

Mission Amplified: Unlocking Nonprofit Potential with Solver

The xFP&A Solution for Nonprofit Organizations



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Empowering Your Mission: How xFP&A Redefines Nonprofit Strategy

Nonprofit organizations face a unique set of financial and operational challenges that demand more than traditional planning tools can deliver. Office of Finance managers—whether CFOs, budget managers, or controllers—along with executives, grapple with limited resources, complex grant requirements, and the need to demonstrate measurable impact to donors and stakeholders. At the same time, opportunities abound: aligning financial strategies with mission goals, optimizing operational efficiency, and leveraging data to drive decisions can set nonprofits apart in a competitive landscape. Solver, a cloud-based Financial Planning and Analysis (FP&A) solution, introduces “xFP&A”—extended FP&A—bridging the gap between finance and operations to empower nonprofits with actionable insights and streamlined processes.



The pressure to do more with less is a constant reality for nonprofits. Manual reporting processes, siloed data systems, and outdated tools often hinder timely decision-making, leaving leaders reactive rather than proactive. Meanwhile, donor expectations for transparency and accountability continue to rise, requiring detailed tracking of funds and outcomes across programs, grants, and operations. Solver’s xFP&A approach addresses these pain points by integrating financial and operational planning, reporting, and analysis into a single, flexible platform. From KPI dashboards to budgeting templates, Solver equips nonprofit leaders to overcome inefficiencies, reduce risk, and focus on what matters most: advancing their mission.

This eBook serves as your guide to unlocking your organization’s full potential with Solver. Each chapter dives into a critical area—KPIs, financial reporting, operational insights, workforce analysis, and budgeting—highlighting specific challenges nonprofits face and demonstrating how Solver’s powerful, reusable templates deliver solutions. Through real-world examples and visuals, you’ll see how Solver transcends traditional FP&A, offering a holistic view of performance that drives strategic decisions and measurable impact. Let’s explore how xFP&A can transform your nonprofit, starting with the metrics that matter most.

Clarity at a Glance: KPIs That Power Nonprofit Leadership

In the nonprofit world, success isn't just about financial health—it's about delivering on a mission. Key Performance Indicators (KPIs) are the compass that guides leaders toward this goal, offering a clear view of financial stability, operational efficiency, and program impact. Yet, many nonprofit leaders struggle to define and track the right KPIs, often overwhelmed by disjointed data sources or generic dashboards that fail to reflect their unique priorities. This is where Solver's xFP&A shines, providing customizable KPI dashboards that align financial and operational metrics with your organization's mission, empowering CFOs, executives, and managers to focus on what truly drives success.

The stakes are high: without clear KPIs, nonprofits risk misallocating resources, missing funding opportunities, or failing to demonstrate value to stakeholders. Traditional tools often fall short, offering static reports that lack the flexibility to adapt to a nonprofit's evolving needs. Solver changes that with purpose-built KPI dashboards that deliver real-time insights, interactive analysis, and the ability to drill down into variances and trends. Whether it's monitoring grant performance, member engagement, or operational efficiency, Solver ensures leaders have the data they need to make informed, mission-critical decisions quickly and confidently.

Solver's KPI dashboards are more than just visuals—they're strategic tools designed for nonprofit excellence. From interactive layouts that let managers explore metrics in depth to executive snapshots tailored for boardroom discussions, these templates simplify complexity without sacrificing depth. In the sections that follow, I'll showcase images of Solver's KPI dashboard templates—like the Interactive KPI Dashboard and Benchmark Dashboard—each accompanied by a brief description of how they address specific nonprofit challenges. These examples highlight how Solver empowers leaders to cut through the noise and focus on what matters most.



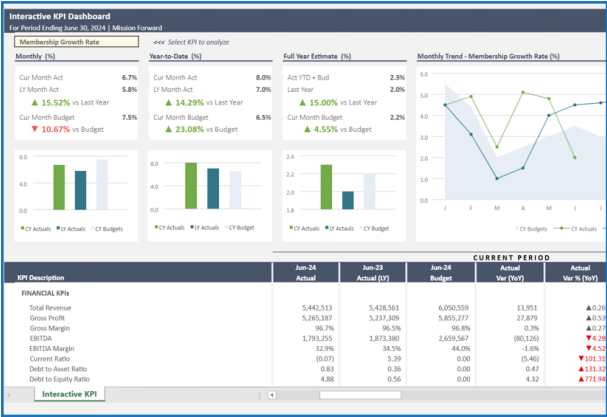
[Click here to visit Solver's Showcase for full screen views of these and other templates.](#)



Below, you'll find brief descriptions of several KPI dashboard templates. These templates are fully customizable, and you can also create your own tailored designs.

V04_K01 - KPI - Interactive Dashboard

When a user selects a KPI from the dropdown menu in this dashboard, all charts and figures interactively display metrics, including variances and trends for the chosen KPI. This feature is ideal for managers who need to analyze all financial and operational KPIs within a single dashboard.



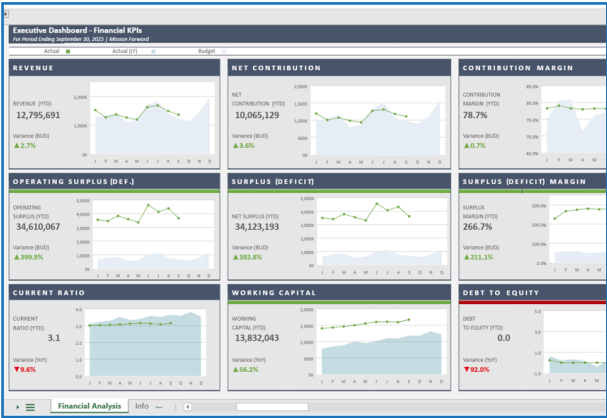
V04_K02 - KPI – Scorecard

This scorecard layout provides a tabular overview of all KPIs, with actual and budget comparisons for monthly and year-to-date figures.

KPI Summary Report <small>For Period Ending June 30, 2024 Mission Forward</small>						
KPI Description	CURRENT PERIOD					
	Jun - 2023 Actual	Jun - 2023 Actual (17)	Jun - 2023 Budget	Actual Var (YoY)	Actual Var % (YoY)	Act vs Bud Var (CP)
FINANCIAL KPIs						
Total Revenue	5,442,513	5,428,561	6,050,559	13,951	0.26%	(608,046)
Gross Profit	5,265,187	5,237,309	5,855,277	27,879	0.53%	(590,968)
Gross Margin	96.7%	96.5%	96.8%	0.3%	0.27%	0.0%
EBITDA	1,793,255	1,873,380	2,659,567	(80,126)	-4.28%	(866,312)
EBITDA Margin	32.9%	34.5%	44.0%	-1.6%	-4.52%	-11.0%
Current Ratio	0.07	5.39	0.00	-5.46	-101.31%	-0.0%
Debt to Asset Ratio	0.83	0.36	0.00	0.47	131.32%	0.8%
Debt to Equity Ratio	4.88	0.56	0.00	4.32	771.94%	4.8%
GRANT KPIs						
Program Efficiency Ratio	72.9%	64.4%	103.4%	8.5%	13.16%	(0.0%)
Grant Utilization Rate	0.80	0.75	0.90	0.05	6.67%	(0.0%)
Remaining Funds Percentage	17.7%	21.0%	21.8%	-3.3%	-15.59%	-4.1%
Compliance Rate	5.2%	3.7%	3.8%	1.5%	40.96%	1.4%
Average Grant Size	55,000	49,000	58,000	6,000	12.24%	(3,000)
MEMBER KPIs						
Total Membership Count	32,300	29,000	31,000	3,300	11.38%	1,300
Membership Revenue	4,360,500	3,925,000	4,185,000	445,500	11.38%	175,500
New Memberships	980	755	900	225	29.80%	80
Average Revenue per Member	66.2%	67.1%	90.9%	-1.0%	-1.42%	-24.7%
DONOR KPIs						
Donor Retention Rate	72.9%	64.4%	103.4%	8.5%	13.16%	-30.5%
Average Gift Size	2,000	2,200	1,900	(200)	-9.09%	100
Fundraising Revenue Growth	50.7%	65.1%	87.0%	-16.4%	-25.1%	-23.4%
KPI Summary						

V04_K05 - Executive Dashboard - Financial KPIs

This KPI report is specifically designed for executives who need a clear and concise snapshot of financial KPIs. It allows for customization, enabling users to replace any KPIs to ensure the most effective analysis.



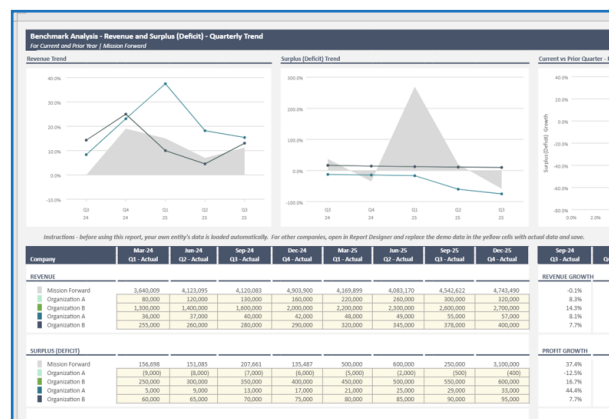
V04_K06 - Executive Dashboard - Operational KPIs

This dashboard is tailored for executives seeking a clear and intuitive snapshot of operational nonprofit KPIs. It allows for customization, enabling users to replace any KPIs to ensure the most effective analysis.



V04_K07 - Dashboard - Nonprofit Benchmark Analysis

This dashboard is valuable for leaders who want to benchmark their organization against external entities, such as publicly traded organizations.

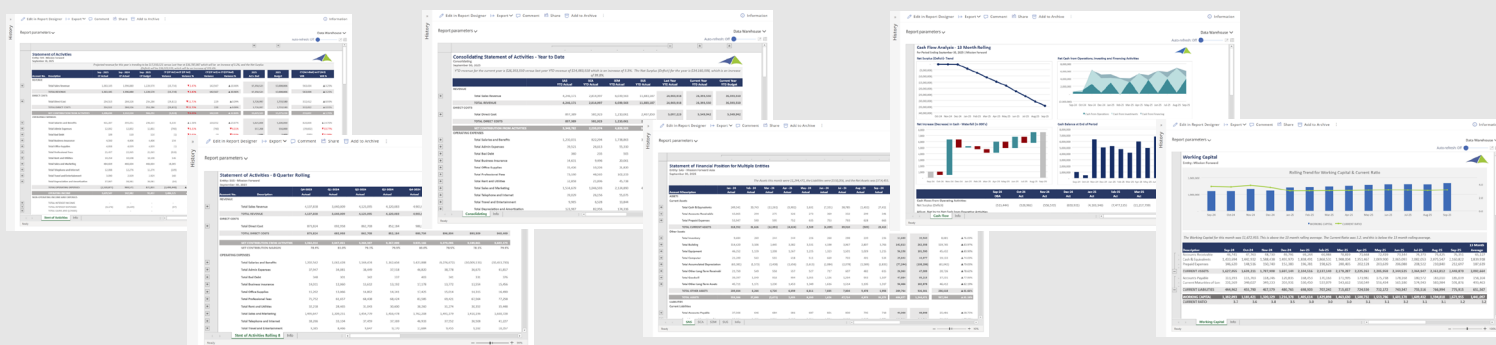


Precision Unleashed: Revolutionizing Nonprofit Financial Reporting

Financial reporting in nonprofits is a balancing act—ensuring compliance, meeting donor expectations, and providing leadership with actionable insights—all while managing tight timelines and limited staff. Many Office of Finance teams wrestle with manual processes, error-prone spreadsheets, and fragmented systems that delay month-end closings and obscure critical trends. These inefficiencies not only drain resources but also erode trust when reports lack accuracy or fail to tell the full story. Solver's modern financial reporting capabilities tackle these challenges head-on, automating workflows and delivering precise, professional-grade reports tailored to nonprofit needs.

The stakes are higher than ever as nonprofits face increased scrutiny from regulators, donors, and boards. Traditional tools often leave finance teams scrambling to consolidate data from multiple entities or track grant-specific finances, resulting in delayed decisions and missed opportunities. Solver's xFP&A approach streamlines this process with a cloud-based platform that integrates data, automates variance calculations, and generates dynamic reports like Statements of Activities and Cash Flow Analyses. By reducing manual effort, Solver frees up finance leaders to focus on analysis and strategy, ensuring every dollar is accounted for and aligned with the mission.

What sets Solver apart is its library of reusable financial reporting templates, designed to simplify complexity and enhance transparency. From variance reports that highlight performance gaps to rolling historical views that reveal long-term trends, these tools empower nonprofit leaders with clarity and control. Following this introduction, you will find images of Solver's sample financial reporting templates—like the Statement of Activities Variance report and the Cash Flow Analysis report —each paired with a short paragraph explaining its value. These examples demonstrate how Solver transforms financial reporting into a strategic asset for your organization.



Click here to visit Solver's Showcase for full screen views of these and other templates.



Below, you'll find brief descriptions of several financial reporting and consolidations reports. More are available in Solver's template Marketplace. The templates are customizable using Solver's Report Designer, and you can also create your own tailored designs.

Note: Any of these reports can be modified to include General Ledger dimensions such as Programs, Funds, Projects, Grants, Location, etc.

V04_R110_MOD - Statement of Activities - Variance

At the heart of nearly every month-end process is a Statement of Activities variance report. This template automatically generates rows based on account categories and displays monthly and year-to-date (YTD) actuals and budget amounts in the columns. Variances are shown as both amounts and percentages, with color-coded indicators—red for unfavorable and black for favorable—making it easy to identify performance differences.

