

Organizational & operational planning

Unit4 Nonprofit Model capability overview

In today's rapidly evolving nonprofit landscape, effective organizational and operational planning is crucial for enhancing productivity, increasing transparency, and achieving mission success. Unit4's nonprofit model for organizational and operational planning combines our integrated ERP, HCM, Source to Pay, and FP&A software solutions that have been tailored to help nonprofit organizations navigate uncertainty with agility and focus more on what matters: making a positive impact in the world.



Key features

ERP

- **Financial Management** - Track and manage budget allocations, fund utilization, awards, and grants effectively.
- **Donor Management** - Maintain a 360-degree view of donor interactions, contributions, and engagement.
- **Fundraising Analytics** - Evaluate fundraising campaigns and donor trends for strategic planning and future activities.

HCM

- **Employee Data** - Centralize employee data, including roles, skills, and performance management.
- **Time & Attendance** - Monitor attendance, leave requests, and workforce scheduling.
- **Training & Development** - Plan and track employee training to enhance skillsets and organizational capacity.

Source to Pay

- **Supplier Management** - Maintain a database of suppliers, contracts, and sustainable and accredited performance evaluations.
- **Purchase Orders** - Streamline the procurement process from requisition through to approval and delivery.
- **Inventory Control** - Optimize inventory levels and reduce waste through more efficient tracking.

FP&A

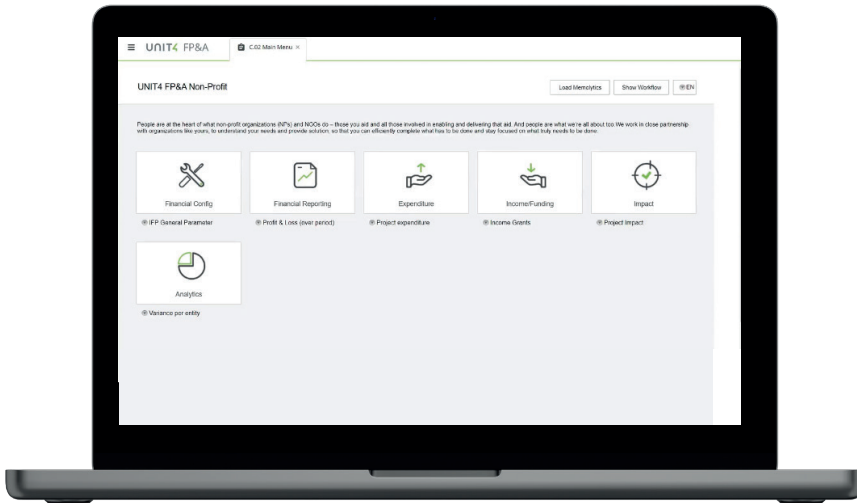
- **Budgeting & Forecasting** - Develop accurate budgets, forecast financial trends, plan scenarios, and assess variance analysis.
- **Performance Metrics** - Track KPIs and financial indicators for informed decision-making and support, with enhanced dashboards and analytics.
- **Grant Financial Management** - Monitor grant utilization and compliance with transparency to ensure funds are utilized effectively.

Helping Nonprofits deliver on their mission

By adopting Unit4's ERP, HCM, FP&A, and Procurement software suite, your nonprofit organization can optimize operations, enhance financial management, and drive greater mission impact. Empower your nonprofit to focus on creating lasting change in the global communities you serve.

1.1. Organizational planning

Includes multi-year planning capability from an income and expenditure perspective.



Model and report income from – grants, sponsorships, donations, and local income

Allocate funding to projects.

View project expenditure, including – personnel, procurement, travel, sub-awarding, and administration.

Track overhead expenditure – personnel, fundraising, and administration.

Project impact monitoring.

Analytics & reporting – including income statement and balance statement.

All fully integrated into the ERP Nonprofit data model.

