Connecting the Information Dots

A Webinar Series for International Not-For-Profit Organizations
# Upcoming Webinars – 2015

<table>
<thead>
<tr>
<th>Date/Time</th>
<th>Topic</th>
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<tbody>
<tr>
<td>Tues, Aug 11 @ 11:30AM – 12:45PM ET (Tentative)</td>
<td>Domain Overload: Approaching Top-Level Domain Management for iNGOs</td>
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<tr>
<td>Thur, Sept 10 @ 11:00AM – 12:00 Noon ET</td>
<td>DHIS 2 Lite: Open Source M&amp;E Solution (Simplified)</td>
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Webinar Recording

• We’ll be recording the webinars in our series
• We’ll make these recordings available to those who attended the webinars first, and then to the general public
Questions

• Type your questions in the QUESTIONS box of the control panel. We’ll ask the presenters to respond to timely questions during their presentation. We’ll address the rest of the questions at the end of webinar.

• By default, your microphone is muted. Because we have so many attendees, we’ll keep everyone muted throughout the webinar.
Today’s Webinar

Today’s Finance Team: From Money to Mission

Presenters
David Geilhufe, Senior Director, Corporate Citizenship & Nonprofit Vertical, NetSuite
Ingrid Rasmussen, Director of Financial Planning & Analysis, Helmsley Charitable Trust

Moderators
William Lester, Executive Director, NPOKI
Igal Rabinovich, CEO, n-Village
Let’s Take a Quick Poll!

• We want to learn about your organization
• We want to learn about your organization’s current Finance Team
Agenda

1. Introductions
2. Social Impact Drives Complexity
3. What Does Success Look Like?
4. Key Drivers of Success: Planning, Culture & Technology
Speakers

David Geihufe
Senior Director, NetSuite.org
NetSuite

Ingrid Rasmussen
Director, Financial Planning & Analysis
Helmsley Charitable Trust
Gartner Names NetSuite the Fastest Growing FMS Software Vendor Globally, by Market Share Growth

Market Share: All Software Markets, Worldwide, 2013, Published April 2014
Chart created by NetSuite based on Gartner Market Share Note
Fuel Your Mission with NetSuite.org

Corporate Citizenship | Social Impact | Nonprofit Vertical

Compassion

fh CANADA

water for people

Kiva
OUR MISSION

To improve lives by supporting exceptional nonprofits and other mission-aligned organizations in the U.S. and around the world in health, selected place-based initiatives, and education and human services.
BY THE NUMBERS

● Relatively new
  • Launched active grantmaking in 2008

● Relatively large
  • 11th largest foundation in the U.S.
  • >$5 billion in assets
  • >$1.25 billion in approved grants to date

● Approximately 90 employees, including 40 grantmaking staff
Social Impact Drives Complexity
Charities and Social Enterprises
Why They’re Complex

Maximize Social Impact

Subject to Profit Constraint

\[ \text{PROFIT} = \text{REVENUE} - \text{COST} \]

To increase... increase... or decrease...
AUDIENCES & ANALYSIS

- Grants
  - Programs
  - Operating Expenses
  - Departments
  - Investments
  - CEO/CFO/Trustees
  - Accounting
- Taxes
- Monitoring & Evaluation
- Endowment
What Does Success Look Like?
Moving From “Bean Counting” to Insight

- Strategic Decision Support
- Planning Control & Submission
- Forecasting
- Variance Reporting
- Basic Reporting
- Transactional Processing & Journals
- Internal Controls & Security
The Skills Required

- Insatiable Desire to Untangle Problems
- Strong Grasp of the Business
- Mastery of Analytical Tools
- User Friendly Self-Service Tools
- Compelling Communication Skills
- Customer Service Dedication
- Deep Knowledge

FP&A Excellence
EXAMPLE #1: ENGAGEMENT

● A successful FP&A department will:
  ● foster open, trusting, and supportive relationships
  ● create processes that include and engage most staff or departments in the organization
  ● encourage “give and take” of data
  ● educate staff as to the importance of the data they provide and analysis they receive
  ● be consulted regarding implications of program and financial decisions
EXAMPLE #2: STORYTELLING

● A successful FP&A department will be able to tell a story that will impact the entire organization, not just Finance.

  ● Funding trends at NFF
  ● Timing of payments to grantees at Helmsley
Key Drivers of Success:
- Planning
- Culture
- Technology
Is Planning a Core Value?
Is the Culture Ready?

Stay ahead of the culture by creating the culture.

d Hugh
Does the Technology Enable the Goal?

- Complete
- Flexible
- Democratic
Q & A
Contact Information:

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