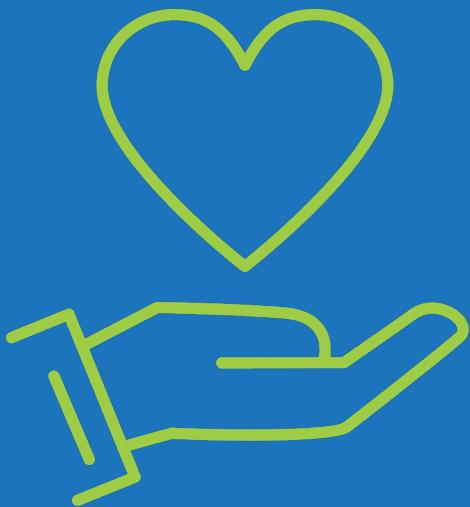


# Mission Amplified: Unlocking Nonprofit Potential with Solver

The xFP&A Solution for Nonprofit Organizations



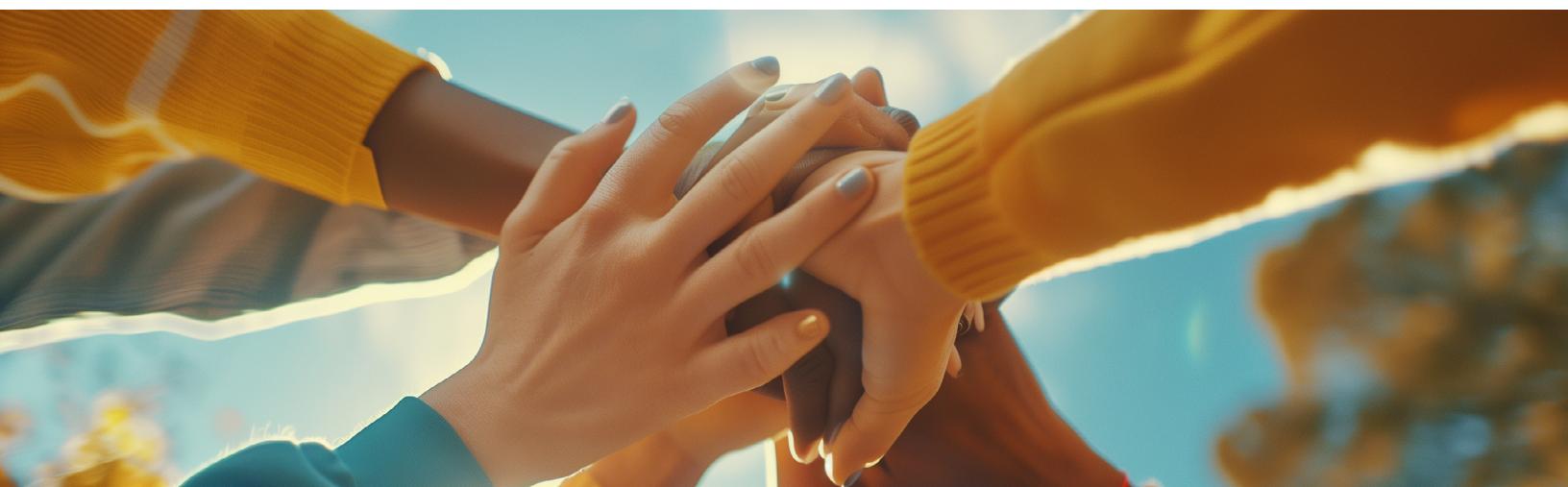
# Table of Contents

Empowering Your Mission: How xFP&A Redefines Nonprofit Strategy.....	3
Clarity at a Glance: KPIs That Power Nonprofit Leadership.....	4
Precision Unleashed: Revolutionizing Nonprofit Financial Reporting.....	7
Insight in Action: Boosting Nonprofit Operations with Solver.....	10
People Power: Unlocking Workforce Insights with Solver.....	18
Plan with Purpose: Simplifying Nonprofit Budgeting with Solver.....	21



# 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 Manual reporting processes, siloed data systems, and outdated tools often hinder timely decision-making, leaving leaders reactive rather than proactive.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.



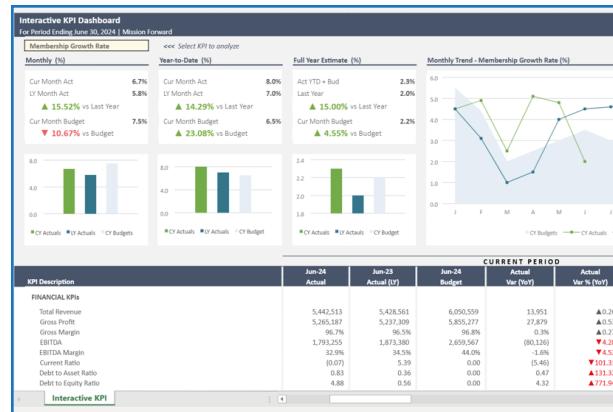
Click here to visit Solver's Showcase for full screen views of these and other templates.



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.