Statement of Activities										
Entity: 101 - Mission Support										
September 30, 2025										
Projected revenue for this year is trending to be \$17,040,122 versus Last Year at \$16,767,087 which will be an increase of 1.2%, and the Net Surplus (Deficit) will be \$16,767,087 which will be an increase of 1.2%.										
Account No.	Description	sep 2025 CF Actual	sep 2024 CF Actual	sep 2025 CF Budget	CF (P Act) vs CF (P Bud)	Variance %	sep 2025 CF (P Act) vs CF (P Bud)	Variance %	2025 YTD Budget	2025 YTD Actual
REVENUE										
	Total Sales Revenue	1,183,145	1,189,680	1,205,578	(22,433)	-1.86%	142,567	-10.48%	17,040,122	17,040,122
	TOTAL REVENUE	1,183,145	1,189,680	1,205,578	(22,433)	-1.86%	142,567	-10.48%	17,040,122	17,040,122
DIRECT COSTS										
	Total Direct Cost	254,535	254,536	254,586	(50)	-0.02%	229	-0.09%	3,750,000	3,750,000
	TOTAL DIRECT COSTS	254,535	254,536	254,586	(50)	-0.02%	229	-0.09%	3,750,000	3,750,000
	NET CONTRIBUTION FROM ACTIVITIES	928,610	935,144	950,992	(15,882)	-1.70%	112,338	-12.58%	13,290,122	13,290,122
OPERATING EXPENSES										
	Total Salaries and Benefits	402,887	395,051	398,335	6,736	1.71%	103,052	-7.57%	5,401,000	5,401,000
	Total Admin Expenses	12,042	12,002	12,002	0	0.00%	(700)	-5.83%	107,200	107,200
	Total Bad Debt	109	110	110	(1)	-0.91%	(1)	-0.91%	1,000	1,000
	Total Business Insurance	4,500	4,400	4,400	100	2.27%	134	-3.00%	42,900	42,900
	Total Office Supplies	4,800	4,800	4,800	0	0.00%	(1)	-0.02%	40,800	40,800
	Total Professional Fees	21,437	21,285	21,285	152	0.71%	8,000	-37.50%	242,400	242,400
	Total Rent and Utilities	10,254	10,100	10,100	154	1.51%	146	-1.45%	92,000	92,000
	Total Sales and Marketing	484,609	484,604	484,604	5	0.00%	18,000	-3.71%	4,501,000	4,501,000
	Total Telephone and Internet	12,088	12,276	12,276	(188)	-1.53%	(188)	-1.53%	101,200	101,200
	Total Travel and Entertainment	5,000	2,429	2,429	2,571	51.45%	140	-2.78%	28,000	28,000
	Total Depreciation and Amortization	37,587	38,081	38,081	(494)	-1.30%	(94)	-0.25%	380,000	380,000
	TOTAL OPERATING EXPENSES	(2,024,077)	(1,999,071)	(1,977,061)	(24,006)	-1.20%	(1,070,702)	-53.44%	(17,040,122)	(17,040,122)
	NON-OPERATING INCOME AND EXPENSES	0	0	0	0	0.00%	0	0.00%	0	0
	TOTAL NET INCOME	(1,095,467)	(1,063,927)	(1,026,069)	37,858	3.56%	(1,095,467)	-100.00%	0	0
	TOTAL GAINS AND LOSSES	(1,095,467)	(1,063,927)	(1,026,069)	37,858	3.56%	(1,095,467)	-100.00%	0	0
	Start of Activities	Info								

V04_R116_MOD - Statement of Activities - Rolling 8 Quarter

This Statement of Activities report offers managers a historical perspective on revenues, expenses, and profitability over the past eight quarters. The narrative summary at the top of the report is generated automatically, providing a quick overview of the results. The report's header is dynamic: based on the selected quarter, it will automatically display data from the seven preceding quarters.

Statement of Activities - 8 Quarter Rolling										
Entity: 101 - Mission Support										
September 30, 2025										
Account No.	Description	Q4-2023 Actual	Q1-2024 Actual	Q2-2024 Actual	Q3-2024 Actual	Q4-2024 Actual	Q1-2025 Actual	Q2-2025 Actual	Q3-2025 Actual	Q4-2025 Actual
REVENUE										
	Total Sales Revenue	4,117,838	3,640,000	4,121,095	4,120,083	4,903,900	4,189,899	4,083,179	4,083,179	4,083,179
	TOTAL REVENUE	4,117,838	3,640,000	4,121,095	4,120,083	4,903,900	4,189,899	4,083,179	4,083,179	4,083,179
DIRECT COSTS										
	Total Direct Cost	873,824	692,958	862,708	852,184	980,734	896,804	893,345	893,345	893,345
	TOTAL DIRECT COSTS	873,824	692,958	862,708	852,184	980,734	896,804	893,345	893,345	893,345
	NET CONTRIBUTION FROM ACTIVITIES	3,244,014	2,947,042	3,258,387	3,267,899	3,923,166	3,293,095	3,189,834	3,189,834	3,189,834
	NET CONTRIBUTION MARGIN	78.9%	81.0%	79.1%	79.3%	80.0%	78.5%	78.5%	78.5%	78.5%
OPERATING EXPENSES										
	Total Salaries and Benefits	1,202,562	1,042,428	1,169,474	1,162,604	1,423,888	(9,276,672)	(10,009,113)	(10,009,113)	(10,009,113)
	Total Admin Expenses	37,947	34,081	36,449	37,518	46,820	38,778	36,627	36,627	36,627
	Total Bad Debt	348	301	342	337	403	341	33	33	33
	Total Business Insurance	14,011	12,000	11,812	13,192	17,178	13,772	13,554	13,554	13,554
	Total Office Supplies	15,202	13,066	14,802	14,341	17,425	15,014	14,311	14,311	14,311
	Total Professional Fees	71,752	61,657	68,438	68,424	83,585	69,421	67,504	67,504	67,504
	Total Rent and Utilities	32,218	26,465	31,043	30,600	38,260	31,274	30,335	30,335	30,335
	Total Sales and Marketing	1,495,647	1,309,251	1,454,779	1,416,478	1,762,208	1,601,179	1,410,514	1,410,514	1,410,514
	Total Telephone and Internet	38,266	33,104	37,459	37,369	46,933	37,552	36,504	36,504	36,504
	Total Travel and Entertainment	9,385	9,466	9,647	9,170	11,684	9,455	9,141	9,141	9,141
	Start of Activities Rolling 8	Info								

V04_R150_MOD - Statement of Activities - Consolidating Report

This report compares entities side by side with consolidated results for both the current and prior year. Solver also offers alternative reports that present a consolidated view on the first tab, with a detailed report per entity on the subsequent tabs.

Consolidating Statement of Activities - Year to Date							
Consolidating							
September 30, 2025							
YTD revenue for the current year is \$26,393,550 versus last year YTD revenue of \$24,983,918 which is an increase of 5.3%. The Net Surplus (Deficit) for the year is \$34,160,598, which is an increase of 99.8%.							
	SAS YTD Actual	SCS YTD Actual	SEM YTD Actual	SUS YTD Actual	Last Year YTD Actual	Current Year YTD Actual	
REVENUE							
Total Sales Revenue	4,246,171	2,814,997	6,039,563	11,883,187	24,983,918	26,393,550	
TOTAL REVENUE	4,246,171	2,814,997	6,039,563	11,883,187	24,983,918	26,393,550	
DIRECT COSTS							
Total Direct Cost	897,389	581,923	1,210,061	2,407,890	5,097,223	5,349,942	
TOTAL DIRECT COSTS	897,389	581,923	1,210,061	2,407,890	5,097,223	5,349,942	
NET CONTRIBUTION FROM ACTIVITIES	3,348,782	2,233,074	4,829,502	9,475,297	19,886,695	21,043,608	
OPERATING EXPENSES							
Total Salaries and Benefits	1,230,031	822,294	1,738,863	3,374,506	7,165,895	(25,835,238)	
Total Admin Expenses	39,521	26,613	55,310	110,049	231,482	241,839	
Total Bad Debt	360	235	505	980	2,079	2,185	
Total Business Insurance	14,631	9,496	20,061	38,864	83,051	88,285	
Total Office Supplies	15,426	10,226	21,820	42,209	89,881	94,855	
Total Professional Fees	73,190	48,565	102,233	198,519	422,507	443,229	
Total Rent and Utilities	32,858	21,896	45,738	90,109	190,800	201,145	
Total Sales and Marketing	1,534,679	1,046,593	2,124,890	4,180,508	8,886,669	9,388,800	
Total Telephone and Internet	39,029	26,156	55,075	107,932	228,193	239,135	
Total Travel and Entertainment	9,965	6,528	13,844	27,283	57,620	60,061	
Total Depreciation and Amortization	123,987	82,956	174,316	338,320	725,579	757,248	
Consolidating	Info						

V04_R163_MOD - Statement of Financial Position - Multiple Entities

This Statement of Financial Position shows assets and liabilities on a monthly basis. Users can consolidate data from multiple entities by selecting the relevant organizations as parameters when running the report.

Account/Description	Jan -24	Feb -24	Mar -24	Apr -24	May -24	Jun -24	Jul -24	Aug -24	Sep -24	Total
Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	IF Actual
ASSETS										
Current Assets										
Total Cash & Equivalents	249,541	30,743	(13,261)	(5,902)	1,631	(7,331)	38,785	(1,432)	27,411	325,184
Total Accounts Receivable	15,065	294	275	326	273	369	332	299	341	17,573
Total Prepaid Expenses	53,947	590	595	752	635	753	793	628	663	59,254
TOTAL CURRENT ASSETS	318,553	31,626	(12,891)	(4,824)	2,539	(6,209)	39,910	(905)	28,415	397,113
Other Assets										
Total Inventory	9,684	260	244	244	226	268	298	220	236	11,680
Total Building	114,420	3,106	3,445	3,382	3,531	4,190	3,967	2,807	3,766	142,613
Total Equipment	46,252	1,139	1,108	1,267	1,225	1,323	1,501	1,029	1,215	56,139
Total Computer	21,200	563	555	618	511	669	703	491	534	29,843
Total Accumulated Depreciation	(63,381)	(1,573)	(1,438)	(1,494)	(1,613)	(2,084)	(2,078)	(1,589)	(1,831)	(77,244)
Total Other Long-Term Receivable	21,750	549	558	557	527	717	607	482	615	29,363
Total Goodwill	39,397	1,049	918	994	1,055	1,136	1,294	933	1,107	47,684
Total Other Long-Term Assets	45,711	1,171	1,230	1,453	1,349	1,616	1,514	1,105	1,317	56,464
TOTAL OTHER ASSETS	235,034	6,264	6,720	6,859	6,811	7,835	7,804	5,478	6,956	289,764
TOTAL ASSETS	553,587	37,890	(2,671)	2,035	9,350	1,626	47,714	4,573	35,371	686,877
LIABILITIES										
Current Liabilities										
Total Accounts Payable	37,566	646	684	681	687	831	850	705	718	48,368
TOTAL LIABILITIES	37,566	646	684	681	687	831	850	705	718	48,368

V04_R190 - Statement of Financial Position - Working Capital

The chart in this working capital report allows users to easily analyze trends by comparing Working Capital (displayed on the left axis) with the Current Ratio (shown on the right axis).



V04_R187_MOD - Cash Flow Analysis - 13 Month Rolling

This combo report features a dashboard at the top that provides immediate insights into trends in Net Surplus (Deficit), Net Cash from Operations and Financing Investment Activities, Net Increases in Cash, and Cash Balances. The bottom section presents a standard Cash Flow statement.

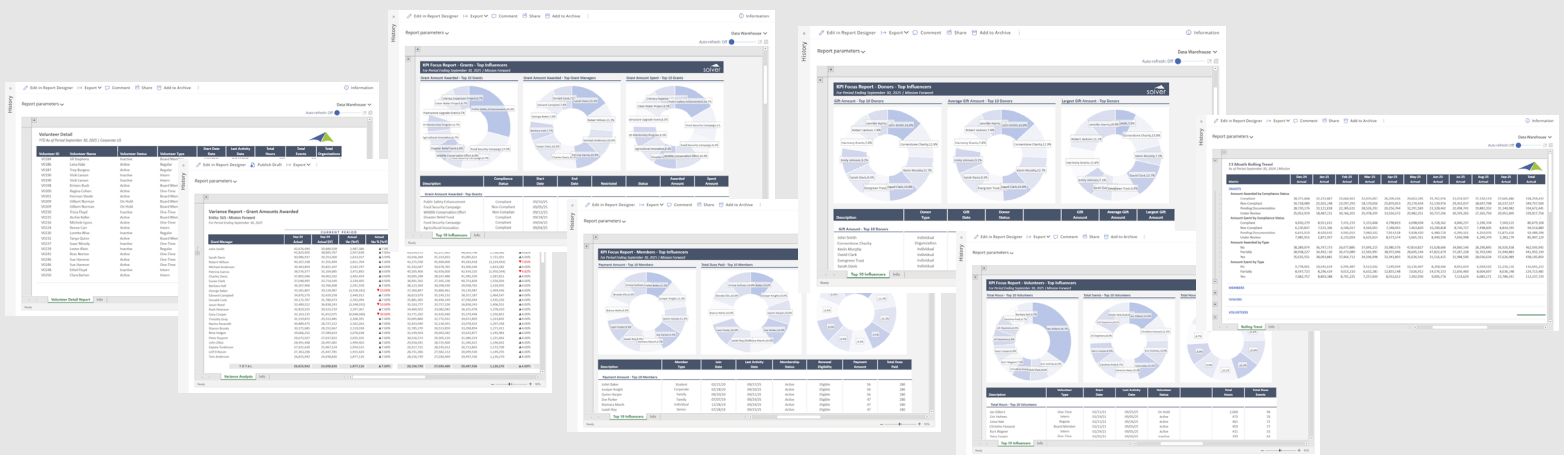


Insight in Action: Boosting Nonprofit Operations with Solver

Nonprofit operations hinge on the interplay of grants, members, donors, and volunteers—yet tracking and analyzing these areas often feels like herding cats. Department heads and executives face fragmented data, inconsistent reporting formats, and a lack of visibility into how these elements drive overall performance. This disconnect slows decision-making, hampers grant compliance, and risks alienating key stakeholders whose support sustains the mission. Solver's xFP&A solution bridges this gap with robust operational reporting and a data warehouse that unifies disparate sources, delivering the insights needed to act swiftly and effectively.

The challenge is compounded by the sheer diversity of operational data nonprofits manage. Grant managers need to monitor spending against awards, membership teams track retention trends, donor relations depend on gift patterns, and volunteer coordinators juggle hours and impact—all while aligning with financial goals. Solver's operational reporting capabilities integrate these streams into a single platform, offering customizable templates that reveal trends, variances, and opportunities. Paired with Solver's KPI dashboards and financial reports, this holistic approach reduces reliance on multiple tools, cuts complexity, and fosters a data-driven culture that maximizes ROI.

Solver's operational reporting templates are game-changers for nonprofit leaders seeking better outcomes. Whether it's spotting grant variances, identifying top donors, or analyzing volunteer contributions, these tools provide clarity and speed. After this introduction, we'll showcase images of Solver's sample operational report templates—like the Top 10 Report for grants and the 13 Month Rolling Trend report—each with a brief description of its purpose and benefits. These examples illustrate how Solver's flexibility and power accelerate decisions, turning operational data into a strategic advantage.



