

Focus on Nonprofits & Education

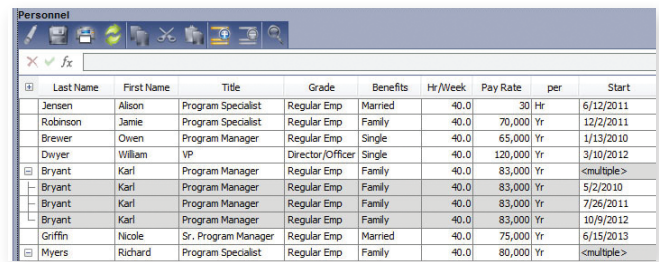
Adaptive Insights provides nonprofit organizations and educational institutions with a Corporate Performance Management system that enables them to plan for, consolidate, and report on complex organizations, with multi-dimensional driver-based modeling capabilities, and integrated P&L and cash flow planning and reporting.

Planning & Reporting Challenges

Nonprofit organizations and educational institutions require strict fiscal management. Their budgets must be accurate to ensure that they operate within their means. Their organizations can be complex, involving multiple funds (restricted and unrestricted), programs, and locations. They often have detailed allocation schemes to load funds or programs with costs from overhead locations.

These organizations' boards often require a budget prior to approving the use of resources. And third-party stakeholders may require a formal budget before considering grant applications, making pledges or donations, or extending credit. Nonprofit organizations must be able to count on what they are presenting to their board and to the public being accurate and reliable.

In addition, it is critical for nonprofits and educational institutions to plan cash flow, to ensure that they have the cash they need, when they need it. Projecting cash flow is



Last Name	First Name	Title	Grade	Benefits	Hr/Week	Pay Rate	per	Start
Jensen	Alison	Program Specialist	Regular Emp	Married	40.0	30	Hr	6/12/2011
Robinson	Jamie	Program Specialist	Regular Emp	Family	40.0	70,000	Yr	12/2/2011
Brewer	Owen	Program Manager	Regular Emp	Single	40.0	65,000	Yr	1/13/2010
Dwyer	William	VP	Director/Officer	Single	40.0	120,000	Yr	3/10/2012
Bryant	Karl	Program Manager	Regular Emp	Family	40.0	83,000	Yr	<multiple>
Bryant	Karl	Program Manager	Regular Emp	Family	40.0	83,000	Yr	5/2/2010
Bryant	Karl	Program Manager	Regular Emp	Family	40.0	83,000	Yr	7/26/2011
Bryant	Karl	Program Manager	Regular Emp	Family	40.0	83,000	Yr	10/9/2012
Griffin	Nicole	Sr. Program Manager	Regular Emp	Married	40.0	75,000	Yr	6/15/2013
Myers	Richard	Program Specialist	Regular Emp	Family	40.0	80,000	Yr	<multiple>

Personnel Planning Sheet for Nonprofits & Educational Institutions

challenging, especially for organizations which by design react to unpredictable factors such as natural disasters. Cash flow for these organizations can also be uneven as a result of membership or pledge drives, or other fundraising events.

Spreadsheet-based systems are inefficient, error-prone, and fundamentally unsuited for the complex, dynamic planning and reporting required by nonprofit organizations and educational institutions.

“With Adaptive Planning, we’ve dramatically improved our decision making capabilities. We can now make quick adjustments to branch forecasts and analyze scenarios that enable us to see the potential impact of tactical and strategic actions across the total association.”

George DiFlavis
CFO, Valley of the Sun YMCA

The Adaptive Insights Solution

Financial planning and analysis in the nonprofit and education environment requires a flexible budgeting, forecasting, and reporting solution with the ability to:

- Accurately plan revenues and expenses across a complex organization with a large number of dimensions
- Integrate P&L and cash flow planning, to ensure accurate cash projections
- Incorporate contingency planning or what-if scenarios

Adaptive successfully helped more than 100 nonprofit and education organizations streamline their planning and analysis.

- Plan for and consolidate complex organizations, including multiple funds and programs
- Perform detailed staff planning and report on fully loaded costs by employee
- Allocate headcount and overhead to funds, programs, locations, etc.
- Model integrated P&L, balance sheet, and cash flow statements
- Enable cross-fund and cross-department reporting
- Use dashboards to analyze key business drivers
- Use reports to perform variance analysis, including drill-down into underlying transaction detail from other systems
- Distribute report books via email for financial presentations such as board packages and executive reporting
- Improve accuracy and turnaround time in the planning and reporting process and conduct frequent re-forecasting and what-if analyses

The Adaptive cloud is the perfect solution for nonprofits and educational institutions.

- It provides exceptional value. Keeping spending down is important for any nonprofit or education organization. Adaptive's solution provides a five-year ROI of up to 650% compared to using spreadsheets, and has a total cost of ownership that's up to 77% less than on-premise alternatives. And it's low-risk, with the options of free trials and phased implementations.
- There is no IT involvement required. It's in the cloud, so no new hardware, software, or IT support is required for initial implementation or ongoing maintenance.
- It's intuitive and easy to use. Adaptive's CPM engine saves time and effort with built-in intelligence. Customers can avoid the wasted time associated with spreadsheet-based systems. And its web-based, highly-customizable, Excel-like interface is easy for all types of employees to learn and use.

“We were all looking to transform our budgeting processes and Adaptive Planning was the solution reconnecting us around a common goal. After signing up for a free trial, I found the application intuitive and robust and immediately built a model to show the capabilities to our CFO.”

Peggy Papaioannou
Controller, Museum of Contemporary Art,
Chicago

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- Hawaii Pacific University
- KIPP
- Liberty Science Center
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- Playworks
- Special Olympics
- Stanford University
- United States Olympic Committee
- University of Washington
- USA Volleyball
- Volunteers of America
- YMCA

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