How Non-Profit Organizations Can Run & Succeed Using ERP Software

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Executive Summary

Nonprofit organizations worldwide play a crucial role in the upliftment of society and to encourage them, governments extend support in the form of special privileges such as tax exemptions, access to government grants, etc. These benefits come along with certain restrictions and vary based on the place of incorporation.

For example, the Internal Revenue Code regulates nonprofits in the US and currently there are 1,757,306 nonprofits registered with the IRS (The IRS, 2021). These nonprofits enjoy the tax-exempt status but must comply with regulatory requirements such as public disclosure and mandatory filings. This brings along the need for advanced data collection and financial reporting, which becomes easier with a robust ERP system.

In the US, nonprofits employ roughly about 12.3 million people, which is about 10.2% of the total US private sector employment (US Bureau of Labor Statistics, 2018). So, considering that the Federal minimum wage is \$7.25, the spending is close to \$89,175,000 per hour. This spending has only increased during COVID-19 as more and more volunteers are hesitant to step out (Fidelity Charitable, 2020).



As a result, nonprofits are compelled to get the most out of their existing resources by managing them in a prudent and efficient manner. This becomes easier with an ERP solution like Odoo which comes with a powerful Project Management app that allows the user to set and allocate tasks, automate emails, and do much more.

Online fundraising has become increasingly popular and that is largely due to the fact that over 50% of the population consists of Gen X and the Millennial generations (Nonprofit Source, 2021). In fact, in 2017 alone, over \$144.8 million were raised in Canada through online fundraising (Canada Helps, 2020).

Also, a large portion of the \$410 billion donated by Americans during the same year came through digital means (Nonprofit Source, 2021). This requires extensive marketing automation and with a powerful ERP, nonprofits can easily reach out to prospects through SMS, Email, and Social Media channels with just a few clicks.



To run a successful nonprofit, it is important to have a regular inflow of funds and that is only possible by promoting monthly giving programs. This requires a subscription-like application to be implemented along with automated emails and SMS to remind subscribers to do their bit.

Although it may seem overwhelming, the entire process can be easily streamlined with the right ERP solution. Moreover, it is worth the effort because over 40% of Millennials and 49% of Gen X are currently enrolled in a monthly giving program (Nonprofit Source, 2021).





Introduction

Nonprofits play a crucial role in building equitable and healthy communities through clearly defined goals. Their sole purpose is public good through various initiatives directed towards extending support to the underprivileged and those who are vulnerable. In doing so, each charitable organization has its own mission and purpose to which it is dedicated - social welfare, climate change, LGBT rights, animal rights, etc

Based on its mission and the volume of operations, the nonprofit's internal mechanisms may greatly vary. For example, a homeless shelter in New York City may have its own criteria to receive and process applications from homeless individuals. They may want to receive applications digitally and prioritize ones that come from those who are infirm or disabled. Given the fact that New York City has the highest number of homeless individuals, this can get quite difficult (Forbes, 2021).





Likewise, institutions offering online counseling to the distressed need to plan their workflow and assign calls to the right volunteers. These custom needs create operational hurdles for almost all nonprofit organizations and hinder their growth. The only viable solution would be to automate redundant tasks in a cost-efficient manner which would save millions of dollars in operational costs, which can then be used for the public good.



In the US alone, there are 1,757,306 nonprofits registered with the IRS and they employ roughly about 12.3 million individuals (The IRS, 2021). Now, that sums up to 10.2% of the total US private sector employment, with the highest number of nonprofit jobs in Washington DC (US Bureau of Labor Statistics, 2018). Going by the Federal minimum wage viz. \$7.25, this totals up to \$89,175,000 per hour, and a lot of this is lost due to a bad IT infrastructure.

This is where an Enterprise Resource Planning (ERP) solution can make a massive difference because it cuts down the operational costs considerably. However, this is not the only reason to implement it - nonprofit organizations worldwide enjoy certain special privileges like tax exemptions and government funding. These bring along the need for transparency and accountability, which requires extensive documentation to make the necessary disclosures.