Click here to visit Solver's Showcase for full screen views of these and other templates.



Below, you'll find brief descriptions of a number of Grant, Member, Donor and Volunteer reports. These templates are fully customizable, and you can also create your own tailored designs.

Grant Reports

V04_R01a - Transaction Detail - Grants

This report allows users to track grant information with detailed insights. Each column displays a grant field, while a comprehensive grand total is presented at the bottom, providing a clear summary.

Grant Detail											
As of Period September 30, 2025 Mission Forward											
Grant ID	Description	Grant Manager	Award Date	Restricted	Compliance Status	Start Date	End Date	Status	Amount Awarded	Amount Spent	Amount Available
G017	Workforce Training Program	Kelly Adams	7/1/2025	No	Pending Documentation	9/1/2025	9/1/2028	Completed	229,809		229,809
G018	Cultural Heritage Preservation	Laura Martinez	7/1/2025	Partially	Compliant	9/1/2025	9/1/2028	Expired	652,882		652,882
G019	Food Security Campaign	Christopher Hall	7/1/2025	No	Under Review	9/1/2025	9/1/2028	Completed	1,018,124		1,018,124
G020	Infrastructure Upgrade Grant	Andrew Phillips	7/1/2025	No	Under Review	9/1/2025	9/1/2028	Pending	117,935		117,935
G0001	STEM Education Initiative	Michael Lee	7/1/2025	Yes	Non-Compliant	9/1/2025	9/1/2026	Completed	1,538,328		1,538,328
G0002	Community Health Outreach	Daniel Evans	7/1/2025	Partially	Under Review	9/1/2025	9/1/2027	Pending	587,017		587,017
G0003	Urban Renewal Project	Steven Moore	7/1/2025	Yes	Compliant	9/1/2025	9/1/2027	Pending	1,680,684		1,680,684
G0004	Cancer Research Fund	Rachel Kim	7/1/2025	No	Compliant	9/1/2025	9/1/2027	Active	339,671		339,671
G0005	Arts in Schools Program	David Wilson	7/1/2025	Yes	Under Review	9/1/2025	9/1/2028	Pending	1,626,320		1,626,320
G0006	Rural Broadband Expansion	Michelle Garcia	7/1/2025	No	Pending Documentation	9/1/2025	9/1/2027	Completed	1,629,228		1,629,228
G0007	Youth Mentorship Program	Jessica Young	7/1/2025	Partially	Compliant	9/1/2025	9/1/2027	Pending	1,514,298		1,514,298
G0008	Clean Energy Research	Brian Patel	7/1/2025	Partially	Non-Compliant	9/1/2025	9/1/2026	Completed	1,998,863		1,998,863
G0009	Library for All Campaign	Lisa Nguyen	7/1/2025	No	Pending Documentation	9/1/2025	9/1/2028	Pending	908,811		908,811
G0010	Homeless Shelter Support	Amanda Clark	7/1/2025	No	Compliant	9/1/2025	9/1/2026	Active	1,667,205		1,667,205
G0011	Minority Business Grants	Jessica Young	7/1/2025	Yes	Compliant	9/1/2025	9/1/2028	Completed	923,103		923,103
G0012	Wildlife Conservation Fund	Andrew Phillips	7/1/2025	No	Non-Compliant	9/1/2025	9/1/2027	Active	1,381,562		1,381,562
G0013	Mental Health Awareness	Amanda Clark	7/1/2025	No	Pending Documentation	9/1/2025	9/1/2026	Expired	429,053		429,053
G0014	Tech Innovation Challenge	James Carter	7/1/2025	Partially	Under Review	9/1/2025	9/1/2027	Pending	1,539,895		1,539,895
G0015	Senior Care Assistance	Jessica Young	8/1/2025	Partially	Pending Documentation	9/1/2025	9/1/2027	Expired	571,392		571,392
G0016	Water Quality Improvement	James Carter	8/1/2025	Yes	Under Review	9/1/2025	9/1/2028	Expired	1,429,616		1,429,616
G0017	Disaster Relief Fund	James Carter	8/1/2025	No	Under Review	9/1/2025	9/1/2026	Active	706,304		706,304
G0018	Indigenous Culture Program	Emily Davis	8/1/2025	Yes	Under Review	9/1/2025	9/1/2026	Expired	763,421		763,421
G0019	Green Building Initiative	David Wilson	8/1/2025	Yes	Non-Compliant	9/1/2025	9/1/2027	Expired	301,171		301,171
Grand Total									106,494,800	336	

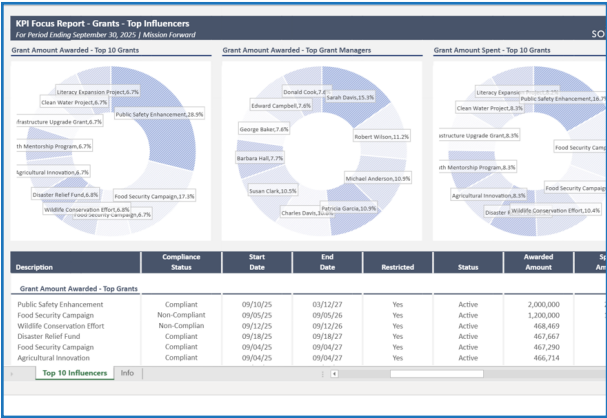
V04_R02 - Variance Report - Grant Managers

This report presents Awarded Amount per grant, with figures displayed for both the current month and year-to-date. It also includes variance comparisons against the prior year, offering insights into financial performance over time.

Variance Report - Grant Amounts Awarded											
Entity: SUS - Mission Forward											
For Period Ending September 30, 2025											
Grant Manager	CURRENT PERIOD				Actual Var % (Yr)	PRIOR PERIOD				Actual Var % (Yr)	YTD
	Sep-25 Actual	Sep-25 Budget	Sep-25 Actual (Y)	Sep-25 Actual (T)		Sep-24 Actual	Sep-24 Budget	Sep-24 Actual (Y)	Sep-24 Actual (T)		
John Smith	42,676,944	39,689,558	2,987,386	▲7.00%	44,810,791	37,463,985	46,944,818	42,676,944	42,676,944	42,676,944	42,676,944
Sarah Davis	41,873,405	38,891,767	2,981,638	▲7.00%	43,416,579	42,122,992	46,005,746	41,873,405	41,873,405	41,873,405	41,873,405
Robert Wilson	40,986,937	39,353,000	1,633,937	▲4.99%	43,036,284	41,314,833	45,085,631	40,986,937	40,986,937	40,986,937	40,986,937
Michael Anderson	40,167,198	37,355,494	2,811,704	▲7.00%	42,175,558	40,400,000	44,183,918	40,167,198	40,167,198	40,167,198	40,167,198
Patricia Garcia	39,363,854	35,821,107	3,542,747	▲9.00%	41,132,647	39,476,795	43,300,240	39,363,854	39,363,854	39,363,854	39,363,854
Charles Davis	38,576,577	35,104,685	3,471,892	▲9.00%	40,505,406	42,456,000	42,434,235	38,576,577	38,576,577	38,576,577	38,576,577
Susan Clark	37,805,046	34,402,592	3,402,454	▲9.00%	39,695,298	38,101,496	41,585,500	37,805,046	37,805,046	37,805,046	37,805,046
Barbara Hall	37,048,945	33,714,540	3,334,405	▲9.00%	38,001,392	37,340,386	40,753,839	37,048,945	37,048,945	37,048,945	37,048,945
George Baker	36,307,966	33,766,408	2,541,558	▲7.00%	38,123,364	36,598,430	39,938,762	36,307,966	36,307,966	36,307,966	36,307,966
Edward Campbell	35,581,867	32,136,987	3,444,880	▲10.00%	37,360,897	35,946,461	39,129,967	35,581,867	35,581,867	35,581,867	35,581,867
Daniel Cook	34,716,170	32,429,258	2,286,912	▲7.00%	36,613,679	35,149,137	38,375,187	34,716,170	34,716,170	34,716,170	34,716,170
Jason Reed	34,172,767	31,780,671	2,392,096	▲7.00%	35,881,405	34,446,149	37,590,044	34,172,767	34,172,767	34,172,767	34,172,767
Ruth Peterson	33,489,312	30,836,243	2,653,069	▲8.00%	35,163,777	33,729,236	36,638,243	33,489,312	33,489,312	33,489,312	33,489,312
Gary Cooper	32,819,525	30,522,559	2,296,966	▲7.00%	34,460,502	33,082,082	36,101,478	32,819,525	32,819,525	32,819,525	32,819,525
Timothy Gray	32,163,135	29,812,075	2,351,060	▲8.00%	33,771,292	32,420,440	35,179,448	32,163,135	32,163,135	32,163,135	32,163,135
Nathaniel Prescott	31,519,872	29,131,481	2,388,391	▲8.00%	33,095,866	31,773,893	34,671,859	31,519,872	31,519,872	31,519,872	31,519,872
Sharon Brooks	30,889,475	28,727,313	2,162,162	▲7.00%	32,433,949	31,136,591	33,978,422	30,889,475	30,889,475	30,889,475	30,889,475
Wes Higgins	30,271,685	28,152,687	2,118,998	▲7.00%	31,785,270	30,511,899	33,298,804	30,271,685	30,271,685	30,271,685	30,271,685
Peter Dupont	29,666,252	27,589,614	2,076,638	▲7.00%	31,149,564	29,963,582	32,632,877	29,666,252	29,666,252	29,666,252	29,666,252
John Ellis	29,072,927	27,037,822	2,035,105	▲7.00%	30,526,573	29,305,550	31,980,219	29,072,927	29,072,927	29,072,927	29,072,927
Zapata Tomkinson	28,491,468	26,497,003	1,994,465	▲7.00%	29,916,041	28,738,400	31,240,615	28,491,468	28,491,468	28,491,468	28,491,468
Tom Anderson	27,921,639	25,967,124	1,954,515	▲7.00%	29,317,721	28,145,012	30,713,803	27,921,639	27,921,639	27,921,639	27,921,639
Tom Anderson	27,363,206	25,447,781	1,915,424	▲7.00%	28,731,366	27,582,112	30,099,526	27,363,206	27,363,206	27,363,206	27,363,206
Tom Anderson	26,815,942	24,938,828	1,877,114	▲7.00%	28,156,139	27,030,469	29,497,536	26,815,942	26,815,942	26,815,942	26,815,942
TOTAL	26,815,942	24,938,828	1,877,114	▲7.00%	28,156,739	27,030,469	29,497,536				

V04_R03a - Top 10 Report - Grants

This visual report features three top ten lists, each represented by a pie chart: 1) Top grant amounts awarded by grant, 2) Top grant managers, and 3) Top grants by amount spent. The data table below the charts includes totals and % of grants total for all grants.



V04_R04 - 13 Month Rolling Trend - Nonprofit Metrics

This report provides a summarized view of: Amount awarded by compliance status, Amount spent by compliance status, Amount awarded by type (restricted, non-restricted), and Amount spent by type. The columns display a rolling thirteen-month period. The report template comes with sections for grants, members, donors and volunteers and those that don't apply can easily be removed or replaced.

13 Month Rolling Trend									
As of Period September 30, 2024 Mission									
Metric	Dec-24 Actual	Jan-25 Actual	Feb-25 Actual	Mar-25 Actual	Apr-25 Actual	May-25 Actual	Jun-25 Actual	Jul-25 Actual	Aug-25 Actual
GRANTS									
Amount Awarded by Compliance Status									
Compliant	18,371,668	32,223,067	23,666,561	22,033,057	26,205,426	29,652,245	25,761,976	21,074,927	17,234,119
Non-Compliant	30,726,089	25,501,248	23,592,291	18,170,056	25,876,053	29,170,434	31,129,976	29,363,037	26,647,798
Pending Documentation	28,725,176	33,121,818	22,385,631	28,526,292	20,256,764	32,291,583	23,328,462	22,498,741	19,883,352
Under Review	25,052,919	18,487,231	30,766,201	25,478,205	33,556,572	20,982,251	30,737,296	30,399,265	27,265,750
Amount Spent by Compliance Status									
Compliant	4,650,279	8,911,631	7,431,233	5,153,668	4,798,819	6,098,658	6,728,362	4,000,237	3,190,334
Non-Compliant	6,130,837	7,531,306	6,546,017	4,564,051	7,348,443	7,463,820	10,290,828	8,740,727	7,498,605
Pending Documentation	6,464,510	8,403,542	4,591,013	7,060,102	7,954,318	5,978,420	4,480,729	4,390,161	4,254,076
Under Review	7,985,915	2,871,957	6,233,659	6,625,614	8,573,574	5,665,351	8,440,596	7,890,998	6,249,379
Amount Awarded by Type									
No	38,289,074	36,747,373	36,077,885	37,045,215	33,980,576	47,814,827	33,628,606	34,960,146	38,290,845
Partially	28,918,227	34,492,110	36,473,089	22,565,997	38,972,946	28,645,144	47,822,679	37,287,228	36,703,540
Yes	35,635,551	38,093,881	37,864,712	34,596,598	32,941,893	35,636,542	31,516,425	31,988,596	28,036,634
Amount Spent by Type									
No	9,778,061	10,545,624	6,995,487	9,533,502	7,249,594	10,136,407	8,358,586	8,041,034	6,504,526
Partially	8,547,723	8,296,424	9,015,210	6,632,283	12,833,148	7,626,912	14,576,153	11,656,460	8,604,697
Yes	7,082,757	8,893,388	8,791,225	7,257,650	8,552,612	7,392,930	9,005,776	7,124,629	6,085,171
MEMBERS									
DONORS									
VOLUNTEERS									
Rolling Trend Info									

V04_R06a - Comparative Report - Grants

This report allows managers to effortlessly compare grant awards across grants, grant managers and by grant type. It displays figures for both the current month and year-to-date, along with variances compared to the previous year.