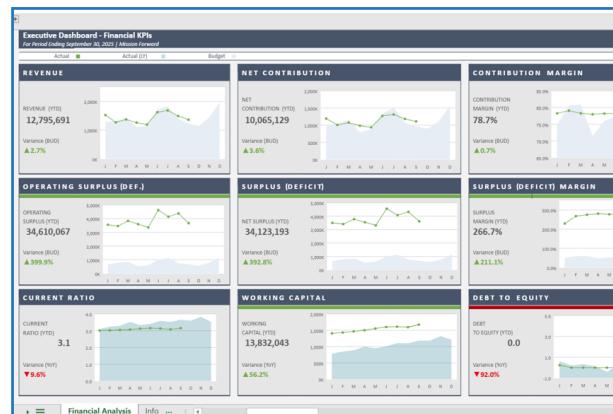
## V04\_K02 - KPI – Scorecard

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

KPI Description	CURRENT PERIOD					
	Jun - 2021 Actual	Jun - 2021 Actual (Y)	Jun - 2021 Budget	Actual Var (YoY)	Actual Var % (YoY)	Act vs Bud Var (CP)
<b>FINANCIAL KPIs</b>						
Total Revenue	5,442,513	5,428,561	6,050,559	13,951	0.26%	(608,043)
Gross Profit	5,265,187	5,237,309	5,855,277	27,879	0.53%	(590,096)
Gross Margin	96.7%	96.5%	98.8%	0.3%	0.27%	0.0%
EBITDA	1,793,255	1,873,380	2,059,527	(80,126)	-4.28%	(866,312)
EBITDA Margin	32.9%	34.5%	44.0%	-1.3%	-3.2%	-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
<b>GRANT KPIs</b>						
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%	1.4%	40.96%	1.4%
Average Grant Size	55,000	49,000	58,000	6,000	12.24%	3,000
<b>MEMBER KPIs</b>						
Total Membership Count	32,300	29,000	31,000	3,300	11.38%	1,300
Membership Revenue	4,360,500	3,915,000	4,185,000	445,500	11.38%	175,500
New Memberships	1,000	755	900	25	293.30%	81
Average Revenue per Member	66.2%	67.1%	90.9%	-1.0%	-14.2%	-24.1
<b>DONOR KPIs</b>						
Donor Retention Rate	72.9%	64.4%	103.4%	8.5%	13.16%	0.0
Average Gift Size	2,000	2,200	1,900	(100)	-9.09%	100
Eventualistic Revenue Growth	50.7%	65.1%	87.9%	-4.4%	-8.33%	-71.1%
<b>KPI Summary</b>						

## 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.



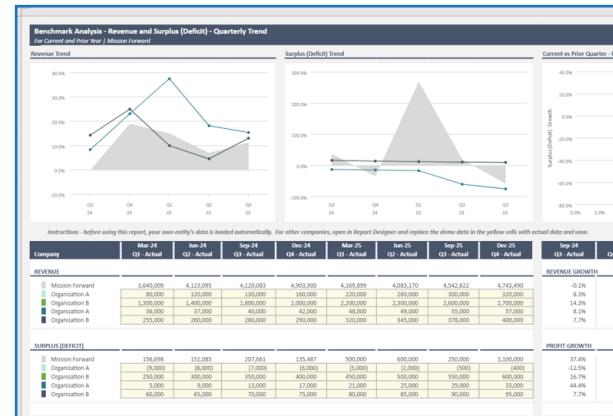
## V04\_K06 - Executive Dashboard - Operational KPIs

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.

