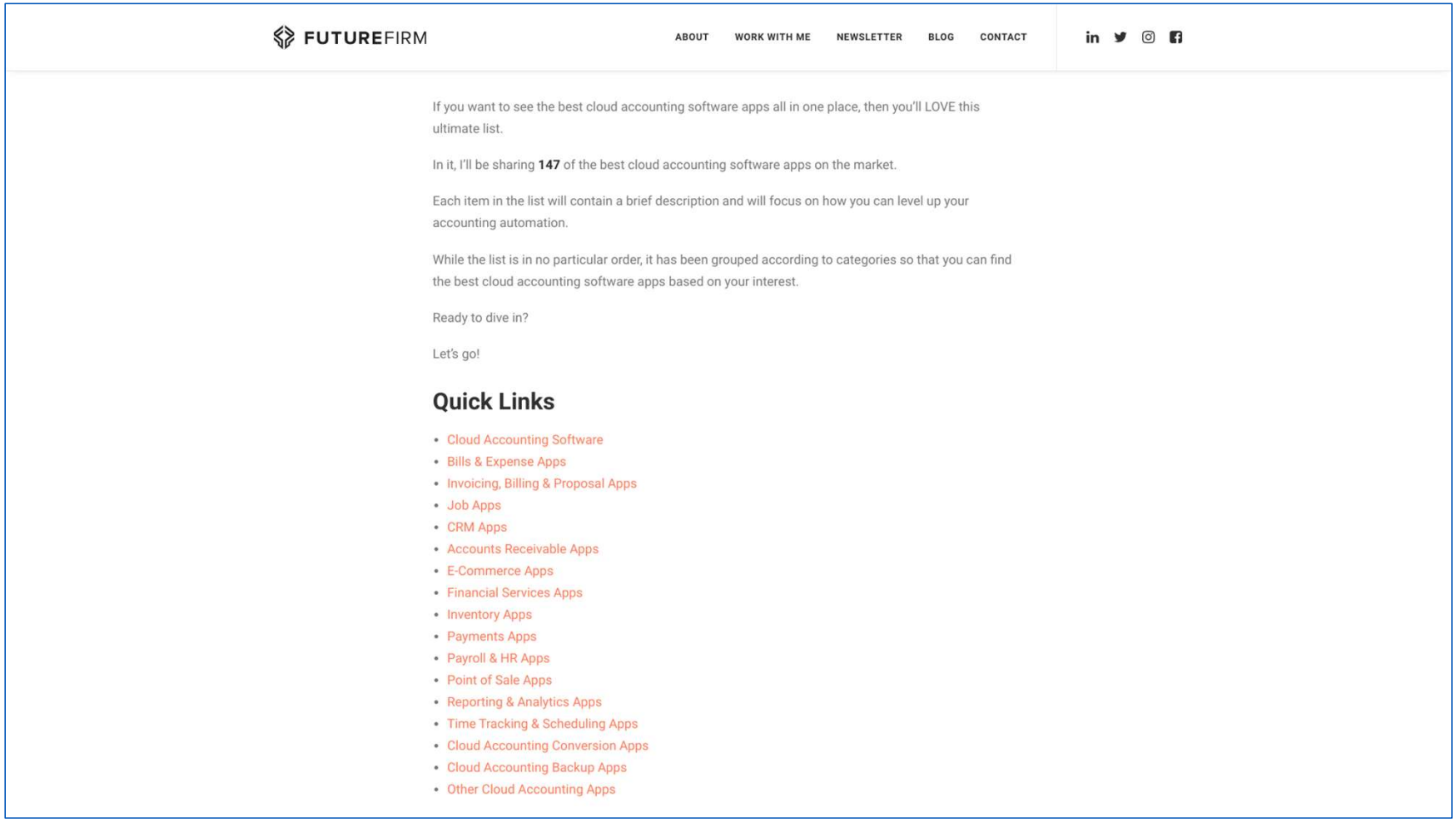


[ADP at TechSoup.org]



[Cloud accounting list by FutureFirm]