For any government, offering tax exemptions results in the loss of revenues but this is done to encourage the good work done by the nonprofits. However, to prevent its misuse, certain restrictions are imposed on them, and any non-compliance is usually responded to with a suspension of the tax-exempt status.



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The Big Challenge

As discussed, nonprofits enjoy tax perks but need to undergo rigorous compliance against the backdrop of an economic slowdown. The decreasing funds from donors and the increasing number of sufferers in need of rehabilitation and medical assistance has adversely affected nonprofits worldwide.

Alongside the COVID-19 pandemic, the year 2020 also witnessed several other disasters like the Atlantic hurricanes, Australian Wildfires, Tsunami in Greece, and more. As a matter of fact, over 207 natural disasters were reported that very year and the cumulative losses from them exceeded \$75 billion (DownToEarth, 2020).

The mass destruction caused by these incidents made recovery and rehabilitation a distant dream for most victims. It is no secret that relief from the respective governments takes time. In such situations, any intervention by the nonprofits makes a huge difference and that's the reason why donors contribute to such organizations when disasters strike.



Although nonprofits raise funds much faster, there is a lot of financial management, coordination, communication, and governance that goes into it. Plus, the donors want a report that measures the impact their contribution has made. Managing all of this can be complex and expensive for an organization that aims at saving every penny it can in order to make someone's life better.

One way of doing that is by lowering the operational costs but without any compromise on efficiency and transparency and that's where an ERP solution like Odoo can make a huge difference. It creates a highly integrated infrastructure that makes managing complex tasks like sourcing funds and measuring outcomes a whole lot easier.

It ties up all the core functions such as accounting, project management, financial reporting, donor communications, and much more. Also, it helps with the compliance part by allowing deeper insights into how the organization spends each dollar. Besides that, the ERP can also positively impact the inflow of funds through digital means. In this whitepaper, we shall discuss how a nonprofit can function efficiently and scale its operations.





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Nonprofits and ERP

An Enterprise Resource Planning (ERP) software refers to a suite of applications that work seamlessly to facilitate the core operations of an organization. Although quite popular in the business sector, it is rarely implemented in the nonprofit and public sectors. The reason for this is the lack of customization, which is essential for nonprofits due to their unique approach.

Unlike for-profit organizations, nonprofits do not track revenues but are more engrossed in measuring outcomes and the impact of their campaigns. This involves the collection, segregation, and analysis of data based on predefined quantitative and qualitative metrics - a feat that can be achieved either with a multitude of unintegrated third-party apps or with a highly integrated and versatile ERP system. The latter is recommended as it is fast, secure, and easy to manage in the long run.



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Why do Nonprofits Need an ERP Solution?

Nonprofits across the globe enjoy certain special privileges like tax exemptions, perpetual existence, postal discounts, and access to government grants. To keep a tab on the misuse of these benefits bestowed upon them, certain reasonable restrictions are imposed.

For example, the IRS requires charitable organizations in the US to operate solely for the purpose it is exempt (IRS, 2021). Also, it requires mandatory periodical disclosures, failing which the organization may lose its tax-exempt status. Therefore, charitable organizations must comply with the rules and regulations laid down by the IRS or its counterparts worldwide.

Now, this becomes impossible in the absence of a system that collects, stores, and retrieves data at the click of a button. That is essential because doing all of this manually could take forever and require a large team and multiple digital tools, none of which come free of cost. This is where an ERP solution like Odoo can automate the process by facilitating everything from online data collection to curating periodical reports. Most importantly, it helps coordinate, track, and evaluate spending on each activity which translates into huge savings.



Case Study 01 Overcoming Coordination Hurdles During the Pandemic

During the pandemic, Bruss' Help, a Belgian nonprofit, was able to change its operational model to address the need of the hour. This nonprofit's focus was to provide shelter to the homeless diagnosed with the Coronavirus but had serious trouble coordinating between three groups - its volunteers, testing centers, and the homeless who tested positive.