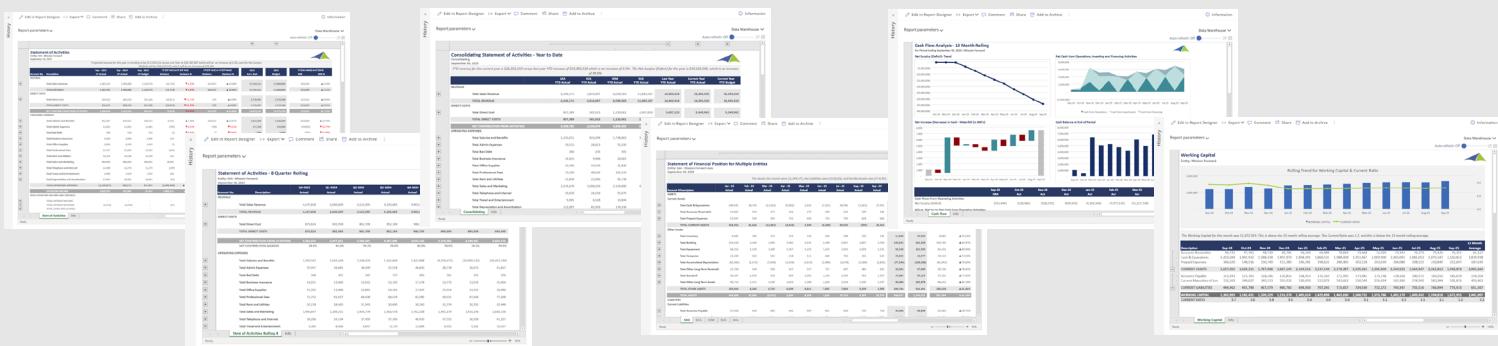


# Precision Unleashed: Revolutionizing Nonprofit Financial Reporting

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 SUS - Mission Forward								
September 30, 2025								
Projected revenue for this year is trending to be \$17,730,527 versus Last Year of \$16,787,087 which will be an increase of 3.2%, and the Net Surplus (Deficit) will be \$1,922,233, which will be an increase of 101.6%.								
Account No.	Description	Sep - 2025 CY (P-Amt)	Sep - 2024 CY (P-Amt)	Sep - 2025 CY (P-Amt)	CY (P-Amt) on YTD (P-Amt)	CY (P-Amt) on CY (P-Bal)	YTD Actual	YTD Budget
<b>REVENUE</b>								
Total Sales Revenue	1,363,145	1,294,880	1,220,578	(31,734)	142,567	▲ 10.4%	17,593,521	17,098,806
<b>TOTAL REVENUE</b>	<b>1,363,145</b>	<b>1,294,880</b>	<b>1,220,578</b>	<b>(31,734)</b>	<b>142,567</b>	<b>▲ 10.4%</b>	<b>17,593,521</b>	<b>17,098,806</b>
<b>DIRECT COSTS</b>								
Total Direct Cost	274,515	254,120	254,286	(29,811)	229	▲ 1.0%	3,710,907	3,713,580
<b>TOTAL DIRECT COSTS</b>	<b>274,515</b>	<b>254,120</b>	<b>254,286</b>	<b>(29,811)</b>	<b>229</b>	<b>▲ 1.0%</b>	<b>3,710,907</b>	<b>3,713,580</b>
<b>NET CONTRIBUTION FROM ACTIVITIES</b>	<b>1,088,630</b>	<b>1,040,754</b>	<b>966,291</b>	<b>(32,445)</b>	<b>93,036</b>	<b>▲ 13.4%</b>	<b>14,892,510</b>	<b>14,294,926</b>
<b>OPERATING EXPENSES</b>								
Total Salaries and Benefits	401,387	395,051	298,335	6,338	▲ 1.5%	101,052	▲ 25.4%	5,625,000
Total Admin Expenses	12,042	12,820	12,802	(78)	▲ 6.1%	(760)	▲ 7.2%	117,268
Total Bad Debt	109	110	110	(1)	▲ 0.9%	(1)	▲ 0.9%	1,600
Total Business Insurance	4,560	4,400	4,406	154	▲ 3.8%	154	▲ 2.1%	42,781
Total Office Supplies	4,838	4,839	4,839	(1)	▲ 0.0%	(1)	▲ 0.0%	48,819
Total Professional Fees	21,437	22,365	22,365	(928)	▲ 4.3%	(928)	▲ 4.3%	214,422
Total Rent and Utilities	10,254	10,108	10,108	144	▲ 1.4%	144	▲ 1.4%	97,014
Total Sales and Marketing	484,669	486,854	496,804	10,095	▲ 3.7%	10,095	▲ 3.7%	4,532,883
Total Telephone and Internet	12,088	12,276	12,276	(189)	▲ 1.5%	(189)	▲ 1.5%	155,288
Total Travel and Entertainment	3,090	2,959	2,959	160	▲ 5.3%	160	▲ 5.3%	28,514
Total Depreciation and Amortization	37,987	38,081	38,081	(94)	▲ 0.2%	(94)	▲ 0.2%	568,445
<b>TOTAL OPERATING EXPENSES</b>	<b>(250,807)</b>	<b>160,379</b>	<b>87,855</b>	<b>(1,490,448)</b>	<b>▲ 138,406</b>	<b>(3,991,732)</b>	<b>▲ 184,886</b>	<b>5,269,687</b>
<b>NON-OPERATING INCOME AND EXPENSES</b>								
TOTAL INTEREST INCOME	-	-	-	-	-	-	-	-
TOTAL INTEREST EXPENSES	(4,176)	-	-	(87)	▲ 1.6%	(87)	▲ 1.6%	(38,543)
<b>TOTAL GAIN (LOSS)</b>	<b>(4,176)</b>	<b>-</b>	<b>-</b>	<b>(87)</b>	<b>-</b>	<b>(87)</b>	<b>-</b>	<b>(38,543)</b>
<b>Statement of Activities</b>	<b>Info</b>	<b>...</b>						

## 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 SUS - Mission Forward								
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
<b>REVENUE</b>								
Total Sales Revenue	4,137,038	3,640,009	4,123,095	4,120,083	4,903,900	4,169,899	4,083,173	
<b>TOTAL REVENUE</b>	<b>4,137,038</b>	<b>3,640,009</b>	<b>4,123,095</b>	<b>4,120,083</b>	<b>4,903,900</b>	<b>4,169,899</b>	<b>4,083,173</b>	
<b>DIRECT COSTS</b>								
Total Direct Cost	873,824	692,958	862,708	852,184	980,734	896,804	893,30	
<b>TOTAL DIRECT COSTS</b>	<b>873,824</b>	<b>692,958</b>	<b>862,708</b>	<b>852,184</b>	<b>980,734</b>	<b>896,804</b>	<b>893,30</b>	
<b>NET CONTRIBUTION FROM ACTIVITIES</b>	<b>3,264,014</b>	<b>2,947,051</b>	<b>3,260,387</b>	<b>3,267,899</b>	<b>3,923,166</b>	<b>3,273,095</b>	<b>3,189,860</b>	
<b>NET CONTRIBUTION MARGIN</b>	<b>78.9%</b>	<b>81.0%</b>	<b>79.1%</b>	<b>79.3%</b>	<b>80.0%</b>	<b>78.5%</b>	<b>78.1%</b>	
<b>OPERATING EXPENSES</b>								
Total Salaries and Benefits	1,202,562	1,042,438	1,169,474	1,162,604	1,423,888	(9,276,672)	(10,009,113)	
Total Admin Expenses	37,947	34,081	38,449	37,518	46,202	38,778	36,67	
Total Bad Debt	348	301	342	337	403	341	33	
Total Business Insurance	14,011	12,060	13,612	13,192	17,178	13,772	13,55	
Total Office Supplies	15,202	13,066	14,802	14,341	17,425	15,014	14,31	
Total Professional Fees	71,752	61,657	68,438	68,424	83,385	69,421	67,56	
Total Rent and Utilities	32,218	28,465	31,043	30,600	38,260	31,274	30,35	
Total Sales and Marketing	1,495,647	1,309,251	1,454,779	1,416,779	1,762,208	1,491,179	1,410,119	
Total Telephone and Internet	38,266	33,104	37,459	37,369	46,933	37,552	36,50	
Total Travel and Entertainment	9,385	8,466	9,647	9,170	11,684	9,455	9,16	
<b>Stmt of Activities Rolling 8</b>	<b>Info</b>	<b>...</b>						

## 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								
Account No.	Description	SAS YTD Actual	SCA YTD Actual	SEM YTD Actual	SUS YTD Actual	Last Year YTD Actual	Current Year YTD Actual	
<b>REVENUE</b>								
Total Sales Revenue	4,246,171	2,814,997	6,039,563	11,883,187	24,983,918	26,393,550		
<b>TOTAL REVENUE</b>	<b>4,246,171</b>	<b>2,814,997</b>	<b>6,039,563</b>	<b>11,883,187</b>	<b>24,983,918</b>	<b>26,393,550</b>		
<b>DIRECT COSTS</b>								
Total Direct Cost	897,389	581,923	1,210,061	2,407,850	5,097,223	5,549,942		
<b>TOTAL DIRECT COSTS</b>	<b>897,389</b>	<b>581,923</b>	<b>1,210,061</b>	<b>2,407,850</b>	<b>5,097,223</b>	<b>5,549,942</b>		
<b>NET CONTRIBUTION FROM ACTIVITIES</b>	<b>3,348,782</b>	<b>2,233,074</b>	<b>4,829,569</b>	<b>9,475,337</b>	<b>19,886,696</b>	<b>20,843,608</b>		
<b>OPERATING EXPENSES</b>								
Total Salaries and Benefits	1,239,031	832,294	1,378,863	3,374,506	7,165,695	(25,835,238)		
Total Admin Expenses	39,521	26,613	55,310	110,049	231,492	241,839		
Total Bad Debt	366	235	505	980	2,079	2,165		
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	89,681	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	180,600	201,148		
Total Sales and Marketing	1,534,679	1,046,593	2,124,890	4,180,508	8,886,669	9,386,800		
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	719,579	757,248		
<b>Consolidating</b>	<b>Info</b>	<b>...</b>						