EXPORT/
IMPORT

API

Application programming interface

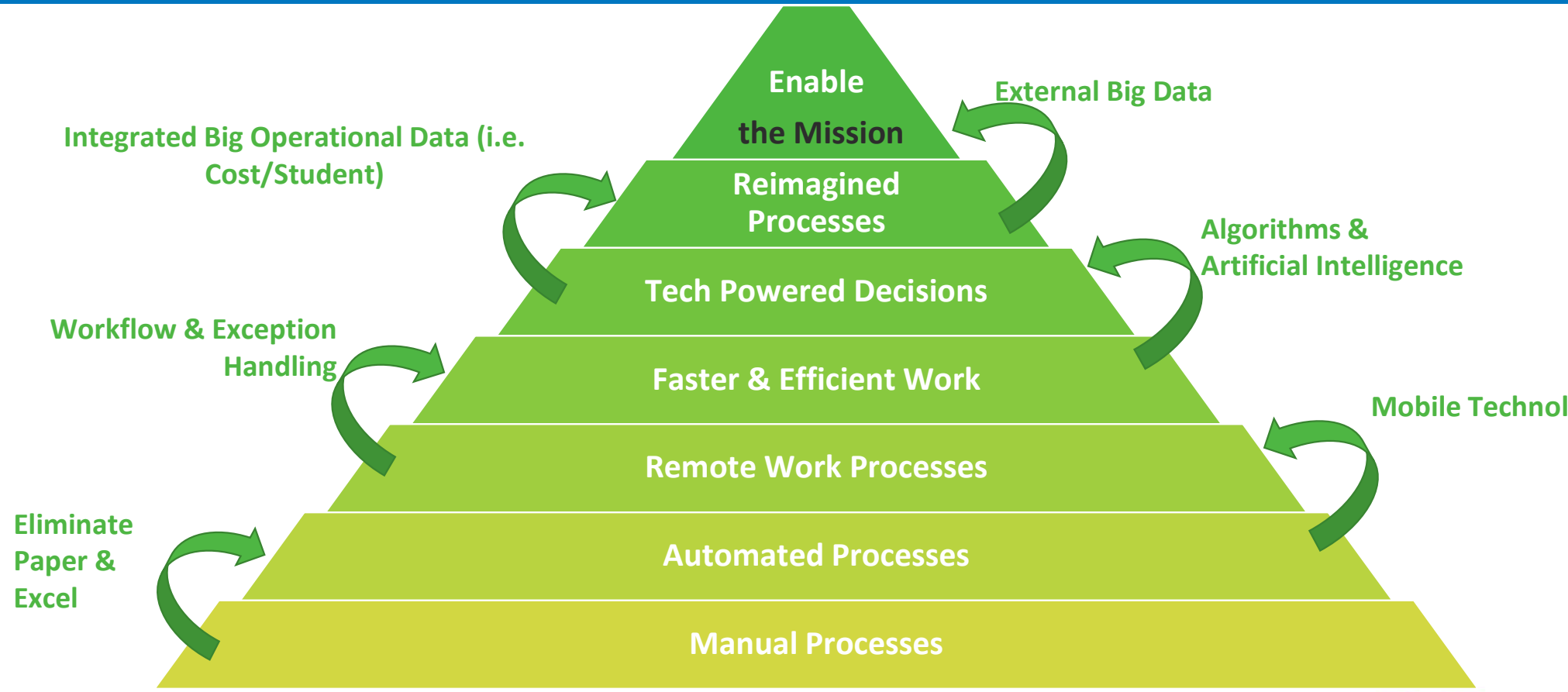
APP OR SERVICE?

People
Cap Ex
Op Ex

Finance/
Accounting-
As-A-Service

PANEL DISCUSSION

EVOLUTION OF FINANCE



Adapted from TechVentive in "The 'Digital' Finance Future: Business as Unusual by Brian Sommer. August 6, 2020