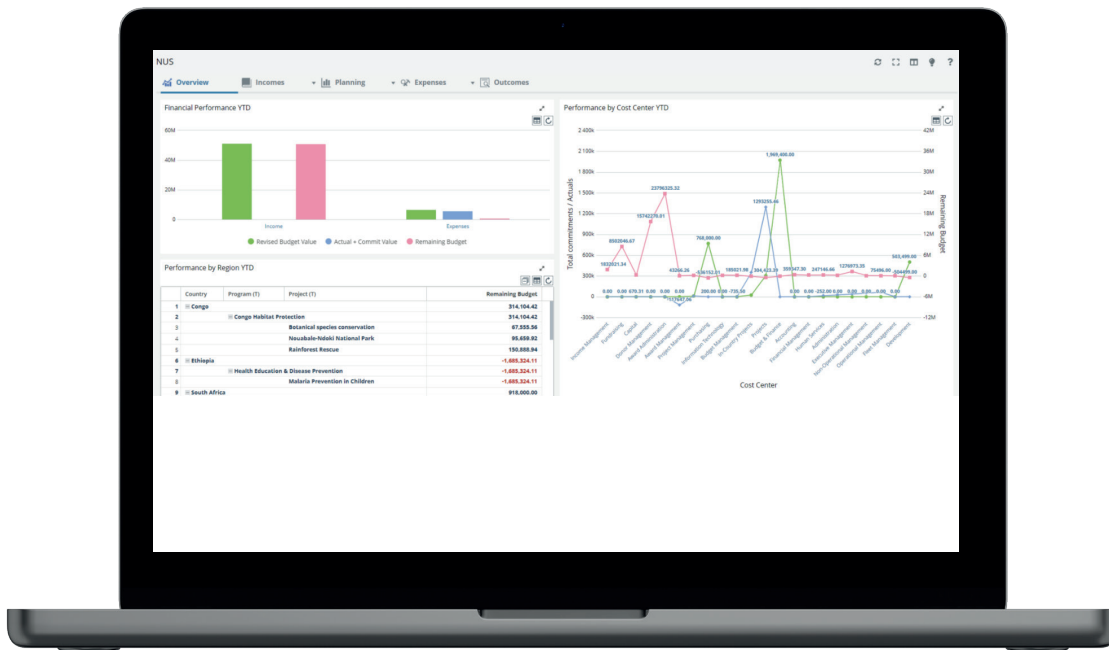
All master data from projects, donors, awards, and accounts is synchronized.

Benefits

- **Productivity** - Streamline operations by eliminating duplicate data entry, reducing manual processes, and automating workflows. Free up time for more value-add activities.
- **Transparency** - Ensure accountability and greater transparency in financial reporting, procurement, and employee management.
- **Strategic Insights** - Gain near real-time visibility into organizational performance, enabling more data-driven decision-making.
- **Cost Optimization** - Manage budgets effectively, reduce procurement costs, and allocate resources efficiently.
- **Compliance** - Maintain compliance with donor requirements, industry regulations, and internal policies.



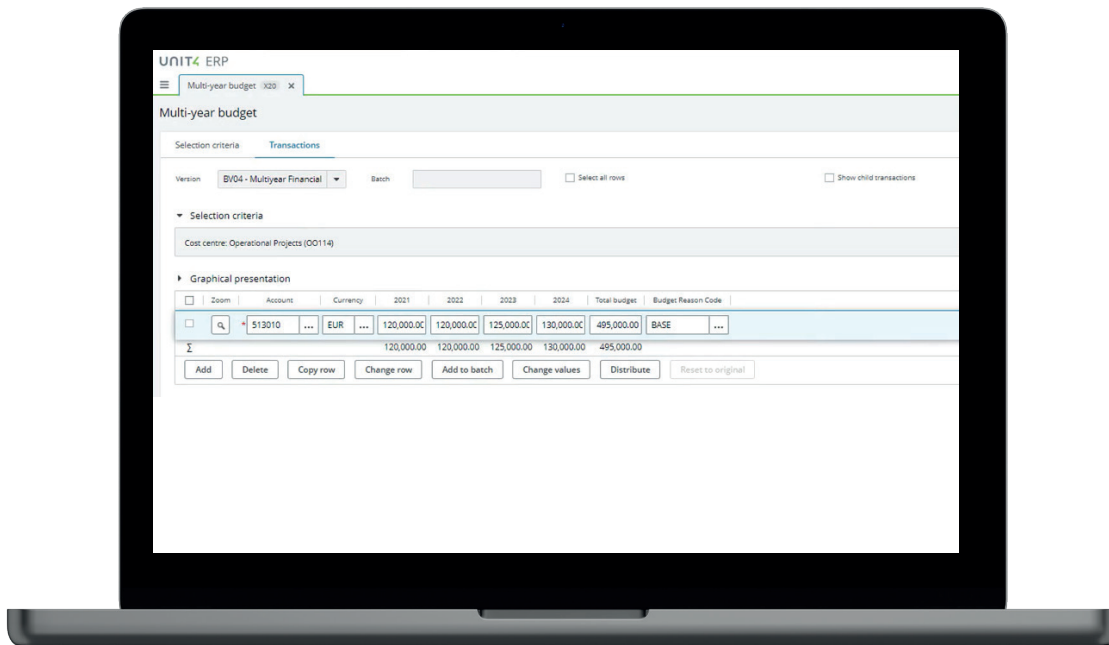
1.2. Global nonprofit organizational overview



View versions of budgets by cost center or department.