Comparative Report - Grant Amount Awarded Entity: SUS - Corporate US September 30, 2025									
Description	CURRENT PERIOD				YEAR TO DATE				
	Sep-2025 Actual	Sep-2024 Actual (Y)	Actual Var (N/Y)	Actual Var % (N/Y)	Sep-2025 Actual	Sep-2024 Actual (Y)	Actual Var (N/Y)	Actual Var % (N/Y)	
By Grant									
G013 Wildlife Conservation Effort	4,709,096	3,982,014	727,082	▲15.45%	29,998,359	27,192,679	2,805,680	10.32%	
G009 Agricultural Innovation	4,608,945	1,021,838	3,587,107	▲77.83%	25,721,285	22,624,842	3,096,443	13.69%	
G015 Disaster Relief Fund	3,524,879	3,364,609	160,270	▲4.55%	21,947,303	22,352,518	(405,215)	(1.81%)	
G010 Mental Health Services	2,938,075	1,971,225	966,850	▲49.05%	24,049,761	22,730,295	1,319,466	5.81%	
G005 Community Arts Development	2,920,641	1,514,406	1,406,235	▲88.15%	20,220,889	20,084,342	146,547	0.73%	
G008 Public Safety Enhancement	2,669,036	4,014,880	(1,345,844)	▼33.03%	24,994,461	22,448,044	2,546,417	11.34%	
G011 Literacy Expansion Project	2,616,724	1,896,647	720,077	▲37.99%	25,540,006	25,352,533	187,473	0.74%	
G001 Rural Education Initiative	2,457,377	2,879,995	(422,618)	▼14.68%	19,443,025	23,615,561	(4,172,536)	(17.67%)	
G003 Clean Water Project	2,184,706	2,513,611	(328,905)	▼12.9%	20,487,107	22,888,051	(2,400,944)	(10.49%)	
G007 Youth Mentorship Program	2,179,665	3,005,852	(826,187)	▼27.48%	21,739,665	25,785,491	(4,045,826)	(15.69%)	
G019 Food Security Campaigns	1,766,099	2,457,629	(691,530)	▼28.14%	17,660,999	25,341,406	(7,680,407)	(43.72%)	
G006 Renewable Energy Study	1,700,281	1,463,767	236,514	▲16.16%	18,456,745	28,231,477	(9,774,732)	(53.39%)	
G017 Workforce Training Program	1,687,095	4,075,415	(2,388,320)	▼58.6%	17,817,110	22,815,677	(5,000,567)	(22.35%)	
G018 Cultural Heritage Preservation	1,266,480	2,432,158	(1,165,678)	▼47.92%	12,664,800	20,351,448	(7,686,648)	(60.37%)	
G002 Urban Health Outreach	1,193,259	1,494,665	(301,406)	▼20.16%	21,914,487	19,540,217	2,374,270	12.15%	
G020 Infrastructure Upgrade Grant	889,215	2,375,473	(1,486,258)	▼62.61%	8,892,115	22,815,677	(13,923,562)	(61.03%)	
G014 Technology Access Initiative	866,645	1,466,050	(599,405)	▼40.9%	16,204,832	22,889,844	(6,685,012)	(33.58%)	
G016 Senior Care Improvement	840,308	2,973,532	(2,133,224)	▼71.75%	27,993,305	22,938,270	5,055,035	22.03%	
G004 STEM Research Program	830,183	3,019,699	(2,189,516)	▼72.53%	27,701,728	27,159,655	542,073	1.99%	
G012 Homeless Support Network	827,635	1,458,145	(630,510)	▼43.24%	18,330,868	22,558,002	(4,227,134)	(18.74%)	
TOTAL AMOUNT AWARDED	42,676,944	49,383,610	(6,706,666)	▼13.58%	454,782,609	454,978,237	(195,628)	(0.04%)	
By Grant Manager									
Lisa Potomislard	2,676,944	1,255,000	1,421,944	▲113.12%	8,435,900	7,499,000	936,900	12.49%	

V04_R07a - Exception Report - Grants

The Exception Report provides users with a swift and effective method for identifying significant variances or major differences between actual figures and those from the previous year (or budget). Users can sort the data in ascending or descending order by clicking the column headers.

Exception Report - Grants - Amount Awarded Entity: SUS - Corporate US For Period Ending September 30, 2025									
Sort on Variance and Variance % columns to see the largest/smallest variances									
Grant ID	Grant Description	CURRENT PERIOD				YEAR TO DATE			
		Sep-25 Actual	Sep-24 Actual (Y)	Actual Var (N/Y)	Actual Var % (N/Y)	Sep-25 Actual	Sep-24 Actual (Y)	Actual Var (N/Y)	Actual Var % (N/Y)
G001	Rural Education Initiative	2,457,377	2,879,995	(422,618)	▼14.68%	2,457,377	19,443,025	23,615,561	(4,172,536)
G002	Urban Health Outreach	1,193,259	1,494,665	(301,406)	▼20.16%	1,193,259	21,914,487	19,540,217	2,374,270
G003	Clean Water Project	2,184,706	2,513,611	(328,905)	▼15.1%	2,184,706	20,487,107	22,888,051	(2,400,944)
G004	STEM Research Program	830,183	3,019,699	(2,189,516)	▼72.53%	830,183	27,701,728	27,159,655	542,073
G005	Community Arts Development	2,920,641	1,514,406	1,406,235	▲88.15%	2,920,641	20,220,889	20,084,342	146,547
G006	Renewable Energy Study	1,700,281	1,463,767	236,514	▲16.16%	1,700,281	18,456,745	28,231,477	(9,774,732)
G007	Youth Mentorship Program	2,179,665	3,005,852	(826,187)	▼27.48%	2,179,665	25,785,491	22,544,006	3,241,485
G008	Public Safety Enhancement	2,669,036	4,014,880	(1,345,844)	▼33.03%	2,669,036	24,994,461	22,448,044	2,546,417
G009	Agricultural Innovation	4,608,945	1,021,838	3,587,107	▲77.83%	4,608,945	25,721,285	21,624,842	4,096,443
G010	Mental Health Services	2,938,075	1,971,225	966,850	▲49.05%	2,938,075	24,049,761	21,730,295	2,319,466
G011	Literacy Expansion Project	2,616,724	1,896,647	720,077	▲37.99%	2,616,724	25,540,006	25,352,533	187,473
G012	Homeless Support Network	827,635	1,458,145	(630,510)	▼43.24%	827,635	18,330,868	22,558,002	(4,227,134)
G013	Wildlife Conservation Effort	4,709,096	3,982,014	727,082	▲18.26%	4,709,096	29,998,359	27,192,679	2,805,680
G014	Technology Access Initiative	866,645	1,466,050	(599,405)	▼40.9%	866,645	16,204,832	22,889,844	(6,685,012)
G015	Disaster Relief Fund	3,524,879	3,364,609	160,270	▲4.55%	3,524,879	21,947,303	22,352,518	(405,215)
G016	Senior Care Improvement	840,308	2,973,532	(2,133,224)	▼71.75%	840,308	27,993,305	22,938,270	5,055,035
G017	Workforce Training Program	1,687,095	4,075,415	(2,388,320)	▼58.6%	1,687,095	22,229,036	22,772,748	(543,712)
G018	Cultural Heritage Preservation	1,266,480	2,432,158	(1,165,678)	▼47.92%	1,266,480	12,664,800	20,351,448	(7,686,648)
G019	Food Security Campaigns	1,766,099	2,457,629	(691,530)	▼28.14%	1,766,099	25,341,406	21,337,998	4,003,408
G020	Infrastructure Upgrade Grant	889,215	2,375,473	(1,486,258)	▼62.61%	889,215	17,817,110	22,815,677	(5,000,567)

Member Reports

V04_R01b - Transaction Detail - Members

This report allows users to track member information with detailed insights. Each column displays a member field, and the user can filter the report by member at run-time.

Member Detail

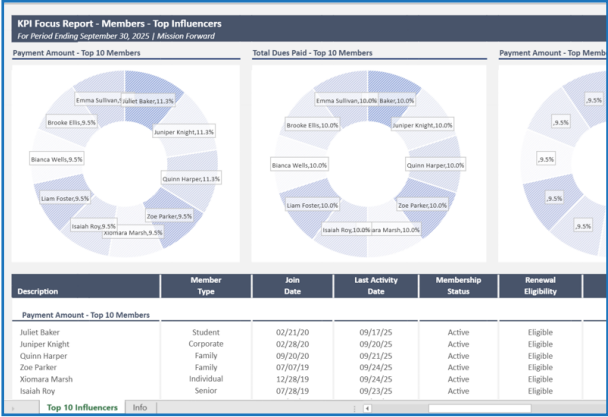
As of Period September 30, 2025 | Mission Forward

Member ID	Member Name	Member Type	Membership Status	Join Date	Last Activity Date	Payment Date	Renewal Date	Renewal Eligibility
M1101	Willis Evans	Senior	Cancelled	4/13/2017	10/07/2025	9/10/2025	9/14/2025	Eligible
M1104	Zane Brooks	Individual	Cancelled	11/24/2020	9/29/2025	9/18/2025	9/13/2025	Eligible
M1105	Abigail Shaw	Student	Cancelled	11/3/2015	10/24/2025	9/26/2025	9/21/2025	Eligible
M1115	Katie Harper	Student	Lapsed	9/20/2016	10/09/2025	9/14/2025	9/9/2025	Eligible
M1121	Quincy Hill	Individual	Cancelled	2/25/2017	9/28/2025	9/25/2025	9/20/2025	Eligible
M1124	Talia Murphy	Individual	Cancelled	8/15/2015	10/10/2025	9/13/2025	9/8/2025	Eligible
M1127	Wyatt Young	Family	Lapsed	8/8/2015	9/26/2025	9/4/2025	8/30/2025	Eligible
M1130	Zelda Perry	Individual	Lapsed	8/9/2015	9/20/2025	9/18/2025	9/13/2025	Eligible
M1131	Archer Gordon	Corporate	Lapsed	5/15/2015	9/29/2025	9/3/2025	8/29/2025	Eligible
M1134	Delliah Myers	Senior	Active	1/22/2018	9/3/2025	9/2/2025	8/28/2025	Eligible
M1135	Enna Hart	Senior	Active	8/7/2019	10/3/2025	9/18/2025	9/13/2025	Eligible
M1136	Faith Kelly	Corporate	Cancelled	4/8/2017	10/4/2025	9/23/2025	9/18/2025	Eligible
M1139	Isaiah Roy	Senior	Active	7/18/2019	10/7/2025	9/23/2025	9/18/2025	Eligible
M1140	Juliet Baker	Student	Active	2/21/2020	9/29/2025	9/17/2025	9/12/2025	Eligible
M1143	Milo West	Individual	Cancelled	3/26/2016	9/19/2025	9/8/2025	9/3/2025	Not Eligible
M1143	Milo Hoan	Student	Cancelled	5/3/2016	10/15/2025	9/29/2025	9/24/2025	Not Eligible
M1143	Misner West	Student	Cancelled	10/4/2017	9/20/2025	9/17/2025	9/12/2025	Not Eligible
M1146	Poppy Soto	Corporate	Cancelled	1/14/2017	10/1/2025	9/20/2025	9/15/2025	Not Eligible
M1153	Wesley Hunt	Family	Active	2/4/2018	10/24/2025	9/26/2025	9/21/2025	Eligible
M1154	Xiomara Marsh	Individual	Active	12/18/2019	10/7/2025	9/24/2025	9/19/2025	Eligible
M1156	Zilly Dean	Individual	Lapsed	3/6/2019	9/30/2025	9/26/2025	9/21/2025	Not Eligible
M1156	Zion Dean	Senior	Active	11/11/2016	9/10/2025	9/4/2025	8/30/2025	Eligible
M1243	Israel Brooks	Family	Cancelled	4/5/2015	9/18/2025	9/7/2025	9/2/2025	Not Eligible

Grand Total

V04_R03b - Top 10 Report - Members

This visual report features three top ten lists, each represented by a pie chart: 1) Top members by payment amount, 2) Top members by total dues paid, and 3) Top member types (student, individual, family, corporate, etc.) by amount spent. The data table below the charts includes totals and the top members/types as a % of all payments.



V04_R04 - 13 Month Rolling Trend - Nonprofit Metrics

This report provides a summarized view of: Payment amount by membership status (active, cancelled, lapsed, etc.) and payment by membership type. The columns display a rolling thirteen-month period. The report template comes with sections for grants, members, donors and volunteers and those that don't apply can easily be removed or replaced.

13 Month Rolling Trend

As of Period September 30, 2024 | Corporate US

Metric	Sep-24 Actual	Oct-24 Actual	Nov-24 Actual	Dec-24 Actual	Jan-25 Actual	Feb-25 Actual	Mar-25 Actual	Apr-25 Actual	May-25 Actual	Jun-25 Actual
GRANTS										
MEMBERS										
Payment Amount by Membership Status										
Active	11,928	14,097	11,300	10,528	18,146	12,142	14,175	17,760	12,936	14,142
Cancelled	13,632	14,478	18,532	15,792	13,082	17,279	20,475	11,988	16,072	17,142
Lapsed	17,040	9,525	15,368	11,280	10,972	17,279	17,850	14,052	10,192	14,142
Payment Amount by Membership Type										
Corporate	8,520	7,239	9,040	6,016	8,440	12,609	10,500	6,660	6,664	9,142
Family	6,816	6,858	10,848	9,024	7,596	10,741	7,875	10,212	5,880	6,142
Individual	10,650	8,382	9,492	8,648	6,330	4,203	11,550	9,324	12,152	9,142
Senior	4,686	7,239	8,588	9,400	8,440	11,675	11,550	11,100	7,840	8,142
Student	11,928	8,382	7,232	4,512	11,394	7,472	11,025	7,104	6,664	11,142
DONORS										
VOLUNTEERS										

V04_R06b - Comparative Report - Members

This report allows managers to effortlessly compare payments by membership type and membership status. It displays figures for both the current month and year-to-date, along with variances compared to the previous year.

Comparative Report - by Payment Amount						
Entity: SUS - Mission Forward						
September 30, 2025						
Description	CURRENT PERIOD				Sep - 2025 Actual	Sep - 2024 Actual
	Sep - 2025 Actual	Sep - 2024 Actual (Y)	Actual Var (YoY)	Actual Var % (YoY)		
By Member Type						
Family	8,594	6,816	1,778	▲20.69%	67,594	
Individual	6,440	10,650	(4,210)	▼65.37%	76,887	
Student	5,320	11,928	(6,608)	▼124.21%	75,587	
Senior	5,040	4,686	354	▲7.02%	79,354	
Corporate	9,400	8,520	880	▲9.36%	70,878	
TOTAL PAYMENTS	34,794	42,600	(7,806)	▼22.43%	370,300	
By Membership Status						
Active	9,800	11,928	(2,128)	▼21.71%	123,470	
Lapsed	19,377	17,040	2,337	▲12.06%	118,652	
Cancelled	14,559	13,632	927	▲6.37%	128,178	
TOTAL PAYMENTS	43,736	42,600	1,136	▲2.60%	370,300	

V04_R07b - Exception Report - Members

The Exception Report provides users with a swift and effective method for identifying significant variances or major differences between actual figures and those from the previous year (or budget). Users can sort the data in ascending or descending order by clicking the column headers.