The process involved making numerous calls, manually entering data into dozens of excel spreadsheets, and curating reports of those who needed support. Also, suitable places had to be found where the homeless sick could stay. This resulted in fragmented communication and data which consumed a lot of time and resources.

So, the need of the hour was a centralized system capable of recording and storing the diagnosis made by the doctors who visited the various facilities, and classifying individuals based on those reports. These requirements were taken care of by the Odoo Contacts and Helpdesk which proved to be extremely beneficial in minimizing the time and effort that went into coordinating these redundant tasks.

Post implementation, Bruss' Help easily records data transmitted across 150 organizations effortlessly. The nonprofit's team can now effortlessly access the integrated reports based on the inputs from its 11 doctors and identify those in need of help. As a result, this organization can now dedicate most of its resources to the vulnerable instead of administrative tasks.

Read more here



Besides case management, compliance is a big deal for nonprofits worldwide because regulators demand a high degree of conformity. In the case of a charitable institution, their modest budget may not be able to fund the salaries of a large team specialized to do that. This is where an ERP solution like Odoo can be a key enabler in centralizing data and making it accessible through a secure application.

Case Study 02 Replacing Obsolete IT Infrastructure with ERP

Amnesty Italy started off with a modest IT infrastructure which sufficed for well over a decade and a half but later on, became obsolete. So, after 17 years of successful operations, the system no longer supported the nonprofit's initiatives and roadblocked growth due to heavy operational costs. This brought about the need for a more advanced solution, one that is sophisticated enough to automate redundant tasks.

Amnesty's key requirements included collection, classification, and storage of donation-related details and their prompt retrieval. These needs were taken care of with Odoo CRM, Helpdesk, Project, and Calendar apps which worked seamlessly with Amnesty's four custom-developed apps (made possible by Odoo Studio). So, the implementation of Odoo optimized Amnesty's workflow and increased productivity by integrating key operational functions like donations and finance. As all of this was done on a budget, Amnesty could scale its operations, cut costs and get the most out of its budget.

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Benefits of ERP to Nonprofits

We have only touched the surface about the heights an organization can reach by implementing the right ERP solutions. There are several other benefits to it, and we shall now discuss some of those in detail.

Arrange and Coordinate Help

Due to the pandemic and its socio-economic impact, nonprofits across the globe are experiencing troubling declines in the number of volunteers dedicating their time towards social initiatives. This has resulted in shortages of helping hands at a time when the needy are flocking charitable organizations in the hope of help and support (Fidelity Charitable, 2020).

A viable solution would be to make use of digital technology to find volunteers willing to go that extra mile to make others' lives better. However, that is easier said than done because it's never easy to organize charitable activities and allocate tasks to a bunch of new volunteers that are recruited online. You never know who is capable of what tasks and that makes workflow management a cumbersome process.



An easy way out is to make use of a highly integrated system like the Odoo which allows you to do everything from building a website to collecting and recording data from those interested in offering their time as volunteers. Then on, you can store volunteer profiles and based on their expertise and availability, assign them tasks they can handle.

Online Fundraising

Online fundraising campaigns have created ripples across the globe by paving the way for quick funding from those interested in a particular cause. In 2017 alone, over \$144.8 million were raised in Canada through digital means (Canada Helps, 2020). The same year, Americans gave about \$410 billion and a large portion of that came from online donations. After all, over 50% of the current population is either Millennial or Gen X - two internet-savvy generations that are known to be more giving than their predecessors (Nonprofit Source, 2021).

Currently, over 40% of Millennials and 49% of Gen X are enrolled in a monthly giving program (Nonprofit Source, 2021). Such donors are highly desirable as they facilitate the regular inflow of funds which provides financial stability to the nonprofit. However, enabling such a subscription-based model is not easy, and setting up the IT infrastructure required to promote and manage such programs can be overwhelming.