View reasons for transactions being recorded using budget reason codes.

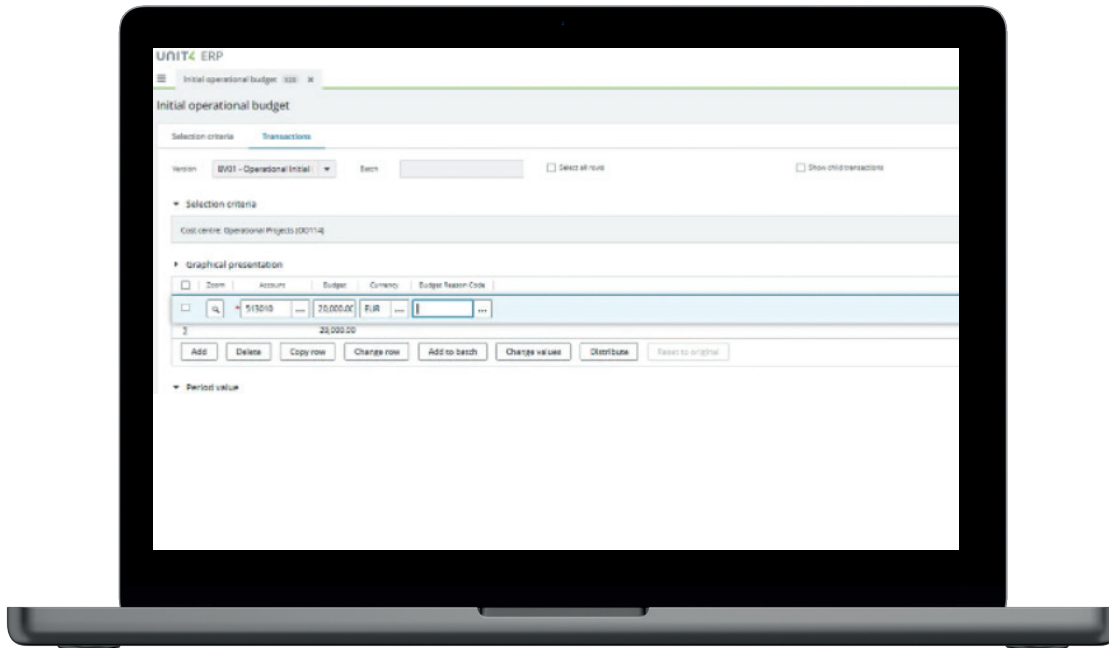
1.3. Multi-year budgeting



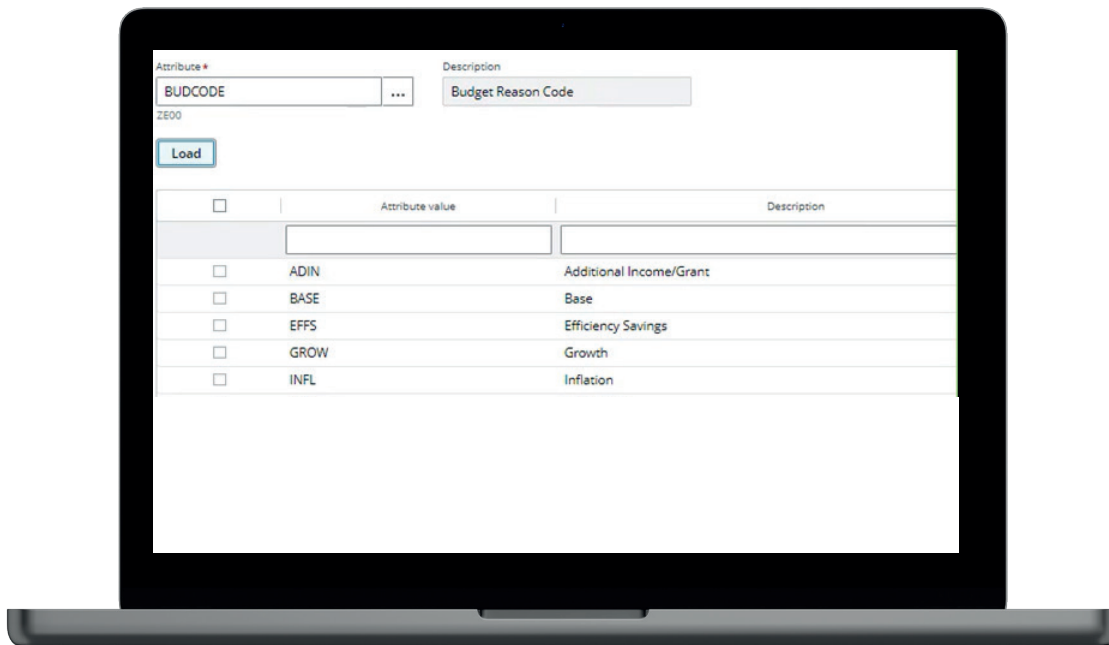
Cost center and account level budgeting.