Exception Report - Members - Payments									
Entity: SUS - Mission Forward									
For Period Ending September 30, 2025									
Sort on Variance and Variance % columns to see the largest/smallest variances									
Member ID	Member Name	CURRENT PERIOD				YEAR TO DATE			
		Sep-25 Actual	Sep-24 Actual (Y)	Actual Var (YoY)	Actual Var % (YoY)	Sep-25 Actual	Sep-24 Actual (Y)	Actual Var (YoY)	Actual Var % (YoY)
M1156	Zion Dean	118		118	-	419	283		
M1143	Milo West	97		97	-	186	364		
M1095	Quade Silva	91		91	-	356	116		
M1008	Henry Brooks	78		78	-	227	134		
M1227	Seth Vega	75		75	-	152	397		
M1174	Bony Brooks	75		75	-	372	111		
M1183	Alana Cruz	68		68	-	470	100		
M1164	Holden Cole	68		68	-	266	44		
M1013	Mia Henderson	66	107	(41)	▼62.12%	114	310		
M1039	Madison Bell	66		66	-	102	135		
M1096	Ruby Hart	63		63	-	324	50		
M1104	Zane Brooks	56	47	9	▲16.07%	56	113		
M1222	Nina Hunt	56	107	(51)	▼41.07%	160	212		
M1197	Omar Young	56	118	(62)	▼51.71%	348	368		
M1017	Quinn Harper	56		56	-	392	380		
M1218	Juniper Knight	56		56	-	146	94		
M1211	Collette Long	56		56	-	130	66		
M1015	Olivia Stewart	56		56	-	337	96		
M1140	Juliet Baker	56		56	-	211			
M1004	Hunter Reed	47		47	-	86	243		
M1139	Isaiah Roy	47		47	-	143	343		
M1054	Brooke Ellis	47	71	(24)	▼51.06%	125	221		
M1011	Kara Mitchell	47	214	(167)	▼85.52%	230	383		
M1053	Aiden Murphy	47	53	(6)	▼12.77%	188	310		
M1052	Zoe Parker	47	53	(6)	▼12.77%	194	238		

Donor Reports

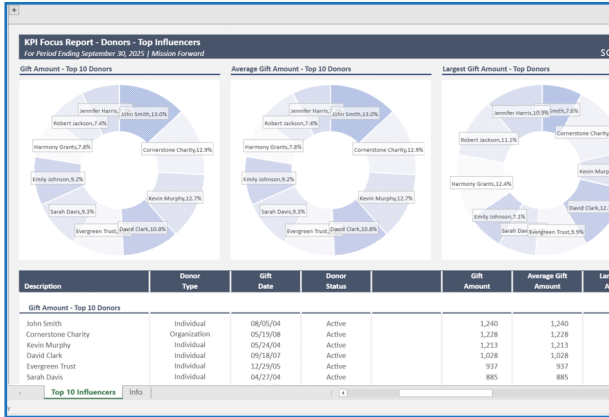
V04_R01c - Transaction Detail - Donors

This report allows users to track donors with detailed insights. Each column displays a donor field, while a comprehensive grand total is presented at the bottom, providing a clear summary.

Donor Detail							
YTD As of Period September 30, 2025 Mission Forward							
Donor ID	Donor Description	Donor Status	Donor Type	Gift Date	Gift Amount	Largest Gift Amount	Total Gift Amount
DNR0049	Christine Kim	Active	Individual	9/7/2025	144	1,623	6,201
DNR0051	Unity Foundation	Active	Individual	9/6/2025	584	5,517	12,320
DNR0052	Amanda Foster	Active	Individual	9/26/2025	159	2,394	6,207
DNR0053	Peter Hughes	Active	Individual	9/9/2025	141	2,499	6,158
DNR0055	Rebecca Bennett	Active	Individual	9/28/2025	648	5,016	18,750
DNR0057	Visionary Donors	Active	Individual	9/26/2025	691	3,599	12,486
DNR0059	Kevin Murphy	Active	Individual	9/17/2025	1,556	3,459	12,237
DNR0060	Pathway Grants	Active	Individual	9/16/2025	617	2,322	6,173
DNR0061	Catherine Long	Active	Organization	9/23/2025	681	5,763	12,557
DNR0062	Samuel Green	Active	Organization	9/25/2025	442	3,972	12,687
DNR0063	Lighthouse Fund	Active	Organization	9/19/2025	629	3,217	12,742
DNR0064	Angela Stewart	Active	Organization	9/30/2025	871	3,930	12,840
DNR0065	Richard Ortiz	Active	Organization	9/17/2025	498	2,189	5,978
DNR0068	Joseph Diaz	Active	Organization	9/18/2025	1,166	6,915	18,727
DNR0069	Solidarity Network	Active	Organization	9/27/2025	168	1,485	6,209
DNR0070	Lauren Baker	Active	Organization	9/17/2025	472	4,419	12,630
DNR0072	Cornerstone Charity	Active	Organization	9/27/2025	1,228	3,063	6,141
DNR0073	Stephanie Cook	Active	Organization	9/3/2025	617	4,966	12,903
DNR0074	Eric Sanders	Active	Organization	9/23/2025	221	1,544	6,174
DNR0075	Oasis Support Group	Active	Organization	9/21/2025	232	2,344	6,497
DNR0076	Melissa Flores	Active	Organization	9/10/2025	253	2,325	6,330
DNR0077	Jonathan Reed	Active	Organization	9/27/2025	143	1,744	6,022
DNR0079	Kimberly Hayes	Active	Organization	9/28/2025	717	4,513	12,402
Grand Total					34,179	218,895	625,175
2,671							

V04_R03c - Top 10 Report - Donors

This visual report features three top ten lists, each represented by a pie chart: 1) Top donors by gift amount, 2) Top donors by average gift amount, and 3) Top donors by largest gift amount. The data table below the charts includes totals and % of total donations from all donors.



V04_R04 - 13 Month Rolling Trend - Nonprofit Metrics

This report provides a summarized view of: Gift amount by donor status (active, inactive, etc.) and gift amount by donor type (individual, corporate, organization, etc.). The columns display a rolling thirteen-month period. The report template comes with sections for grants, members, donors and volunteers and those that don't apply can easily be removed or replaced.

13 Month Rolling Trend												
As of Period Ending September 30, 2025 Corporate US												
Metric	Sep-24 Actual	Oct-24 Actual	Nov-24 Actual	Dec-24 Actual	Jan-25 Actual	Feb-25 Actual	Mar-25 Actual	Apr-25 Actual	May-25 Actual	Jun-25 Actual	Jul-25 Actual	Aug-25 Actual
GRANTS												
MEMBERS												
DONORS												
Gift Amount by Donor Status												
Active	510,765	573,178	514,057	461,271	408,571	466,231	526,052	425,875	475,127	413,259	470,512	470,512
Inactive	424,341	418,541	371,028	359,378	318,444	354,832	420,891	319,809	393,781	313,172	353,172	353,172
Organization	86,423	154,638	143,029	101,894	90,126	111,399	105,161	106,066	81,346	100,087	117,411	117,411
VOLUNTEERS												
Hours by Volunteer Status												
Active	7,904	8,279	8,470	7,679	10,830	7,191	10,211	9,334	9,211	9,094	8,470	8,470
Inactive	9,029	10,311	10,012	11,292	9,572	12,053	10,587	11,324	11,317	11,096	13,172	13,172
On Hold	6,294	6,901	5,476	6,192	5,042	6,573	5,382	6,865	7,436	7,411	6,470	6,470
Hours by Volunteer Type												
Board Member	5,992	5,920	6,967	7,189	7,167	7,893	8,445	8,195	7,515	9,804	9,470	9,470
Intern	5,288	7,741	7,501	7,556	8,273	6,064	8,187	7,082	6,060	6,548	6,470	6,470
One-Time	8,219	7,719	3,943	5,064	5,768	6,184	6,841	4,497	8,710	6,025	9,470	9,470
Regular	3,728	4,071	5,947	5,354	4,336	5,676	2,707	7,749	5,699	5,224	3,728	3,728

V04_R06c - Comparative Report - Donors

This report allows managers to effortlessly compare donations by individual donor, donor status and type. It displays figures for both the current month and year-to-date, along with variances compared to the previous year.

Comparative Report - by Gift Amount												
Entity: SUS - Mission Forward												
September 30, 2025												
Description	CURRENT PERIOD						YEAR TO DATE					
	Sep-2025 Actual	Sep-2024 Actual	Sep-2024 Var	Sep-2024 Var %	Sep-2024 Var %	Sep-2024 Var %	Sep-2025 Actual	Sep-2024 Actual	Sep-2024 Var	Sep-2024 Var %	Sep-2024 Var %	Sep-2024 Var %
DNR0045 Compass Giving	276	212	64	30.19%	30.19%	30.19%	1,813	1,132	681	60.15%	60.15%	60.15%
DNR0076 Melissa Flores	253	384	(131)	(51.74%)	(51.74%)	(51.74%)	3,187	4,204	(1,017)	(24.43%)	(24.43%)	(24.43%)
DNR0075 Onco Support Group	232	232	0	0.00%	0.00%	0.00%	1,539	1,539	0	0.00%	0.00%	0.00%
DNR0035 Henry Scott	232	533	(301)	(52.04%)	(52.04%)	(52.04%)	1,969	3,684	(1,715)	(46.55%)	(46.55%)	(46.55%)
DNR0074 Eric Sanders	221	106	115	52.04%	52.04%	52.04%	1,408	2,785	(1,377)	(49.44%)	(49.44%)	(49.44%)
DNR0046 Diane Roberts	173	440	(267)	(54.34%)	(54.34%)	(54.34%)	1,157	3,789	(2,632)	(72.10%)	(72.10%)	(72.10%)
DNR0038 Paul Mitchell	168	101	67	39.88%	39.88%	39.88%	2,330	2,913	(583)	(20.01%)	(20.01%)	(20.01%)
DNR0069 Solidarity Network	168	167	1	0.60%	0.60%	0.60%	2,448	2,465	(17)	(0.69%)	(0.69%)	(0.69%)
DNR0024 Riverbank Foundation	160	540	(380)	(68.52%)	(68.52%)	(68.52%)	1,071	4,439	(3,368)	(75.65%)	(75.65%)	(75.65%)
DNR0052 Amanda Foster	159	222	(63)	(30.62%)	(30.62%)	(30.62%)	2,181	1,256	925	73.65%	73.65%	73.65%
DNR0040 Elizabeth Allen	154	157	(3)	(1.95%)	(1.95%)	(1.95%)	2,457	3,023	(566)	(22.02%)	(22.02%)	(22.02%)
DNR0049 Christine Kim	144	117	27	18.75%	18.75%	18.75%	1,660	1,660	0	0.00%	0.00%	0.00%
DNR0077 Jonathan Reed	143	154	(11)	(7.19%)	(7.19%)	(7.19%)	4,900	2,855	2,045	71.64%	71.64%	71.64%
DNR0053 Peter Hughes	141	198	(57)	(40.43%)	(40.43%)	(40.43%)	3,377	1,522	1,855	122.53%	122.53%	122.53%
DNR0017 Thomas Adams	140	323	(177)	(54.80%)	(54.80%)	(54.80%)	1,701	1,108	593	53.52%	53.52%	53.52%
TOTAL GIFT AMOUNT	34,179	27,538	6,641	19.43%	19.43%	19.43%	234,062	276,996	(42,934)	(15.50%)	(15.50%)	(15.50%)
By Status												
Active	34,179	27,538	6,641	19.43%	19.43%	19.43%	234,062	276,996	(42,934)	(15.50%)	(15.50%)	(15.50%)
TOTAL GIFT AMOUNT	34,179	27,538	6,641	19.43%	19.43%	19.43%	234,062	276,996	(42,934)	(15.50%)	(15.50%)	(15.50%)
By Type												
Individual	25,841	21,711	4,130	19.02%	19.02%	19.02%	181,788	207,193	(25,405)	(12.26%)	(12.26%)	(12.26%)
Organization	8,338	5,827	2,511	30.12%	30.12%	30.12%	52,274	69,803	(17,529)	(25.12%)	(25.12%)	(25.12%)
TOTAL GIFT AMOUNT	34,179	27,538	6,641	19.43%	19.43%	19.43%	234,062	276,996	(42,934)	(15.50%)	(15.50%)	(15.50%)

V04_R07c - Exception Report - Donors

The Exception Report provides users with a swift and effective method for identifying significant variances or major differences between actual figures and those from the previous year (or budget). Users can sort the data in ascending or descending order by clicking the column headers.