In such cases, Odoo can be very instrumental in adding a high degree of functionality along with backend integration. This makes it a whole lot easier to organize fundraising events, manage recurring subscriptions, integrate contact forms, share slideshows and interactive content, and much more. For those reaching out to a global audience, it also comes with multilingual and multicurrency support to make the entire process hassle-free.



Manage Content Effortlessly

Charitable organizations thrive on donations that come from patrons who believe in a common cause and support it. A vast majority of those are individual donors, who are always curious to know how their hard-earned money is being spent. As a matter of fact, about 80% of donations in the US come from common folks who give away a part of their earnings to make a difference in the life of others (Balancing Everything, 2021).



Therefore, to put their minds at ease, nonprofits must provide deeper insights into how their contributions are changing the world. This can be done by sharing relevant data with them in the form of slideshows, reports, and much more which helps garner trust and credibility. Also, sharing social proof such as testimonials can go a long way in garnering trust and nurturing your relationship with the nonprofit.

After all, 35% of all donations are said to be influenced by social media content in one way or the other (Non Profit Pro, 2017). As a matter of fact, experts conclude that giving has increased by 81% since 2012 when social media platforms became popular. As a nonprofit, you can use an ERP to share content easily across your social media handles and also use other digital modes like web push notifications, live chat, etc.



Financial Analysis and Reporting

In the case of nonprofits, contributions come in from various donor segments and this needs to be segregated and analyzed periodically. For example, it could come from corporations, government grants, other partners, or individual contributors. The utilization of funds coming from each of these segments must be separately recorded and curated as financial reports.

These financial reports provide deeper insights at both macro and micro levels which aid in optimizing the resources consumed by each campaign. As these need to be produced when requested by the public, maintaining such records is essential. However, that's not achievable manually because every nonprofit manages tens of charitable campaigns. So, the best way to go about it is by automating the process using an ERP with finance, storage, and other applications that collectively facilitate this.

Accelerate your Marketing Efforts

Nonprofit organizations need contributions, donors, and other resources to survive, which explains why they must amplify their marketing efforts. Although it all begins with a robust marketing plan, the goal here is to do more with less and that is only possible when the right marketing automation tools are used. In this case, you need tools that support bulk emailing, push notifications, social media marketing, and other resources that corroborate the good work your organization has been doing.

In 2021, the focus of any nonprofit's marketing efforts should be on driving repeat donations through memberships. After all, repeat donors reportedly give 42% more than one-time donors, and that makes all the difference (MatchPro, 2020). By dedicating your efforts towards this donor segment, you can reduce the cost of acquiring donors considerably. After all, donor retention is undoubtedly cheaper than acquiring new donors as the latter requires rigorous promotional campaigns.



However, to retain donors in the long run, it is essential for nonprofits to invest in nurturing relationships through inbound marketing. Odoo lets you manage social media posts, classify leads, and even run email campaigns effortlessly. The best part is that all of this happens simultaneously, without creating islands of data.



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Challenges Faced by Nonprofits

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The sole purpose of a nonprofit is to make a difference in the lives of others and like every other noble object, that requires contributions. These come from donors and patrons who trust the organization and believe in its purpose. So, they need to be kept in the loop about the daily operations and the ongoing progress made by your organization.

This can bring in a plethora of challenges due to the continuous follow-ups and monitoring required. After all, your donors must be treated accordingly so that they continue to contribute. Now, that is just a snapshot of the hurdles that come in the way of a nonprofit's overall operations but there is much more to it.

We shall now discuss some of the most common challenges involved in running and operating a nonprofit. Since we are living in a digital economy, we shall focus on technological complexities and potential solutions.





Managing Large Donor Base

Unlike a for-profit business, nonprofits deal with donors and not customers. This impacts everything from business communication to billing and everything in between. Unless done efficiently, it could result in loss of patrons - something that no nonprofit organization can afford. Conversely, if done the right way, it could turn donors into patrons and generate a steady inflow of funds for the organization's charitable initiatives.

