Fundraising to Finance Assessment

Overview

Fundraising is the lifeblood of many nonprofits, but collaboration between fundraising and finance departments is not as easy as it should be for many nonprofit organizations. The best nonprofits are able to track every dollar raised all the way from appeal to pledge to program spending and results. When fundraising and finance are disconnected, you can easily neglect donors and fail to achieve compliance in gift reporting. This can undermine the trust of donors and motivate them to look elsewhere to fund initiatives.

Evaluate Sylogist's fundraising to finance solution based on the Microsoft Cloud for Nonprofit with our free assessment offering. We will take you through automation of the entire fundraising process with live, interactive workshops tailored to your fundraising and finance teams

Fundraising to finance is an all-in-one, integrated solution that simplifies the processes, reduces errors, and enhances communication within your nonprofit.

The one-day assessment takes you through an evaluation matrix to determine how the solution fits your fundraising programs. Our consultants provide you with access to a solution sandbox including sample fundraising and financial data. You will learn about how reporting differs between fundraising and finance and how to enhance communications on pledges and donation activities.

We will show you how to create campaigns, donation pages, chart of accounts and award management rules.

The assessment includes evaluation of your current automation infrastructure.

Our consultants will share information on the power and security of the Microsoft Cloud for Nonprofits to show how they fulfill requirements. You will learn how to take advantage of integrations with Dynamics 365, SharePoint, Office 365, Excel, Power BI, and other integrated products to support your fundraising activities.

Our team will recommend best practices for automating your fundraising programs. You will receive a written deliverable which includes the following:

- Completed requirements matrix
- Recommended configurations
- Sample end user training materials

The assessment will normally be conducted remotely via teleconferencing, in two half-day sessions.

For Additional Information

Everything Nonprofit & Public Sector Organizations Need to Know about CRM Systems
https://www.sylogist.com/post/crm-system-guide

A Nonprofit's Essential Guide to Accounting Software
https://www.sylogist.com/post/nonprofit-guide-to-accounting-software

What is Fund Accounting? https://www.sylogist.com/post/what-is-fund-accounting

Products

- Microsoft Cloud for Nonprofits
- Dynamics 365 Sales Enterprise
- Power Apps
- Dynamics 365 Business Central
- Office 365