Exception Report - Donors - Gift Amount												
Entity: SUS - Mission Forward												
For Period Ending September 30, 2025												
Sort on Variance and Variance % columns to see the largest/smallest variances												
Donor ID	Donor Name	CURRENT PERIOD						YEAR TO DATE				
		Sep-2025 Actual	Sep-2024 Actual	Sep-2024 Var	Sep-2024 Var %	Sep-2024 Var %	Sep-2024 Var %	Sep-2025 Actual	Sep-2024 Actual	Sep-2024 Var	Sep-2024 Var %	Sep-2024 Var %
DNR0004 Michael Brown	112	888	(776)	(692.86%)	(692.86%)	(692.86%)	(692.86%)	2,580	3,936	(1,356)	(34.45%)	(34.45%)
DNR0024 Riverbank Foundation	160	540	(380)	(70.37%)	(70.37%)	(70.37%)	(70.37%)	2,071	3,439	(1,368)	(39.80%)	(39.80%)
DNR0046 Diane Roberts	173	440	(267)	(54.34%)	(54.34%)	(54.34%)	(54.34%)	3,137	3,789	(652)	(17.21%)	(17.21%)
DNR0032 George Phillips	357	883	(526)	(59.57%)	(59.57%)	(59.57%)	(59.57%)	4,101	5,477	(1,376)	(25.12%)	(25.12%)
DNR0035 Henry Scott	232	533	(301)	(52.04%)	(52.04%)	(52.04%)	(52.04%)	1,969	3,684	(1,715)	(46.55%)	(46.55%)
DNR0017 Thomas Adams	140	315	(175)	(125.00%)	(125.00%)	(125.00%)	(125.00%)	1,701	1,108	593	(53.52%)	(53.52%)
DNR0034 Olivia Carter	704	1,560	(856)	(54.86%)	(54.86%)	(54.86%)	(54.86%)	3,132	3,586	(454)	(12.66%)	(12.66%)
DNR0076 Melissa Flores	253	384	(131)	(31.78%)	(31.78%)	(31.78%)	(31.78%)	3,187	4,204	(1,017)	(24.43%)	(24.43%)
DNR0043 LightHouse Fund	429	929	(500)	(53.82%)	(53.82%)	(53.82%)	(53.82%)	2,401	2,101	300	(14.28%)	(14.28%)
DNR0043 Jessica Parker	392	564	(172)	(43.88%)	(43.88%)	(43.88%)	(43.88%)	2,653	3,904	(1,251)	(32.04%)	(32.04%)
DNR0053 Peter Hughes	141	198	(57)	(40.43%)	(40.43%)	(40.43%)	(40.43%)	3,377	1,522	1,855	(122.53%)	(122.53%)
DNR0045 Compass Giving	159	222	(63)	(30.62%)	(30.62%)	(30.62%)	(30.62%)	2,181	1,256	925	(73.65%)	(73.65%)
DNR0039 Sunrise Charities	587	819	(232)	(39.52%)	(39.52%)	(39.52%)	(39.52%)	2,699	5,953	(3,254)	(54.50%)	(54.50%)
DNR0006 XYZ Corporation	222	263	(41)	(18.44%)	(18.44%)	(18.44%)	(18.44%)	3,729	3,305	424	(12.83%)	(12.83%)
DNR0045 Compass Giving	276	322	(46)	(16.67%)	(16.67%)	(16.67%)	(16.67%)	3,811	7,132	(3,321)	(46.58%)	(46.58%)
DNR0077 Jonathan Reed	143	154	(11)	(7.19%)	(7.19%)	(7.19%)	(7.19%)	4,900	2,855	2,045	(71.64%)	(71.64%)
DNR0030 Starlight Collective	971	(971)	0	0.00%	0.00%	0.00%	0.00%	3,706	3,544	162	(4.57%)	(4.57%)
DNR0037 Sophia Rodriguez	621	(621)	0	0.00%	0.00%	0.00%	0.00%	2,819	2,932	(113)	(3.85%)	(3.85%)
DNR0047 Andrew Gray	673	(673)	0	0.00%	0.00%	0.00%	0.00%	2,564	2,069	495	(24.41%)	(24.41%)
DNR0048 New Horizons Org	281	(281)	0	0.00%	0.00%	0.00%	0.00%	2,632	4,999	(2,367)	(47.35%)	(47.35%)
DNR0050 Mark Sullivan	272	(272)	0	0.00%	0.00%	0.00%	0.00%	1,400	5,727	(4,327)	(75.55%)	(75.55%)
DNR0058 Julia Perry	113	(113)	0	0.00%	0.00%	0.00%	0.00%	1,701	3,109	(1,408)	(45.29%)	(45.29%)
DNR0071 Christopher Ross	917	(917)	0	0.00%	0.00%	0.00%	0.00%	3,944	3,996	(52)	(1.30%)	(1.30%)
DNR0040 Matthew Coleman	828	(828)	0	0.00%	0.00%	0.00%	0.00%	3,943	3,814	129	(3.38%)	(3.38%)

Volunteer Reports

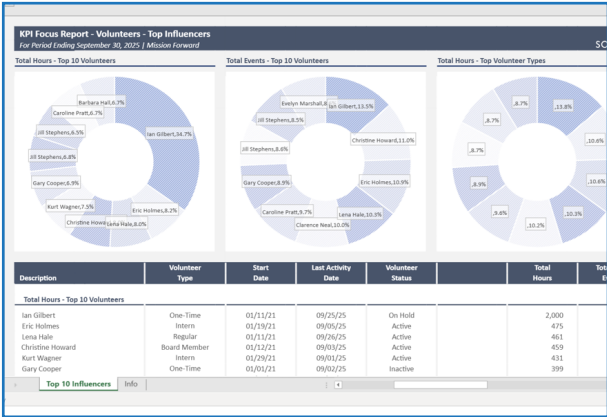
V04_R01d - Transaction Detail - Volunteers

This report allows users to track their volunteers with detailed insights. Each column displays a volunteer data field, while a comprehensive grand total for volunteer hours presented at the bottom, providing a clear summary.

Volunteer Detail							
YTD As of Period September 30, 2025 Corporate US							
Volunteer ID	Volunteer Name	Volunteer Status	Volunteer Type	Start Date	Last Activity Date	Total Hours	Total Events
V0184	Jill Stephens	Inactive	Board Member	1/7/2021	9/17/2025	176	
V0186	Lena Hale	Active	Regular	1/11/2021	9/26/2025	461	
V0187	Troy Burgess	Active	Regular	1/8/2021	9/13/2025	354	
V0190	Vicki Larson	Inactive	Intern	1/6/2021	9/22/2025	194	
V0198	Kristen Bush	Active	Board Member	1/6/2021	9/15/2025	211	
V0200	Ragina Cuhin	Active	One-Time	1/15/2021	9/23/2025	321	
V0201	Herman Steele	Active	Board Member	1/18/2021	9/18/2025	361	
V0209	Gilbert Norman	On Hold	Board Member	1/11/2021	9/15/2025	242	
V0209	Gilbert Norman	On Hold	Board Member	1/11/2021	9/27/2025	258	
V0210	Tricia Floyd	Inactive	One-Time	1/1/2021	9/10/2025	271	
V0215	Archie Keller	Active	Board Member	1/6/2021	9/29/2025	283	
V0216	Michelle Lyons	Active	One-Time	1/7/2021	9/19/2025	323	
V0224	Renee Carr	Active	Intern	1/1/2021	9/12/2025	242	
V0230	Loretta Wise	Inactive	Regular	1/21/2021	9/11/2025	274	
V0232	Tanya Quinn	Active	Board Member	1/18/2021	9/28/2025	273	
V0237	Isaac Moody	Inactive	One-Time	1/5/2021	9/23/2025	228	
V0239	Lester Klein	Inactive	Regular	1/13/2021	9/21/2025	314	
V0241	Ross Norton	Active	One-Time	1/13/2021	9/12/2025	274	
V0246	Sue Harmon	Active	One-Time	1/2/2021	9/22/2025	351	
V0246	Sue Harmon	Active	One-Time	1/2/2021	9/5/2025	369	
V0248	Ethel Floyd	Inactive	Intern	1/10/2021	9/15/2025	236	
V0250	Clara Barton	Active	Intern	1/9/2021	9/17/2025	342	
Grand Total						29475	

V04_R03d - Top 10 Report - Volunteers

This visual report features three top ten lists, each represented by a pie chart: 1) Top volunteers by hours, 2) Top volunteers by event count, and 3) Top volunteers by type (One-time, intern, regular, etc.). The data table below the charts includes totals and % of total hours for all volunteers.



V04_R04 - 13 Month Rolling Trend - Nonprofit Metrics

This report provides a summarized view of: Hours by volunteer status (active, inactive, on hold, etc.) and hours by volunteer type, and Amount spent by type. The columns display a rolling thirteen-month period.

13 Month Rolling Trend												
As of Period September 30, 2024 Corporate US												
Metric	Sep-24 Actual	Oct-24 Actual	Nov-24 Actual	Dec-24 Actual	Jan-25 Actual	Feb-25 Actual	Mar-25 Actual	Apr-25 Actual	May-25 Actual	Jun-25 Actual	Jul-25 Actual	Aug-25 Actual
GRANTS												
MEMBERS												
DONORS												
VOLUNTEERS												
Hours by Volunteer Status												
Active	7,904	8,239	8,870	7,679	10,930	7,191	10,211	9,334	9,211	9,094	8,419	13,698
Inactive	9,029	10,311	10,012	11,292	9,572	12,053	10,587	11,324	11,337	11,096	13,986	9,999
On Hold	6,294	6,901	5,476	6,192	5,042	6,573	5,382	6,865	7,436	7,411	6,882	4,772
Hours by Volunteer Type												
Board Member	5,992	5,920	6,967	7,189	7,167	7,893	8,445	8,195	7,515	9,804	9,470	9,677
Intern	5,288	7,741	7,501	7,556	8,273	6,064	8,187	7,082	6,060	6,548	6,112	6,588
One-Time	8,219	7,719	3,943	5,064	5,768	6,184	6,841	4,497	8,710	6,025	9,968	5,544
Regular	3,728	4,071	5,947	5,354	4,336	5,876	2,707	7,749	5,699	5,224	3,737	6,660



V04_R06d - Comparative Report - Volunteers

This report allows managers to effortlessly compare volunteer hours by volunteer type and status. It displays figures for both the current month and year-to-date, along with variances compared to the previous year.

Comparative Report - by Hours Volunteered									
Entity: SUS - Mission Forward									
September 30, 2025									
Description	CURRENT PERIOD				YEAR TO DATE			Actual	Var (%)
	Sep - 2025 Actual	Sep - 2024 Actual (\$)	Actual Var (%)	Actual Var (\$)	Sep - 2025 Actual	Sep - 2024 Actual (\$)	Actual Var (%)		
By Volunteer Type									
One-Time	8,398	8,219	179	▲2.13%	61,939	52,411	9,528	18.18%	18.18%
Intern	7,703	5,288	2,415	▲45.68%	62,611	47,538	15,073	27.62%	27.62%
Board Member	7,274	5,992	1,282	▲21.39%	70,435	58,170	12,265	17.29%	17.29%
Regular	6,100	3,728	2,372	▲63.63%	47,836	35,549	12,287	25.84%	25.84%
TOTAL HOURS	29,475	23,227	6,248	▲26.90%	247,821	195,668	52,153	21.44%	21.44%
By Volunteer Status									
Active	11,792	7,904	3,888	▲49.06%	89,868	67,097	22,771	25.74%	25.74%
Inactive	9,267	9,009	258	▲2.84%	99,219	75,221	23,998	24.05%	24.05%
On Hold	8,416	6,294	2,122	▲25.21%	58,734	52,350	6,384	12.16%	12.16%
TOTAL HOURS	29,475	23,227	6,248	▲26.90%	247,821	195,668	52,153	21.44%	21.44%
By Volunteer (Top 10 Names)									
V0149 Ian Gilbert	1,184	230	954	▲413.48%	1,947	846	1,101	130.14%	130.14%
V0184 Jill Stephens	769	769	0	0.00%	1,792	1,779	13	0.73%	0.73%
V0246 Sue Harmon	720	249	471	▲189.16%	2,556	1,275	1,281	100.47%	100.47%
V0084 Pamela Kelly	712	248	464	▲187.10%	1,669	938	731	77.93%	77.93%
V0072 Julie Carter	673	673	0	0.00%	1,616	518	1,098	211.97%	211.97%
V0091 Terry Hunter	670	670	0	0.00%	2,069	399	1,670	418.55%	418.55%
V0099 Harry Weaver	659	659	0	0.00%	1,396	434	962	221.66%	221.66%
V0078 Evelyn Marshall	605	605	0	0.00%	2,089	901	1,188	131.85%	131.85%
V0105 Arthur Lane	563	563	0	0.00%	828	877	-49	-5.83%	-5.83%
V0056 Amanda Hughes	561	189	372	▲196.85%	1,512	530	982	185.28%	185.28%
TOTAL HOURS	7,116	916	6,200	▲678.93%	17,474	8,485	8,989	105.93%	105.93%

V04_R07d - Exception Report - Volunteers

The Exception Report provides users with a swift and effective method for identifying significant variances or major differences between actual figures and those from the previous year (or budget). Users can sort the data in ascending or descending order by clicking the column headers.

Exception Report - Volunteers - Hours									
Entity: SUS - Mission Forward									
For Period Ending September 30, 2025									
Volunteer ID	Volunteer Name	Act vs Bud		Act vs Bud		YEAR TO DATE			
		Var (%)	Var (\$)	Var (%)	Var (\$)	Sep-25 Actual	Sep-24 Actual (\$)	Budget	Actual Var (%)
V0083 Gregory Knight		-	1,270	-	1,451	(181)			▼14.25%
V0037 Brian Stewart		-	578	-	650	(72)			▼12.46%
V0187 Tina Burgess	354	-	1,345	-	1,507	(163)			▼12.04%
V0127 Stanley Orits	-	-	1,151	-	1,277	(126)			▼10.95%
V0161 Martin Jensen	-	-	847	-	929	(82)			▼8.82%
V0200 Regina Cohen	321	-	1,503	-	1,612	(109)			▼7.25%
V0081 Bruce Gordon	358	-	1,040	-	1,112	(72)			▼6.52%
V0052 Diane Russell	-	-	826	-	876	(50)			▼6.05%
V0105 Arthur Lane	563	-	828	-	877	(49)			▼5.92%
V0064 Sandra Bennett	-	-	442	-	466	(24)			▼5.13%
V0185 Marc Robbins	-	-	339	-	354	(15)			▼4.23%
V0065 Philip Hayes	-	-	778	-	810	(32)			▼4.11%
V0219 Ruben Boone	-	-	1,268	-	1,303	(35)			▼2.76%
V0093 Louise Bryant	547	-	795	-	814	(19)			▼2.39%
V0177 Neil Goodman	331	-	967	-	985	(18)			▼1.86%
V0174 Nina Schwartz	-	-	1,320	-	1,342	(22)			▼1.67%
V0344 Brenda Hill	-	-	-	-	379	(379)			▲0.00%
V0054 Rebecca Ward	-	-	726	-	726	(726)			▲0.00%
V0214 Lynn Barber	-	-	-	-	499	(499)			▲0.00%
V0194 Lori Nichols	-	-	-	-	1,898	(1,898)			▲0.00%
V0245 Grant Dixon	-	-	-	-	1,232	(1,232)			▲0.00%
V0201 Herman Steele	361	-	1,378	-	1,372	6			▲0.44%
V0184 Jill Stephens	769	-	1,792	-	1,779	13			▲0.73%
V0211 Homer Glenn	-	-	241	-	231	10			▲4.15%
V0240 Heidi Riley	-	-	802	-	765	37			▲4.71%
V0089 Wayne Palmer	342	-	1,310	-	1,212	98			▲7.48%