To start on the right foot, charitable organizations must build a rapport with their donors through regular electronic communication. Since most of the communication and giving now takes place online, it only makes sense to focus more on this direction. After all, 25.9% of the current US population are millennials and 40% are Gen X - two of the most tech-savvy and generous generations ever (Huff Post, 2017).



Therefore, a strong digital presence is essential and to build that, there needs to be a mechanism in place. One that enables the nonprofit to connect with donors, segment them, and give them suitable gentle nudges through push notifications. All of this would be possible through a judiciously implemented ERP system that facilitates all of this.



Working with Limited Resources

Nonprofits seldom have the resources to operate with a fancy office, sophisticated IT infrastructure, and a bunch of employees from premier business schools. Yet, they employ over 10% of the total population employed in the US (US Bureau of Labor Statistics, 2018). However, the human capital along with other resources must be managed efficiently to do justice to the contributions made by the patrons.

The proprietors of charitable organizations can do so by cutting down operational costs through the implementation of a highly integrated solution like Odoo. It combines all the functions required to manage and track campaign-specific overheads by facilitating communication between critical applications such as CRM, project management, helpdesk, billing, etc.

This provides useful insights into previous correspondence and contributions made by donors and allows you to approach them accordingly. Such data-driven strategies work extremely well for organizations operating with a limited workforce. Nonprofits can take this one step further by leveraging project management tools that enable proper management of human capital and other cost-intensive resources.

Tracking and Reporting Progress

From fundraising campaigns to fund utilization, there is a lot that a nonprofit must record and report to the IRS and the public. Any discrepancies in doing so may attract the wrath of the IRS and result in dire consequences. Besides regulatory compliance, tracking and reporting are also necessary to let the patrons know about the impact and outcome of the campaigns they've contributed to. This sort of transparency increases donor retention and benefits the organization in the form of regular inflow of funds.



In the digital times, the best way of doing this would be by adding presentations about the progress made to the website or sending out newsletters via email with the data in it. Therefore, it is necessary for nonprofits to measure the impact of each initiative, which basically refers to the difference they have made in the civic or social life of others. As this involves both qualitative and quantitative aspects, very specific metrics should be used to measure the nonprofit's effectiveness.

Furthermore, these must be measured based on the funding source and that could be government funding, corporate donations, or funds received from individual donors. Accordingly, reports must be created and distributed to all the stakeholders. Manually, this can be a daunting task because data needs to be recorded and collected from multiple files and then presented to the stakeholders.

This isn't the case when you use Odoo which comes with multiple apps that simultaneously perform tasks that are essential to collect, quantify and interpret data with minimal human intervention. You can then pull out relevant reports based on segregated data and publish it for public or private viewing.





Absence of Steady Income

Charitable organizations across the world work on frugal budgets because they lack a steady inflow of contributions. This hurdle can be overcome by initiating monthly giving programs which are extremely popular these days. However, launching such initiatives requires a robust IT infrastructure that facilitates recurring payments, database management, donor segmentation, email campaigns based on predefined parameters, and more.

Once implemented, the next step is to run inbound and outbound promotional campaigns, and to do that effectively, your donors must be segmented. This classification could be based on the actions they've previously taken or demographics. It works wonders because it lets you focus on those who are most likely to positively respond to your efforts.

In this case, you might want to reach out to Gen X and millennials. Although 24% of Gen X and over 34% of millennials identify themselves as atheists, agnostics, or nonbelievers, they have a softer side (Pew Research Center, 2015). Over 40% of them are subscribed to monthly giving programs and that can do wonders for any nonprofit.

Creating a Global Platform

When a nonprofit expands its horizon, the transformation isn't always smooth and convenient because there's a lot that needs to change. From the way resources are managed to the billing configuration, a lot needs to be worked on. Also, other global features like multilingual and multicurrency support need to be configured.

Now, this alone may require a team of experts which can add up to the set-up and operational costs. However, you can avoid that with Odoo. It lets nonprofits scale operations without having to worry about managing new initiatives and creating reports across multiple geographies.