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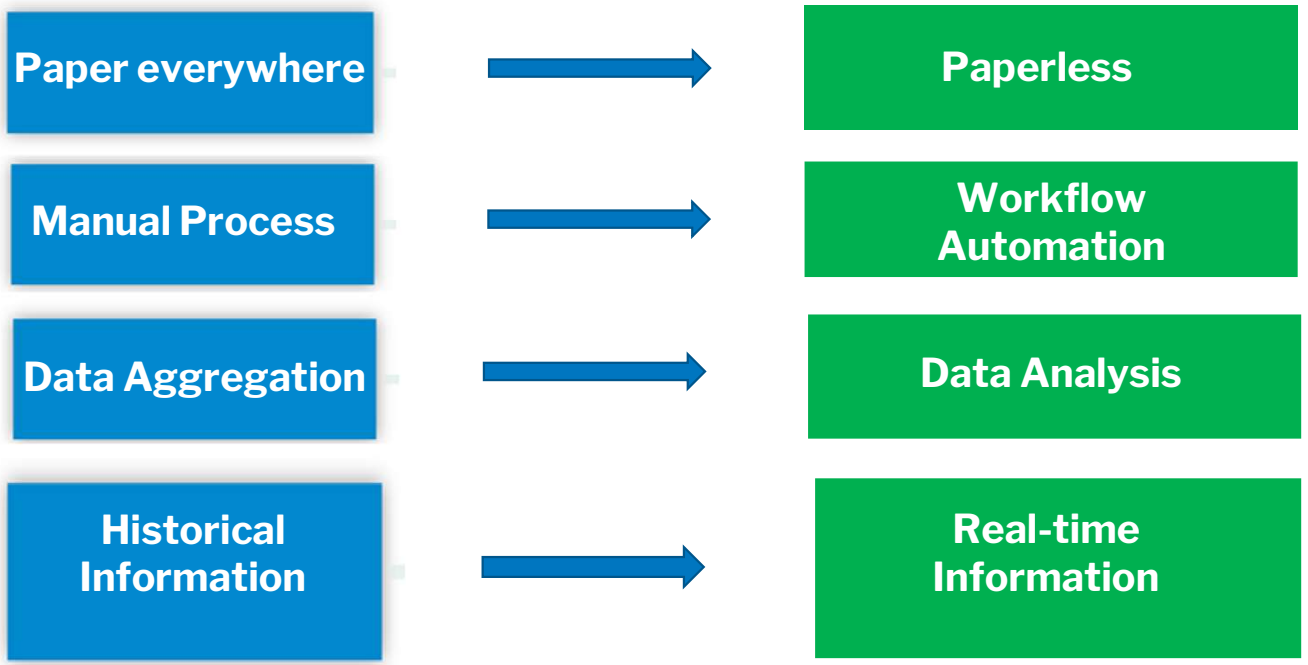
NOW V FUTURE



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- Please complete your pop-up evaluation, coming now!

THANK YOU

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Andy Wolber: andy@wolberworks.com or @awolber

ACKNOWLEDGEMENTS

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Andrea Mills

Andy Wolber

Jeanne Bell

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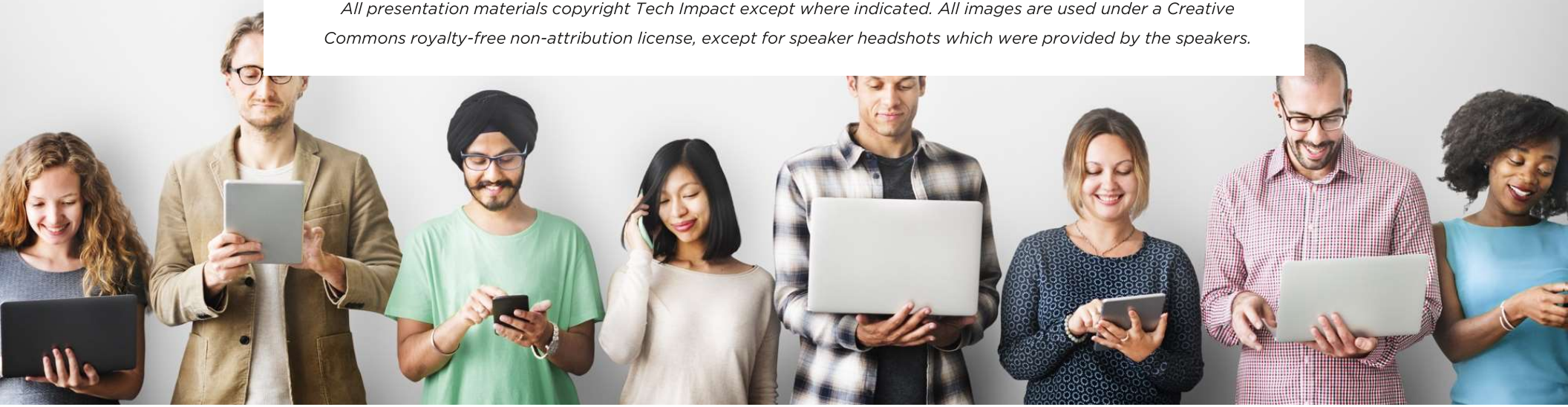

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