## 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.

Statement of Financial Position for Multiple Entities											
Entity: SAS - Mission Forward Asia September 30, 2025											
The Assets this month were \$1,244,471, the Liabilities were \$530,016, and the Net Assets was \$714,455.											
Account / Description	Jan - 24 Actual	Feb - 24 Actual	Mar - 24 Actual	Apr - 24 Actual	May - 24 Actual	Jun - 24 Actual	Jul - 24 Actual	Aug - 24 Actual	Sep - 24 Actual	Total YTD Actual	Total YTD Budget
<b>ASSETS</b>											
<b>Current Assets</b>											
<b>Total Cash &amp; Equivalents</b>	249,541	30,743	(13,461)	(5,902)	1,631	(7,331)	38,785	(1,432)	27,411	320,184	
<b>Total Accounts Receivable</b>	15,065	29	275	326	273	369	332	299	341	17,573	
<b>Total Prepaid Expenses</b>	53,947	590	595	752	635	753	793	628	663	59,356	
<b>TOTAL CURRENT ASSETS</b>	<b>318,592</b>	<b>31,426</b>	<b>(12,491)</b>	<b>(4,624)</b>	<b>2,359</b>	<b>(6,209)</b>	<b>39,910</b>	<b>(565)</b>	<b>28,415</b>	<b>397,113</b>	
<b>Other Assets</b>											
<b>Total Inventory</b>	9,684	260	244	244	226	268	298	220	236	13,680	
<b>Total Building</b>	114,420	3,106	3,445	3,382	3,531	4,150	5,967	2,807	3,766	142,613	
<b>Total Equipment</b>	46,252	1,159	1,208	1,267	1,225	1,323	1,503	1,029	1,215	56,138	
<b>Total Computer</b>	21,200	563	555	618	511	669	703	491	513	23,843	
<b>Total Accumulated Depreciation</b>	(63,381)	(15,733)	(14,548)	(16,056)	(14,613)	(20,084)	(27,078)	(15,589)	(18,812)	(77,244)	
<b>Total Other Long-Term Receivable</b>	21,750	549	558	557	527	717	607	482	655	26,363	
<b>Total Goodwill</b>	39,397	1,049	918	994	1,055	1,138	1,294	933	1,107	47,884	
<b>Total Other Long-Term Assets</b>	45,711	1,171	1,230	1,453	1,349	1,616	1,514	1,105	1,137	56,466	
<b>TOTAL OTHER ASSETS</b>	<b>235,094</b>	<b>6,264</b>	<b>6,720</b>	<b>6,839</b>	<b>6,811</b>	<b>7,833</b>	<b>7,804</b>	<b>5,428</b>	<b>6,938</b>	<b>289,764</b>	
<b>TOTAL ASSETS</b>	<b>553,686</b>	<b>37,680</b>	<b>(5,491)</b>	<b>2,055</b>	<b>9,352</b>	<b>1,826</b>	<b>47,714</b>	<b>4,778</b>	<b>35,617</b>	<b>610,777</b>	
<b>LIABILITIES</b>											
<b>Current Liabilities</b>											
<b>Total Accounts Payable</b>	37,566	646	684	681	687	831	850	705	718	43,368	