Tracking Impact

Nonprofits report outcomes while for-profits report income and that's how different the two are when it comes to financial reporting and accountability. So, the collection of data is much more complex in the case of nonprofits, but despite that, it must be collected and compiled into an informative report that keeps stakeholders posted about the impact each campaign has generated.

For a charitable organization, such reports help earn more credibility than all the publicity money can buy. The collection of such data allows stakeholders to know exactly what difference their contributions have been making in the lives of others, which encourages them to give more. After all, nonprofits thrive on donations, and to generate them, it is essential to justify the good work they have been doing. So, curating reports is not just a regulatory requirement, but a marketing need that needs to be duly addressed.

As a rule of thumb, the organization must track data that impacts the inflow and outflow of resources along with the changes brought about. This includes tracking different sources of fundings - government, corporate, and individual funding - and collecting data for further analysis. These outputs are then weighed against the outcome of each initiative to determine the impact made by the nonprofit from the various sources.



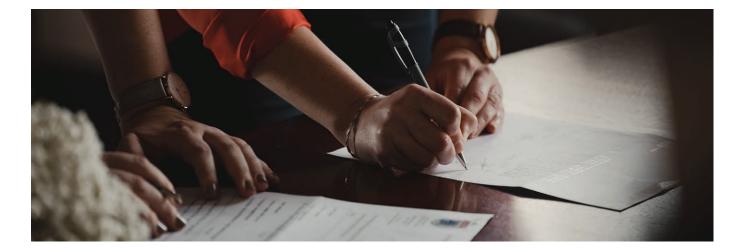
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Compliance

In the US, the only way for a nonprofit to keep its tax-exempt status is by making prompt disclosure of financial data as specified under the Internal Revenue Code. Else, the internal protocol of the IRS triggers the automatic suspension of the nonprofit's tax-exempt status. The triggers include non-filing of Form 990, 990-EZ, 990-PF, or Form 990-N for three consecutive years (IRS, 2021). This suspension prevents them from accepting tax-deductible charitable contributions from donors and wipes out all the benefits that are available to a 501(c)(3) entity.

These stringent requirements are imposed to discourage individuals and business entities from evading tax or stashing away public funds. After all, in 2016 alone, nonprofits in the US reported expenses in excess of 1.94 trillion dollars and assets worth more than 3.79 trillion dollars (Statista, 2021). Although these numbers may seem impressive, exempting them from tax reduces the inflow of funds to the federal treasury.

These losses are borne by the government solely for the benefit of the society at large and it is duly monitored. That explains why the compliance procedures are so rigorous for nonprofits and unless complied with, it can result in the loss of all the benefits bestowed upon such organizations. If you do not want any of that to happen, consider focusing on simplifying the documentation process through a suitable ERP solution.



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Accounting and Disclosure

While operating a 501(c)(3), the proprietor needs to be prepared to make certain documents known. The Internal Revenue Code lays down legal provisions requiring the disclosure of certain documents to the public whenever requested. Some documents that need to be duly disclosed include 3 years' annual returns, Form 990 schedules, application for exemption, etc. These must be provided whenever someone requests them.

If denied, it could result in dire consequences and even turn into a full-fledged internal investigation. The IRS is pretty strict on this, especially if a complaint is lodged using Form 13909 against tax-exempt organizations. Leaders heading nonprofits must also remember that if they misuse their nonprofit status to evade tax or for any other illegitimate reason, the IRS may initiate criminal proceedings.



Conclusions

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An ERP is a suite of applications that streamline complex processes and create an integrated environment, which is essential for any nonprofit organization. If implemented the right way, it can do wonders for charitable organizations trying to sail through these tough times despite their limited resources.

As discussed in this whitepaper, it can be used to kick start monthly donation programs, perform marketing automation, optimize workflow and much more. However, the choice of an ERP determines whether you can achieve all of these functionalities or just some of them. So, it is important to pick one that is versatile, highly customizable, and easy to implement.

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