

# Data-Driven Decision-Making for Not-for-Profits



## How Nectari Can Increase Your Impact

Today's not-for-profit (NFP) organizations face a host of challenges in pursuing their mission. Things like limited funding, resource constraints, and an increasing demand for services can hinder their success.

With Nectari, NFPs can use data-driven insights to inform decisions on resource allocation, program effectiveness, and strategic planning. By analyzing donor data, Nectari can help improve fundraising efforts, donor retention, impact assessment, financial management, operational efficiency, and risk mitigation.

Challenge	Solution
<p>Limited funding</p>	<ul style="list-style-type: none"> <li>• One solution for data management, reporting, dashboarding</li> <li>• Reduce development time with prebuilt NFP templates</li> <li>• Concurrent licensing allows for more users with fewer licenses</li> </ul>
<p>Lack of expertise</p>	<ul style="list-style-type: none"> <li>• Ease of use and flexibility for business users (less training)</li> <li>• Customization does not require technical knowledge</li> <li>• Quick access from the ERP and in a familiar Excel environment</li> </ul>
<p>Access to quality data</p>	<ul style="list-style-type: none"> <li>• Less manual processes for more accurate results</li> <li>• Report on multiple data sources with one solution</li> <li>• Consolidate Sage Intacct tenants without pricey modules</li> <li>• Adaptable for multi-currency reporting</li> </ul>
<p>Multiple stakeholders</p>	<ul style="list-style-type: none"> <li>• Collaboration suite to share with external and internal users</li> <li>• Can embed in the ERP or online in other applications</li> <li>• Easy-to-read dashboards that capture financial/program health</li> </ul>

Take a holistic approach with Nectari to optimize organizational performance, increase credibility, and improve stakeholder and public support.

## Revenues & Expenditures – Actual vs. Budget

Compare the actual revenue and expenditures to budgeted amounts to gain insights into financial performance and variance analysis, uncovering areas where adjustments may be needed to align with financial goals and objectives.

	Month to Date				Year to Date			
	Actual	Budget	Var %	Year %	Actual	Budget	Var %	Year %
<b>Operating Revenue</b>								
Grant Revenue	-	-	-	0.00%	181,280.00	-	-	0.00%
Grant Income	-	-	-	0.00%	242,218.75	1,725,000.00	23,221.18	14.04%
Federal Grants	23,221.18	-	23,221.18	0.00%	-	-	-	0.00%
State Grants & Contracts	-	-	-	0.00%	125,000.00	-	-	0.00%
Local Grants & Contracts	-	-	-	0.00%	-	-	-	0.00%
Foundation Awards	-	-	-	0.00%	-	-	-	0.00%
<b>Total Grant Revenue</b>	<b>23,221.18</b>	<b>-</b>	<b>23,221.18</b>	<b>0.00%</b>	<b>348,498.75</b>	<b>1,725,000.00</b>	<b>23,221.18</b>	<b>13.80%</b>
<b>Contributions</b>								
Contributions	113,315.59	219,576.76	(128,261.17)	47.30%	876,137.24	3,908,091.67	(1,026,954.43)	22.50%
Gifts in Kind Donated Goods	14,132.76	11,632.95	2,521.81	121.72%	67,398.73	589,220.08	(121,821.35)	35.62%
Bequests and Legacies	-	8,761.95	(8,761.95)	0.00%	25,792.00	158,761.63	(132,969.63)	18.89%
<b>Total Contributions</b>	<b>127,448.35</b>	<b>240,971.66</b>	<b>(133,483.32)</b>	<b>48.84%</b>	<b>973,328.97</b>	<b>4,556,073.37</b>	<b>(1,262,787.40)</b>	<b>22.87%</b>
<b>Member Fees</b>								
Membership Fees	21,469.55	15,108.14	6,361.41	142.11%	155,099.21	246,212.50	(143,113.29)	41.87%
<b>Total Member Fees</b>	<b>21,469.55</b>	<b>15,108.14</b>	<b>6,361.41</b>	<b>142.11%</b>	<b>155,099.21</b>	<b>246,212.50</b>	<b>(143,113.29)</b>	<b>41.87%</b>
<b>Service Fees</b>								
Medicare/Medicaid Payments	186,625.75	-	186,625.75	0.00%	1,002,476.91	-	1,002,476.91	0.00%
Service Fees	186,625.75	118,535.23	68,090.52	493.17%	1,002,476.91	2,207,663.15	(1,205,186.24)	44.40%
<b>Total Service Fees</b>	<b>373,251.50</b>	<b>118,535.23</b>	<b>254,716.27</b>	<b>214.95%</b>	<b>2,004,953.82</b>	<b>2,207,663.15</b>	<b>(202,709.33)</b>	<b>88.82%</b>
<b>Investment Earnings</b>								
Interest Income	397.30	328.40	70.90	121.72%	1,894.66	5,219.24	(3,424.58)	35.62%
Dividends	9,558.89	8,239.42	1,319.47	122.70%	28,688.07	72,666.20	(13,778.13)	35.62%
Unrealized Gain (Loss) Investments	16,345.87	15,429.12	916.75	121.72%	77,962.90	218,850.29	(140,887.37)	35.62%
Realized Gain (Loss) Investments	55,734.21	45,769.02	9,965.19	121.72%	285,794.80	746,209.42	(460,414.62)	35.62%
<b>Total Investment Earnings</b>	<b>76,136.27</b>	<b>61,765.96</b>	<b>14,370.31</b>	<b>123.22%</b>	<b>346,539.23</b>	<b>1,043,945.15</b>	<b>(697,405.92)</b>	<b>35.62%</b>
<b>Other Revenue</b>								

## CFO Dashboard

Get a snapshot of key financial metrics such as revenue sources, expenses, cash flow, program efficiency, and identify opportunities to improve operational efficiency and optimize financial performance across the organization.