People Power: Unlocking Workforce Insights with Solver

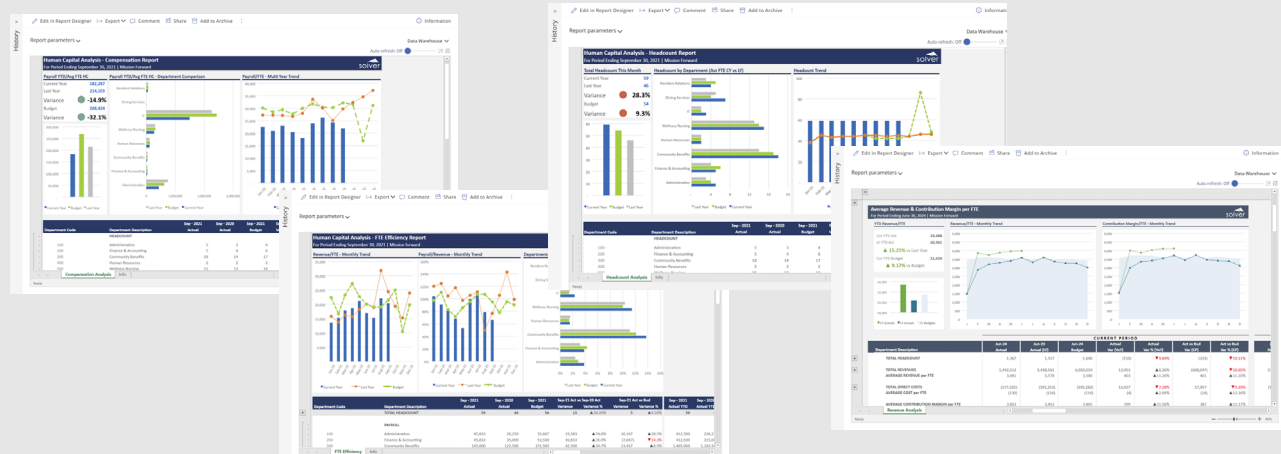
Workforce management in nonprofits is a delicate dance—balancing staff costs, volunteer contributions, and program demands with limited budgets. HR managers and executives often struggle with outdated tools that fail to provide a clear picture of headcount trends, compensation efficiency, or revenue per employee, leaving them guessing about resource allocation. This lack of insight can lead to overstaffing, underfunding critical roles, or missed opportunities to optimize human capital. Solver's xFP&A solution steps in with advanced workforce reporting and analysis, giving leaders the tools to turn labor data into leadership decisions.



Nonprofits must balance staff, volunteers, and budgets. Solver's xFP&A turns workforce data into insights, helping leaders optimize resources and drive mission success.

The nonprofit sector's reliance on both paid and volunteer staff adds layers of complexity. Tracking payroll as a percentage of revenue, analyzing departmental efficiency, or forecasting staffing needs often requires stitching together data from multiple systems—a process prone to errors and delays. Solver eliminates these headaches by integrating workforce metrics into its cloud platform, offering graphical reports that highlight trends and variances at a glance. When combined with Solver's employee budgeting capabilities (explored in the next chapter), this unified approach empowers nonprofits to align their workforce strategy with financial and mission goals.

Solver's workforce reporting templates transform raw data into actionable intelligence. From visualizing revenue per FTE to breaking down compensation by department, these tools help HR and finance leaders optimize their most valuable asset: people. Following this introduction, you will find images of Solver's sample workforce report templates—like the Average Revenue and Contribution Margin per FTE and Human Capital Analysis reports—each with a short paragraph explaining its impact. These examples showcase Solver's versatility and power in driving workforce decisions that support your mission.



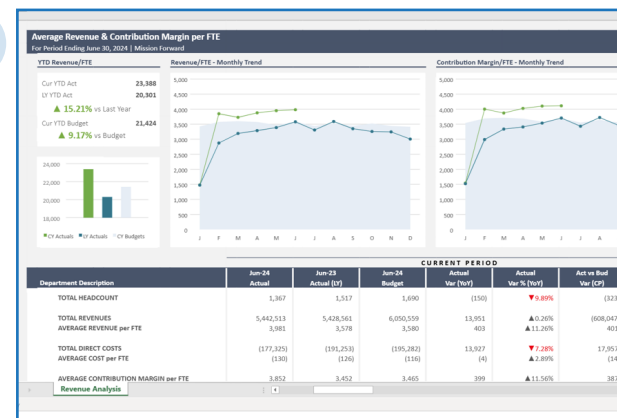
Click here to visit Solver's Showcase for full screen views of these and other templates.



Below, you'll find brief descriptions of several Workforce reports. You can also use Solver for transactional personnel reports, such as actual versus budget payroll reports by department. The templates are customizable using Solver's Report Designer, and you can also create your own tailored designs.

V04_R05_MOD - Average Revenue and Contribution Margin per FTE

Using this visual report, managers can easily analyze variances for year-to-date figures and detect monthly trends for Revenue per FTE and Contribution Margin per FTE. The combo format provides both charts and a table layout.



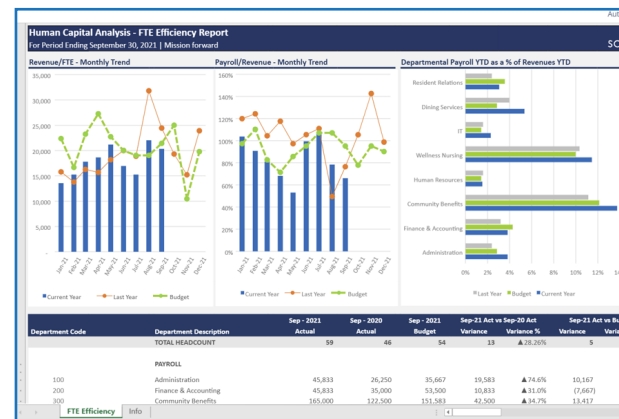
V04_R821 - Human Capital Analysis – Compensation Report

This report features a dashboard at the top and a detailed table below. The dashboard presents the average salary per Full-Time Equivalent (FTE) employee, along with variance data and a monthly trend chart. The table beneath breaks down these figures at the department level.



V04_R822 - Human Capital Analysis – FTE Efficiency Report

This template makes it simple to identify trends and spot actual-to-budget variances for key metrics like Revenue per FTE, Payroll as a percentage of Revenue, and Payroll as a percentage of Revenue by department.



V04_R823 - Human Capital Analysis – Headcount Report

This report is designed to provide managers with a clear overview of headcount trends and variances. The table at the bottom offers detailed figures, including actuals, budget, and percentage variances by department.



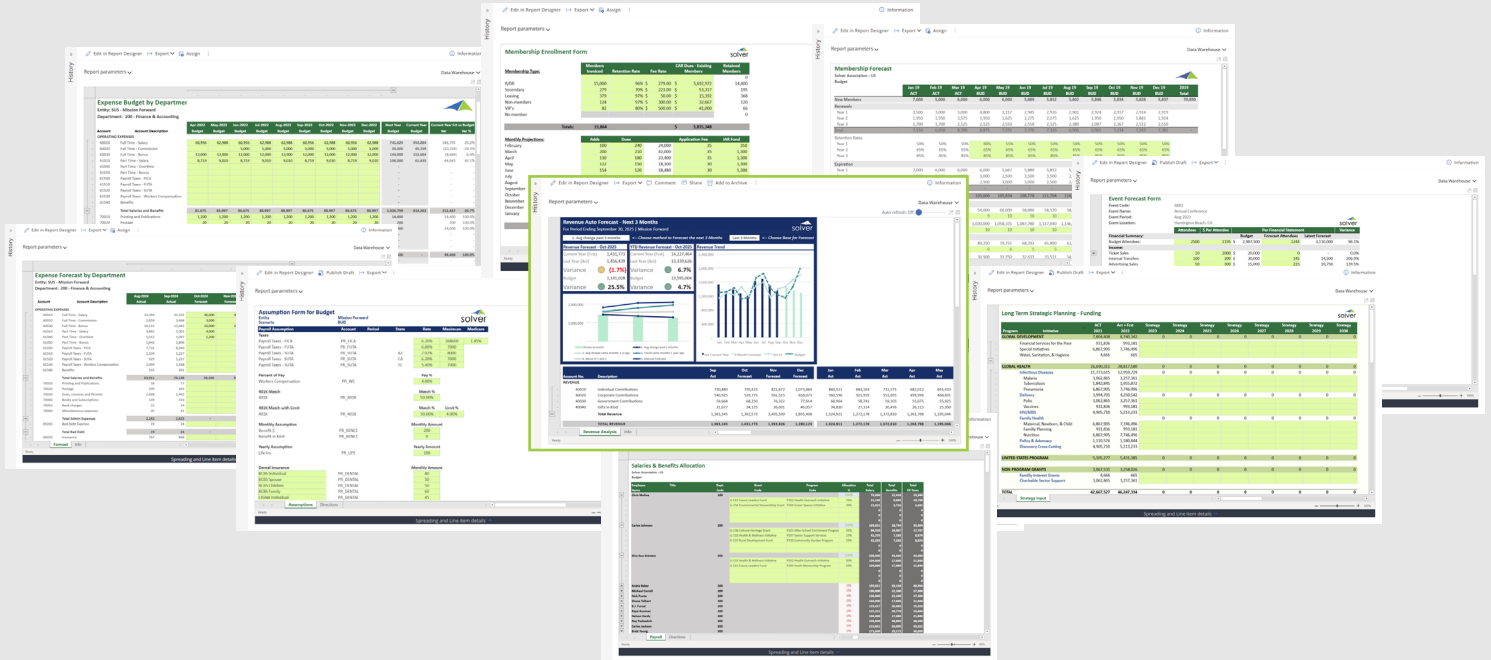
Plan with Purpose: Simplifying Nonprofit Budgeting with Solver

Budgeting and forecasting in nonprofits are high-stakes endeavors, yet they're often bogged down by inefficiency. Budget managers in the Office of Finance wrestle with manual data entry, version control issues, and rigid tools that can't adapt to shifting priorities like grant cycles or fundraising campaigns. These challenges lead to inaccurate forecasts, missed deadlines, and frustration across departments. Solver's modern FP&A solution revolutionizes this process, offering automated workflows, flexible input templates, and real-time collaboration to streamline planning and keep your nonprofit future-ready.



The complexity of nonprofit budgeting stems from its multifaceted nature—balancing restricted funds, operational expenses, and long-term goals while satisfying diverse stakeholders. Traditional spreadsheets and legacy systems struggle to handle this, often leaving finance teams buried in revisions instead of focusing on strategy. Solver's cloud-based platform flips the script with intuitive templates that pull in actuals, calculate variances, and support driver-based forecasting. Paired with workflow features for submissions and approvals, Solver ensures accuracy and accountability, freeing budget managers to plan with confidence.

Solver's budgeting and forecasting templates are designed to meet nonprofits where they are, from short-term revenue projections to multi-year strategic plans. These tools simplify the complex, making planning a proactive strength rather than a reactive burden. After this introduction, we will present images of Solver's sample budget and forecast input templates — like the Revenue Auto Forecast and Employee Payroll Budget with Assumptions templates — each with a brief description of its value. These examples highlight how Solver's flexibility and power pave the way for a stronger financial future.



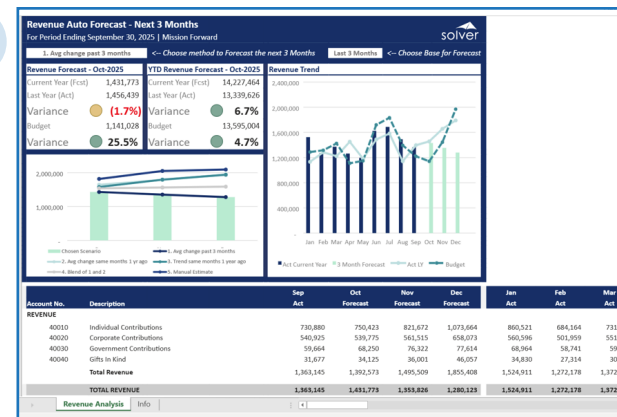
Click here to visit Solver's Showcase for full screen views of these and other templates.



Below, you'll find brief descriptions of various budgeting and forecasting input templates. More are available in Solver's template Marketplace. The templates are customizable using Solver's Report Designer, and you can also create your own tailored designs.

V04_A101F - Revenue Auto Forecast - Next 3 Months

When there's a need to quickly forecast revenues for the upcoming months, this interactive forecast model efficiently pulls actual revenues up to the current month and allows users to automatically generate forecasts for the next three months based on three key drivers.




This input form automatically displays year-to-date actual figures and includes fields for users to enter forecasts for the remainder of the year. It also calculates variances between the forecast and the current year's budget.

Expense Forecast by Department									
Entity: US - Mission Forward									
Department: 200 - Finance & Accounting									
Account	Account Description	Aug-2024 Actual	Sep-2024 Actual	Oct-2024 Forecast	Nov-2024 Forecast	Dec-2024 Forecast	Current Year Forecast	Current Year Forecast	Current Year Forecast
OPERATING EXPENSES									
60010	Full Time - Salary	33,394	43,101	40,000	40,000	40,000		488,665	
60020	Full Time - Commission	2,818	3,468	3,000	3,000	3,000		39,708	
60030	Full Time - Bonus	10,115	11,442	10,000	10,000	10,000		124,238	
60100	Part Time - Salary	3,881	5,001	4,000	4,000	4,000		59,615	
60140	Part Time - Overtime	1,012	1,097	1,200	1,200	1,200		13,933	
61050	Part Time - Bonus	1,642	1,806					13,601	
61000	Payroll Taxes - FICA	7,731	8,340					72,221	
61130	Payroll Taxes - FUTA	1,104	1,227					18,887	
61120	Payroll Taxes - SUTA	929	1,227					10,689	
61350	Payroll Taxes - Workers Compensation	1,094	1,168					10,641	
61340	Benefits	251	261					2,089	
	Total Salaries and Benefits	63,911	76,136	\$8,200	\$8,200	\$8,200		852,099	
70010	Printing and Publications	56	77					611	
70020	Postage	299	345					2,848	
70030	Dues, Licenses and Permits	1,668	1,942					16,646	
70040	Books and Subscriptions	149	193					1,478	
70050	Bank charges	22	24					216	
70060	Miscellaneous expenses	35	41					374	
	Total Admin Expenses	2,232	2,623	-	-	-		22,134	
65010	Bad Debt Expense	19	24					183	
	Total Bad Debt	19	24					183	
66010	Insurance	767	808					7,741	
	Forecast Info								

Spreading and Line item details

These two forms allow budget users to first capture all key drivers for taxes and benefits and then input salaries and other essential employee information by department. Taxes and benefits, as well as the monthly distribution of salaries, are automatically calculated.