## 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.

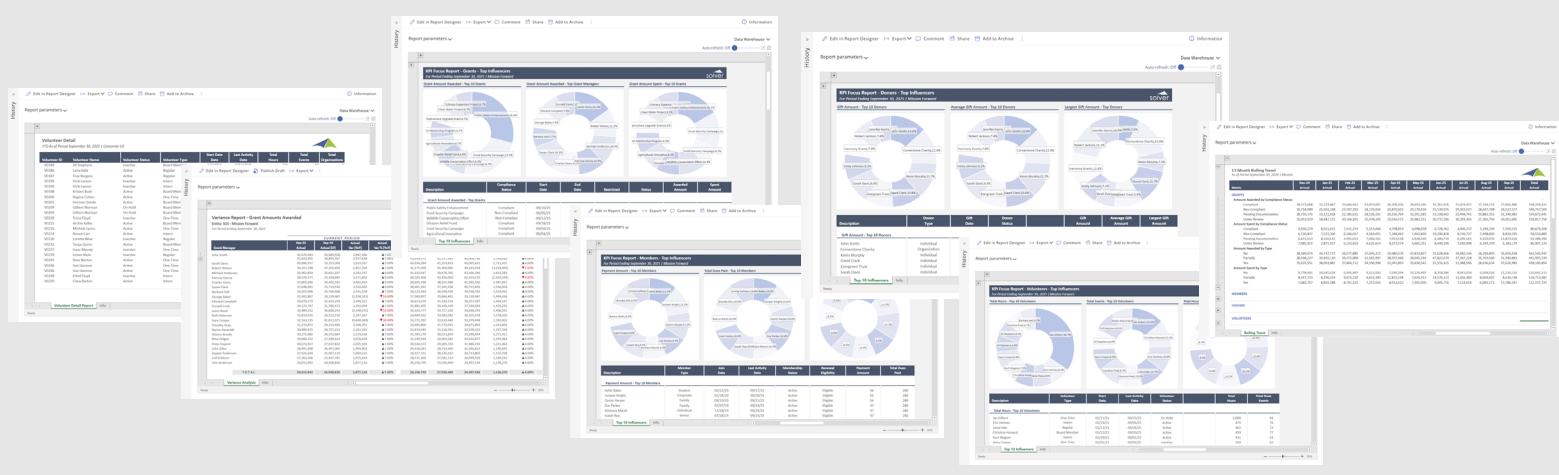


# Insight in Action: Boosting Nonprofit Operations with Solver

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	Awarded	Amount	As
G017	Workforce Training Program	Kelly Adams	7/31/2025	No	Pending Documentation	9/9/2025	9/9/2028	Completed	225,809		
G018	Cultural Heritage Preservation	Laura Martin	7/4/2025	Partially	Compliant	9/20/2025	9/20/2028	Expired	652,882		
G019	Food Security Campaign	James Parker	7/1/2025	No	Under Review	9/9/2025	9/9/2028	Completed	1,030,174		
G020	Infrastructure Upgrade Grant	Andrew Phillips	7/8/2025	Yes	Non-Compliant	9/3/2025	9/22/2028	Pending	117,935		
G001	STEM Education Initiative	Michael Lee	7/10/2025	Yes	Non-Compliant	9/1/2025	9/1/2028	Completed	1,538,323		
G002	Community Health Outreach	Daniel Evans	7/10/2025	Partially	Under Review	9/2/2025	9/22/2027	Pending	587,077		
G003	Urban Renewal Project	Steven Moore	7/14/2025	Yes	Compliant	9/2/2025	9/2/2028	Completed	1,060,084		
G005	Arts in Schools Program	David Wilson	7/15/2025	No	Non-Compliant	9/3/2025	9/28/2027	Active	330,771		
G006	Rural Broadband Expansion	Michelle Garcia	7/16/2025	No	Pending Documentation	9/15/2025	9/15/2027	Pending	1,676,320		
G007	Youth Mentorship Program	Jessica Young	7/21/2025	Partially	Compliant	9/20/2025	9/20/2027	Pending	1,514,298		
G008	Clean Energy Research	Brian Patel	7/22/2025	Partially	Non-Compliant	9/13/2025	9/13/2028	Completed	1,599,863		
G009	Literacy Program Expansion	Ulysses Green	7/23/2025	No	Pending Documentation	9/2/2025	9/2/2027	Pending	1,451,841		
G010	Homeless Shelter Support	Amanda Clark	7/26/2025	No	Compliant	9/23/2025	9/23/2028	Active	1,661,205		
G011	Minority Business Grants	Jessica Young	7/26/2025	Yes	Compliant	9/22/2025	9/22/2027	Completed	921,103		
G012	Wildlife Conservation Fund	Andrew Phillips	7/26/2025	No	Non-Compliant	9/15/2025	9/15/2027	Active	1,281,562		
G013	Medical Health Awareness	Amanda Clark	7/27/2025	No	Pending Documentation	9/12/2025	9/12/2027	Active	1,250,053		
G014	Tech Innovation Challenge	Charles Davis	7/28/2025	Partially	Pending Documentation	9/17/2025	9/17/2027	Pending	1,591,995		
G015	Senior Care Assistance	Jessica Young	8/1/2025	Partially	Pending Documentation	9/21/2025	9/21/2027	Pending	571,392		
G016	Water Quality Improvement	James Carter	8/1/2025	Yes	Under Review	9/12/2025	9/12/2028	Expired	1,429,616		
G017	Disaster Relief Fund	James Carter	8/2/2025	No	Under Review	9/12/2025	9/12/2026	Active	706,304		
G018	Indigenous Culture Program	Emily Davis	8/3/2025	Yes	Under Review	9/12/2025	9/12/2026	Expired	763,421		
G019	Green Building Initiative	David Wilson	8/6/2025	Yes	Non-Compliant	9/28/2025	9/28/2027	Expired	301,171		

Grand Total **106,494,800** 35,6

Grant Detail Report | Info |

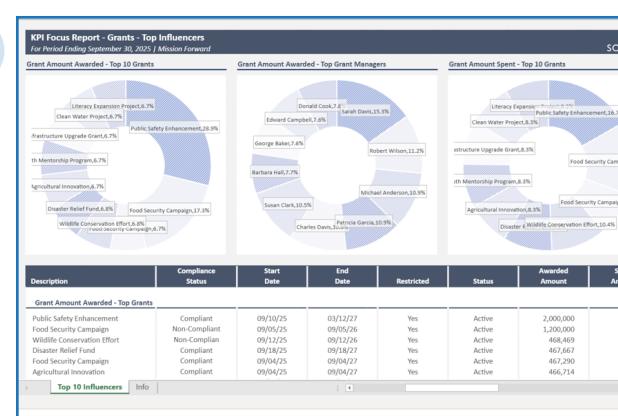
### V04\_R02 - Variance Report - Grant Managers

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											
Entry: S05 - Mission Forward											
For Period Ending September 30, 2025											
Grant Manager	Sep-25 Actual	YTD									
John Smith	42,676,944	39,689,558	2,997,386	▲7,00%	44,811,791	37,435,985	4,366,418	46,944,618			
Sarah Davis	41,823,405	38,895,767	2,927,638	▲7,00%	43,914,575	42,157,992	1,860,415	46,005,746			
Robert Wilson	40,989,000	37,989,200	3,000,800	▲7,00%	40,989,000	37,989,200	0	40,989,000			
Michael Anderson	40,167,198	37,355,884	2,837,794	▲7,00%	42,175,558	45,869,200	4,193,642	44,132,888			
Patricia Garcia	39,361,854	35,821,107	3,542,747	▲5,00%	41,332,047	39,678,765	43,300,240				
Charles Davis	38,576,577	35,104,688	3,477,892	▲5,00%	40,500,560	42,456,000	4,243,425				
Susan Clark	37,048,945	33,714,540	3,314,405	▲5,00%	38,903,392	37,345,336	40,733,819				
Barbara Hall	36,307,966	33,768,408	2,541,558	▲7,00%	38,123,364	36,598,430	39,398,762				
George Baker	35,581,200	30,312,400	3,269,800	▲7,00%	37,369,100	36,386,460	39,159,037				
Donald Cook	34,810,170	31,473,258	2,446,931	▲7,00%	35,163,679	34,586,443	38,173,787				
Jason Reed	34,172,763	31,780,673	2,393,094	▲7,00%	35,881,405	34,446,149	37,590,044				
Elizabeth Brown	33,489,312	30,883,8243	3,648,931	▲7,00%	35,161,377	33,721,226	36,483,243				
Zoeja Tonkinson	32,813,200	29,567,921	1,959,515	▲7,00%	29,317,721	28,145,022	32,173,053				
Leif Erikson	27,363,206	25,447,781	1,915,424	▲7,00%	28,731,166	27,582,112	30,099,526				
Tom Anderson	26,813,942	24,938,820	1,877,116	▲7,00%	28,156,759	27,030,469	29,497,536				
<b>TOTAL</b>											
Variance Analysis											