Define currencies and the number of years to budget over as required. Budget reason codes support defining the rationale for changes.

1.4. Operational budgeting



Set versions of budgets by cost center or department. Set initial or revised budgets using the copy version function to move between.



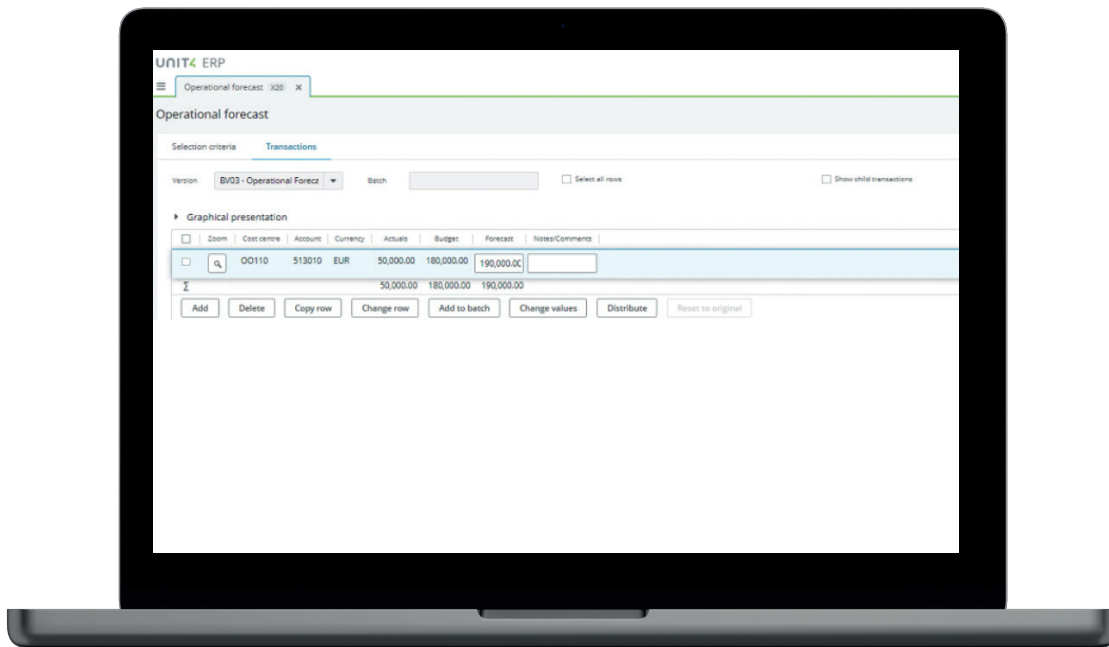
Define reasons for transactions being recorded using budget reason codes.

“The Unit4 Non-profit Model framework is delivered with prebuilt processes. With seamless integration between modules and a first-class user experience, Unit4 is the gold standard for non-profit ERP. Unit4 enables and activates best practices for the way we work most efficiently and seamlessly. It’s now much easier to see and access data in real-time. Users are more engaged, active, and able to leverage the system.”

Farah Abbas

Director of Technology and Information Management Systems, Oxfam America

1.5. Operational forecasting



Utilize operational budget and/or actuals to plan for the future.

Why Unit4?

Unit4’s solutions for finance, projects, and HR help nonprofits maximize resources, reduce costs, and increase accountability, enabling greater focus on what really matters - delivering more impact. Our intuitive and flexible cloud-based platform empowers nonprofits to transform their mission by helping their people to plan strategically for the future while working smarter. The suite transforms a nonprofit’s capability to manage programs, grants and funding, and the people who make it all happen.