Assumption Form for Budget									
Entity	Mission Forward		BUD						
Scenario									
Payroll Assumption	Account	Period	State	Rate	Maximum	Medicare			
Taxes									
Payroll Taxes - FICA	PR_FICA			6.20%	106000	1.45%			
Payroll Taxes - FUTA	PR_FUTA			6.00%	7000				
Payroll Taxes - SUTA	PR_SUTA		AZ	7.02%	8000				
Payroll Taxes - SUTA	PR_SUTA		CA	6.20%	7000				
Payroll Taxes - SUTA	PR_SUTA		FL	5.40%	7000				
Percent of Pay									
Workers Compensation	PR_WC			4.00%					
401K Match									
401K	PR_401K								
401K Match with Limit									
401K	PR_401K								
Monthly Assumption									
Benefits %	PR_BEN1								
Benefits in Kind	PR_BEN1								
Yearly Assumption									
Life Ins	PR_LIFE								
Dental Insurance									
BCBS Individual	PR_DENTAL								
BCBS Spouse	PR_DENTAL								
BCBS Children	PR_DENTAL								
BCBS Family	PR_DENTAL								
CIGNA Individual	PR_DENTAL								
Payroll Budget									
Mission Forward	BUD								
Administration	BUD								
Healthcare	BUD								
Employee									
Employee	Title	Start Month	End Month	Annual Rate	Pay	Annual	Pay	Increase	%
Administration									
Supervisor									
Chris Smith	Supervisor	7/1/2007		2,080.00	55,135	55,135	0%		
Debra Williams	Manager	6/1/2006		2,080.00	55,068	55,068	0%		
Christine Martinez	Executive	6/1/2005		2,080.00	174,720	174,720	0%		
Paula Peterson	Executive		Aug	2,080.00	120,000	120,000	0%		
To Be Hired K1	Accident								
To Be Hired K2	Accident				2,080.00	80,000	0%		
Hourly Employees									
Chris Smith	Executive	4/1/2004		2,080.00	55	55,260	0%		
Paula Peterson	Executive	7/1/2008		1,940.00	17	17,880	0%		
Debra Williams	Executive	12/1/2008		2,080.00	18	21,840	0%		
Orlando Jaramila	As Supervisor	12/1/1997		2,080.00	20	40,000	0%		

Department managers typically use this Operating Expense input form to enter their General Ledger-level budgets. They can either input their budgets manually on a monthly basis or utilize Solver's spreading utility to copy last year's actuals, apply a percentage increase, or perform seasonal allocations.

Expense Budget by Department												
Entity: SUS - Mission Forward												
Department: 200 - Facility & Accounting												
Account	Account Description	Apr-2022 Budget	May-2022 Budget	Jun-2022 Budget	Jul-2022 Budget	Aug-2022 Budget	Sep-2022 Budget	Oct-2022 Budget	Nov-2022 Budget	Dec-2022 Budget	Next Yr Budget	
OPERATING EXPENSES												
60010	Full Time - Salary	60,956	62,988	60,956	62,988	60,956	62,988	60,956	62,988	60,956	741,000	
60020	Full Time - Commission			5,000	5,000	5,000	5,000	5,000	5,000	5,000	60,000	
60030	Full Time - Bonus	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	144,000	
61010	Part Time - Salary	8,719	9,010	8,719	9,010	8,719	9,010	8,719	9,010	8,719	105,000	
61046	Part Time - Commission											
61500	Part Time - Bonus											
61500	Payroll Taxes - FICA											
61510	Payroll Taxes - FUTA											
61520	Payroll Taxes - SUTA											
61530	Payroll Taxes - Workers Compensation											
61540	Benefits											
Total Salaries and Benefits		81,675	83,997	86,675	88,997	88,997	86,675	88,997	86,675	88,997	1,026,000	
70010	Printing and Publications	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	14,400	
70020	Postage	20	20	20	20	20	20	20	20	20	240	
70030	Dues and Licenses and Permits	2,400	2,400	2,400	2,400	2,400	2,400	2,400	2,400	2,400	24,000	
70040	Books and Subscriptions											
70050	Bank Charges											
70060	Miscellaneous expenses											
Total Admin Expenses		3,620	3,620	3,620	3,620	3,620	3,620	3,620	3,620	3,620	36,240	
65010	Bad Debt Expense											
Total Bad Debt		-	-	-	-	-	-	-	-	-	-	
66010	Insurance											
Total Insurance												
Budget												

This input form example shows how salaries and benefits can be allocated to, for example Programs and Grants to get a better picture of where time and therefore employee costs are distributed.

Salaries & Benefits Allocation									
Salver Association - US									
Budget									
Employee Name	Title	Dept.	Code	Grant Code	Program	Allocation	Total Salary	Total Benefits	Total 13 Weeks
Chris Mullis						100%	71,000	12,418	15,940
				G 133 Health Leaders Fund	P202 Health Outreach Initiative	20%	14,200	2,483	3,105
				G 134 Environmental Stewardship Grant	P208 Green Spaces Initiative	30%	21,300	3,726	4,640
						50%	0	0	0
Carlos Johnson		200				100%	189,023	28,794	35,498
				G 136 Cultural Heritage Grant	P201 After-School Enrichment Program	10%	18,902	3,467	4,414
				G 133 Health & Wellness Initiative	P207 Senior Support Services	25%	47,256	7,188	8,674
				G 137 Rural Development Initiative	P220 Community Grant Program	25%	47,256	7,188	8,674
Shin-Don Eskin		200				100%	206,000	31,360	40,000
				G 133 Health & Wellness Initiative	P202 Health Outreach Initiative	50%	103,000	17,680	22,840
				G 131 Health Leaders Fund	P205 Youth Mentorship Program	50%	103,000	17,680	22,840
							0	0	0
Andre Baker		200				0%	0	0	0
						0%	88,334	0	0
						0%	189,023	28,794	35,498
						0%	0	0	0
Michael Carroll		200				0%	189,023	22,100	27,900
						0%	0	0	0
Nick Potts		200				0%	189,023	22,100	27,900
						0%	0	0	0
Shawn Robert		200				0%	129,000	17,680	22,840
						0%	0	0	0
B. J. Fernald		200				0%	124,427	20,963	25,920
						0%	0	0	0
April Gorman		200				0%	122,223	20,774	25,666
						0%	0	0	0
Nathan Hardy		200				0%	106,000	17,680	22,840
						0%	0	0	0
Ray Penabazko		200				0%	228,000	38,896	49,680
						0%	0	0	0
Carlos Johnson		300				0%	111,893	18,400	23,552
						0%	0	0	0
Brett Young		300				0%	111,400	20,173	26,024
						0%	0	0	0
<div> <div>Payroll</div> <div>Directions</div> </div>							<div> <div></div> <div></div> </div>		

Spreading and Line item details >

V04_F999_DEMO - Membership Forecast

This driver-based forecast form enables detailed member-related revenue and expense planning based on member count, renewals, retention and expiration metrics.

Membership Forecast										
Solver Association - US										
Budget										
	Jan 19	Feb 19	Mar 19	Apr 19	May 19	Jun 19	Jul 19	Aug 19	Sep 19	
	ACT	ACT	ACT	ACT	BUD	BUD	BUD	BUD	BUD	
New Members	7,000	5,000	6,000	8,000	8,000	5,889	5,852	5,802	5,8	
Renewals										
Year 1	3,500	3,000	3,000	4,800	3,117	2,945	2,926	2,901	2,9	
Year 2	1,950	1,950	3,575	1,950	1,625	2,275	2,275	1,625	1,9	
Year 3	1,700	1,700	2,125	2,125	2,550	2,550	2,125	2,380	2,0	
Total	7,150	6,650	8,700	8,875	7,292	7,770	7,326	6,906	6,9	
Retention Rates										
Year 1	50%	50%	50%	50%	50%	50%	50%	50%	50%	
Year 2	65%	65%	65%	65%	65%	65%	65%	65%	65%	
Year 3	85%	85%	85%	85%	85%	85%	85%	85%	85%	
Expiration										
Year 1	7,000	6,000	6,000	6,000	5,667	5,889	5,852	5,802	5,8	
Year 2	3,000	3,000	5,500	3,000	2,500	3,500	3,500	2,500	3,0	
Year 3	2,000	2,000	2,500	2,500	3,000	3,000	2,500	2,800	2,4	
Total	-	-	-	-	-	-	-	-	-	
Total Members	100,000	105,000	110,000	103,000	105,834	108,778	111,704	114,605	117,5	
Revenue										
42000 Application Revenue	70,000	50,000	60,000	54,000	60,000	58,890	58,520	58,020	58,4	
Application Revenue Price	10	10	10	9	10	10	10	10	10	
42010 Membership Revenue	1,000,000	1,050,000	1,100,000	1,030,000	1,058,335	1,087,780	1,117,040	1,146,050	1,175,2	
Membership Revenue Price	10	10	10	10	10	10	10	10	10	
Expenses										

V04_F999_DEMO - Membership Enrollment

This example shows how users can enter key membership enrollment statistics such as members invoiced, retention, fees, adds and dues.

Membership Enrollment Form					
solver					
Membership Type:	Members Invoiced	Retention Rate	Fee Rate	CAR Dues - Existing Members	Retained Members
R/DR	15,000	96%	\$ 279.00	\$ 3,692,972	14,400
Secondary	279	70%	\$ 223.00	\$ 53,317	195
Leasing	379	97%	\$ 50.00	\$ 15,392	368
Non-members	124	97%	\$ 300.00	\$ 32,667	120
VP's	82	80%	\$ 500.00	\$ 41,000	66
No member					0
Totals:	15,864		\$ 3,835,348		
Monthly Projections:	Adds	Dues	Application Fee	IAR Fund	
February	100	240	24,000	35	350
March	200	210	42,000	35	1,300
April	130	180	23,400	35	1,300
May	122	150	18,300	30	1,300
June	154	120	18,480	30	1,300
July	165	90	14,850	30	1,300
August	164	75	12,300	30	1,300
September	132	60	7,920	25	1,300
October	144	45	6,480	25	1,300
November	143	30	4,230	25	1,300
December	200	15	3,000	25	1,300
January	100	10	1,000	25	1,300
Totals:	1,754	\$ 1,225.00	\$ 176,020	\$ 350	\$ 14,650.00

V04_F999_DEMO - Event Forecast

Using Event forecast forms like this example enables managers to enter detailed statistical and financial figures by event. The revenue and expense totals can automatically be transferred to the related General Ledger accounts.

Event Forecast Form					
Event Code:	A001				
Event Name:	Annual Conference				
Event Period:	Aug 2021				
Event Location:	Huntington Beach, CA				
	Attendees	Per Attendee	Budget	Forecast Attendees	Variance
Financial Summary:	2500	1195	\$ 2,987,500	1244	3,110,000 96.1%
Income:					
Ticket Sales	10	2000	\$ 20,000	0	0.0%
Internal Transfers	100	300	\$ 30,000	145	14,500 206.9%
Advertising Sales	50	300	\$ 15,000	215	10,750 139.5%
Sponsorships	10	5000	\$ 50,000	80	800 6250.0%
Total Income:			\$ 3,122,500	\$ 1,684	\$ 3,136,050 99.6%
Expenses:					
Space	1	40000	\$ 40,000	1	40,000 100.0%
Food/Beverage	2500	210	\$ 525,000	1600	336,000 156.3%
Decorations	100	10	\$ 1,000	187	1,870 53.5%
AV	40	16	\$ 640	14	224 285.7%
Printing	2500	20	\$ 50,000	122	2,440 2049.2%
Photo	2500	30	\$ 75,000	307	9,210 814.3%
Entertainment	1	10000	\$ 10,000	1	10,000 100.0%
Security	100	300	\$ 30,000	100	30,000 100.0%
Sponsor	1	17	\$ 17	1	17 100.0%
Awards	32	55	\$ 1,760	22	1,210 145.5%
Transport	30	100	\$ 3,000	23	2,300 130.4%
Committee	254	25	\$ 6,350	122	3,050 208.2%
Housing	2500	500	\$ 1,250,000	2500	1,250,000 100.0%
Shipping	163	15	\$ 2,445	100	1,500 163.0%
Other	1	12000	\$ 12,000	1	12,000 100.0%
Total Expenses:			\$ 2,007,212	5101	\$ 6,699,821 118.1%

V04_F999_DEMO - Long Term Strategic Planning

Nonprofit executives sometimes need to develop strategies for multiple years into the future, and this example shows a multi-year planning form to capture funding figures by program and initiative.

Long Term Strategic Planning - Funding										
Program	Initiative	ACT 2021	Act + Fut 2022	Strategy 2023	Strategy 2024	Strategy 2025	Strategy 2026	Strategy 2027	Strategy 2028	
GLOBAL DEVELOPMENT		7,804,408	8,740,342	0	0	0	0	0	0	
	Financial Services for the Poor	931,836	993,181							
	Special Initiatives	6,867,905	7,746,496							
	Water, Sanitation, & Hygiene	4,666	665							
GLOBAL HEALTH		26,690,311	28,817,580	0	0	0	0	0	0	
	Infectious Diseases	11,773,615	12,959,729	0	0	0	0	0	0	
	Malaria	3,062,865	3,257,361							
	Tuberculosis	1,840,845	1,955,872							
	Pneumonia	6,867,905	7,746,496							
	Delivery	3,994,701	4,250,542	0	0	0	0	0	0	
	Polio	3,062,865	3,257,361							
	Vaccines	931,836	993,181							
	HIV/AIDS	4,905,710	5,213,233							
	Family Health									
	Maternal, Neonatal, & Child	6,867,905	7,746,496							
	Family Planning	931,836	993,181							
	Nutrition	6,867,905	7,746,496							
	Policy & Advocacy	1,110,576	1,180,844							
	Discovery Cross-Cutting	4,905,710	5,213,233							
UNITED STATES PROGRAM		5,105,277	5,431,385	0	0	0	0	0	0	
	Family Interest Grants	3,062,531	3,258,026	0	0	0	0	0	0	
	Charitable Sector Support	2,042,746	2,173,359							
TOTAL		42,647,527	46,247,334	0	0	0	0	0	0	
Strategy Input										

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