### 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 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	Sep-25 Actual	Oct-25 Actual	Nov-25 Actual
<b>GRANTS</b>												
Amount Awarded by Compliance Status												
Compliant	38,371,668	32,223,067	23,666,561	22,033,057	26,205,426	29,652,245	25,761,976	21,075,927	17,234,119	2		
Non-Compliant	30,718,089	25,502,248	23,507,293	18,170,656	25,876,653	29,170,434	31,139,976	29,363,037	28,647,298	2		
Pending Documentation	28,703,079	31,121,818	22,385,631	28,526,292	20,556,764	32,291,583	23,138,462	22,498,741	19,883,352	3		
Under Review	25,059,319	18,487,231	30,766,201	25,478,205	33,556,572	29,982,251	30,737,296	30,399,265	27,265,750	2		
Amount Spent by Compliance Status												
Compliant	4,650,279	8,911,631	7,431,233	5,153,668	4,798,819	6,098,658	7,128,362	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	7,698,605	1		
Pending Documentation	6,641,510	8,420,542	4,951,067	7,060,102	7,914,518	5,928,420	6,480,729	6,390,161	4,254,076			
Under Review	7,989,515	2,871,957	6,233,659	6,625,634	8,753,574	5,665,351	8,440,596	7,699,998	6,249,379			
Amount Awarded by Type												
No	38,289,674	36,747,373	26,077,885	37,045,215	33,980,576	47,814,827	31,028,606	38,745,245	28,290,845	3		
Partially	28,938,227	34,942,110	36,473,000	22,565,997	38,972,946	28,645,144	47,802,679	37,287,228	36,703,540	3		
Yes	35,675,551	38,093,881	37,864,712	34,596,998	32,941,893	36,536,542	31,516,425	31,988,595	28,036,634	3		
Amount Spent by Type												
No	9,778,061	10,545,624	6,995,487	9,513,502	7,249,594	10,136,407	8,358,586	8,041,034	6,504,526	1		
Partially	8,547,723	8,296,424	9,015,210	6,632,283	12,833,148	7,612,912	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	7,393,920	9,005,776	7,124,629	6,083,371			
<b>MEMBERS</b>												
<b>DONORS</b>												
<b>VOLUNTEERS</b>												
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: SU - Corporate US For Period September 30, 2025												
Description	CURRENT PERIOD				YEAR TO DATE				Sep-25 Actual	Sep-24 Actual	Sep-25 Actual (YTD)	
	Sep-25 Actual	Sep-24 Actual	Sep-24 Actual (YTD)	Sep-25 Actual (YTD)	Actual	Var (YTD)	Actual	Var (YTD)				
By Grant												
G013 Wildlife Conservation Effort	4,709,696	3,892,014	7,727,082	4,153,856	16,998,355	7,715,079	24,605,216	12,443,236				
G009 Agricultural Innovation	4,508,945	1,021,818	3,587,107	7,737,836	25,722,295	21,634,842	22,402,000	22,352,518				
G015 Disaster Relief Fund	3,524,879	3,364,609	160,270	4,455	21,347,303	1,005,223	22,352,518	1,005,223				
G010 Mental Health Services	2,938,075	1,971,269	986,850	32,915	24,049,761	21,750,395	22,999,3	22,999,3				
G005 Community Arts Development	2,920,641	1,514,406	1,406,235	48,156	20,220,889	20,084,342	136,3	136,3				
G012 Public Health Improvement	2,680,601	4,021,461	4,021,461	4,021,461	18,464,461	18,464,461	18,464,461	18,464,461				
G011 Literacy Expansion Project	2,618,724	3,896,647	720,077	27,527	25,544,006	25,352,533	191,4	191,4				
G007 Rural Education Initiative	2,457,377	2,879,779	422,618	17,20%	19,443,025	23,615,561	41,727,5	41,727,5				
G003 Technology Access Initiative	1,284,706	2,525,151	130,905	15,15%	20,467,107	22,886,051	24,420,5	24,420,5				
G002 Homeless Support Network	1,270,706	3,000,451	1,091,492	10,90%	22,047,200	20,991,820	22,352,518	22,352,518				
G019 Food Security Campaign	1,760,099	2,437,629	691,930	39,16%	25,341,406	21,317,979	4,000,4	4,000,4				
G018 Renewable Energy Study	1,700,281	1,463,767	236,514	13,91%	18,456,745	18,456,745	18,456,745	18,456,745				
G017 Workforce Training Program	1,687,095	4,075,415	2,388,320	141,56%	22,229,026	22,277,248	43,7	43,7				
G004 Cultural Heritage Preservation	1,249,000	1,414,761	1,109,240	7,69%	21,789,200	21,789,200	21,789,200	21,789,200				
G002 Urban Health Outreach	1,193,259	1,494,605	301,406	16,61%	21,934,487	19,540,217	23,942,2	23,942,2				
G020 Infrastructure Upgrade Grant	889,215	2,375,473	1,486,258	167,14%	17,817,110	22,819,677	5,002,5	5,002,5				
<b>TOTAL AMOUNT AWARDED</b>	<b>42,676,944</b>	<b>49,383,610</b>	<b>6,706,666</b>	<b>15,71%</b>	<b>454,782,609</b>	<b>454,975,237</b>	<b>192,6</b>					
By Grant Manager												
Lisa Potomelar	2,676,944	1,255,000	1,421,944	53,12%	8,435,900	7,499,000	936,9					

## 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: SU - Corporate US For Period Ending September 30, 2025												
Grant ID	Grant Description	CURRENT PERIOD				YEAR TO DATE				Sep-25 Actual	Sep-24 Actual	Sep-25 Actual (YTD)
		Sep-25 Actual	Sep-24 Actual	Sep-24 Actual (YTD)	Sep-25 Actual (YTD)	Actual	Var (YTD)	Actual	Var (YTD)			
G013 Wildlife Conservation Effort	2,407,124	1,879,756	1,424,045	1,424,045	7,207,077	7,207,077	1,72%	1,72%	2,616,724	25,544,006	25,352,533	23,615,561
G002 Urban Health Outreach	1,193,259	1,466,655	1,301,609	1,301,609	3,153,259	3,153,259	1,15,356	1,15,356	21,934,487	19,540,217	19,540,217	18,464,842
G003 Clean Water Project	2,184,706	2,515,611	1,330,905	1,330,905	5,184,235	5,184,235	2,184,706	2,184,706	27,341,406	22,352,518	22,352,518	21,347,303
G003 Clean Water Project	830,183	3,019,699	2,189,518	2,189,518	7,830,183	7,830,183	27,707,118	27,707,118	21,750,395	21,750,395	21,750,395	21,750,395
G005 Community Arts Development	2,920,641	1,514,406	1,406,235	1,406,235	4,798,819	4,798,819	2,920,641	2,920,641	20,220,889	20,084,342	20,084,342	18,464,461
G007 Renewable Energy Study	1,700,281	1,463,767	236,514	236,514	3,709,281	3,709,281	18,456,745	18,456,745	18,456,745	18,456,745	18,456,745	18,456,745
G007 Renewable Energy Study	1,700,281	1,463,767	236,514	236,514	3,709,281	3,709,281	18,456,745	18,456,745	18,456,745	18,456,745	18,456,745	18,456,745
G008 Public Safety Enhancement	2,669,036	4,014,880	1,345,844	1,345,844	5,020,426	5,020,426	2,669,036	2,669,036	24,954,461	22,488,044	22,488,044	21,347,303
G009 Agricultural Innovation	4,608,945	1,021,838	3,587,107	3,587,107	17,737,245	17,737,245	4,608,945	4,608,945	25,721,285	21,624,842	21,624,842	20,449,761
G010 Mental Health Services	2,938,075	1,971,269	986,850	986,850	32,915	32,915	2,938,075	2,938,075	24,049,761	21,750,395	21,750,395	20,449,761
G011 Literacy Expansion Project	2,616,724	1,896,647	720,077	720,077	4,798,819	4,798,819	2,616,724	2,616,724	25,544,006	25,352,533	25,352,533	23,615,561
G011 Literacy Expansion Project	2,616,724	1,896,647	720,077	720,077	4,798,819	4,798,819	2,616,724	2,616,724	25,544,006	25,352,533	25,352,533	23,615,561
G013 Wildlife Conservation Effort	877,000	1,245,605	3,982,000	3,982,000	1,15,356	1,15,356	877,000	877,000	21,934,487	19,540,217	19,540,217	18,464,842
G014 Technology Access Initiative	866,645	1,466,050	599,405	599,405	6,091,645	6,091,645	866,645	866,645	22,352,518	22,352,518	22,352,518	21,347,303
G015 Disaster Relief Fund	3,524,879	3,364,609	160,270	45,556	3,524,879	3,524,879	3,524,879	3,524,8				

# Member Reports

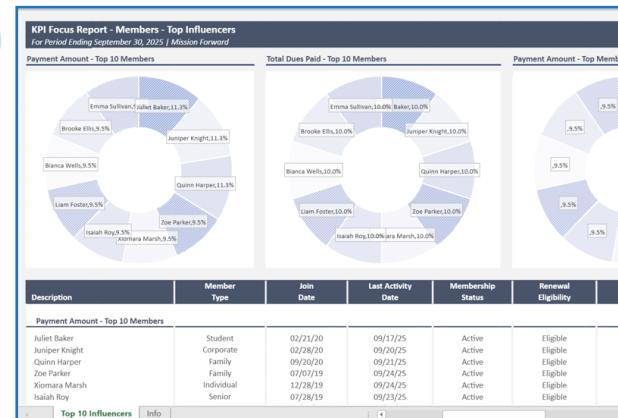
## V04\_R01b - Transaction Detail - Members

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	Willa Evans	Senior	Cancelled	4/30/2017	10/9/2025	9/19/2025	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		
M1106	Katie Hartner	Student	Cancelled	9/28/2017	10/10/2025	9/27/2025	9/22/2025	Eligible		
M1121	Quinn Hill	Individual	Cancelled	2/9/2017	9/8/2025	9/23/2025	9/18/2025	Eligible		
M1124	Talia Murphy	Individual	Cancelled	8/15/2015	10/1/2025	9/3/2025	9/28/2025	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	Dorothy Myers	Senior	Active	1/28/2018	9/31/2025	9/24/2025	9/19/2025	Eligible		
M1135	Eva Hart	Senior	Active	8/7/2019	10/1/2025	9/18/2025	9/13/2025	Eligible		
M1136	Faith Kelly	Corporate	Cancelled	4/9/2017	10/4/2025	9/23/2025	9/18/2025	Eligible		
M1139	Isaiah Roy	Senior	Active	7/28/2019	10/7/2025	9/23/2025	9/18/2025	Eligible		
M1140	Julie Baker	Student	Active	2/1/2020	9/29/2025	9/17/2025	9/12/2025	Eligible		
M1143	Milo West	Individual	Cancelled	3/26/2016	10/19/2025	9/8/2025	9/3/2025	Not Eligible		
M1145	Miner West	Student	Cancelled	5/2/2017	10/20/2025	9/23/2025	9/18/2025	Eligible		
M1143	Miner West	Student	Cancelled	10/4/2017	9/20/2025	9/17/2025	9/12/2025	Not Eligible		
M1146	Poppo 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	12/28/2019	10/3/2025	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	1/11/2016	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		

## 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		
<b>GRANTS</b>												
<b>MEMBERS</b>												
Payment Amount by Membership Status												
Active	11,928	14,097	11,300	10,528	18,146	12,142	14,175	17,760	12,936	14,175		
Cancelled	13,612	14,478	18,532	15,792	13,082	17,279	20,475	11,988	16,072	17,152		
Lapsed	17,040	9,525	15,368	11,280	10,972	17,279	17,850	14,652	10,192	14,175		
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		
Family	6,816	6,858	10,848	9,024	7,596	10,741	7,875	10,212	5,880	6		
Individual	10,650	8,382	9,492	8,648	6,330	4,203	11,559	9,324	12,152	9		
Senior	4,686	7,239	8,588	9,400	8,440	11,675	11,550	11,100	7,840	8		
Student	11,928	8,382	7,232	4,512	11,394	7,472	11,025	7,104	6,664	11		
<b>DONORS</b>												
<b>VOLUNTEERS</b>												

## 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						
CURRENT PERIOD						
Description	Sep - 2025 Actual	Sep - 2024 Actual (Yr)	Actual Var (YoY)	Actual Var % (YoY)	Sep - 2025 Actual	Sep - 2024 Actual (Yr)
By Member Type						
Family	8,594	6,816	1,778	▲20.69%	67,594	67,594
Individual	6,440	10,650	(4,210)	▼65.37%	76,887	76,887
Student	5,320	11,928	(6,608)	▼124.21%	75,587	75,587
Senior	5,040	4,686	354	▲7.02%	79,354	79,354
Corporate	9,400	8,520	880	▲9.36%	70,878	70,878
TOTAL PAYMENTS	34,794	42,600	(7,806)	▼22.43%	370,300	370,300
By Membership Status						
Active	9,800	11,928	(2,128)	▼21.71%	123,470	123,470
Lapsed	19,377	17,040	2,337	▲12.06%	118,652	118,652
Cancelled	14,559	13,632	927	▲6.37%	128,178	128,178
TOTAL PAYMENTS	43,736	42,600	1,136	▲2.60%	370,300	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						
Period Ending September 30, 2025						
Sort on Variance and Variance % columns to see the largest/smallest variances						
Member ID	Member Name	Sep - 25 Actual	Sep - 24 Actual (Yr)	Actual Var (YoY)	Sep - 25 Actual	Year to Date Actual (Yr)
M1156	Zion Dean	138	138	-	418	883
M1143	Milo West	97	97	-	186	364
M1095	Quade Silva	91	91	-	356	116
M1009	Henry Brooks	78	78	-	227	134
M107	Seth Vega	75	75	-	152	397
M1174	Ray Brooks	75	75	-	372	111
M1383	Alana Cruz	68	68	-	470	100
M1164	Holden Cole	68	68	-	266	44
M1013	Mia Henderson	66	107	(41)	114	310
M1039	Madison Bell	66	66	-	102	135
M1102	Logan Hall	63	63	-	324	507
M1104	Zane Brooks	56	47	▲16.07%	56	113
M1222	Nina Hunt	56	107	(51)	160	212
M1197	Omar Young	56	118	(62)	348	368
M1017	Quinn Harper	56	56	-	392	380
M1218	Juniper Knight	56	56	-	146	94
M1113	Cedric Long	56	56	-	130	66
M1015	Olivia Stewart	56	56	-	237	96
M1140	Juliet Baker	56	56	-	211	-
M1038	Hunter Reed	47	47	-	86	243
M1139	Isaiyah Roy	47	47	-	143	343
M1024	Brooklyn Ellis	47	71	(24)	125	277
M1011	Eric Mitchell	47	214	(167)	230	383
M1053	Aiden Murphy	47	53	(6)	188	310
M1052	Zoe Parker	47	53	(6)	194	238

## Donor Reports

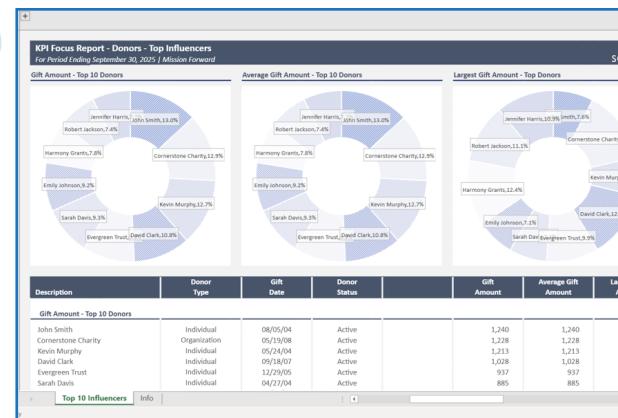
### V04\_R01c - Transaction Detail - Donors

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	Gift Amount	Largest Gift Amount	Total Gift Amount	Total Gift Count
DNR0051	Christine Kim	Active	Individual	9/7/2025	144	1,623	6,203	6,203	1
DNR0051	Urban Education	Active	Individual	9/9/2025	584	5,517	12,720	12,720	1
DNR0052	Amanda Foster	Active	Individual	9/6/2025	159	2,394	6,307	6,307	1
DNR0053	Peter Hughes	Active	Individual	9/9/2025	141	2,499	6,358	6,358	1
DNR0054	Rebecca Bennett	Active	Individual	9/8/2025	648	5,016	18,750	18,750	1
DNR0055	Visionary Donors	Active	Individual	9/26/2025	691	3,599	12,486	12,486	1
DNR0056	Vincent Murphy	Active	Individual	9/17/2025	1,556	3,459	12,237	12,237	1
DNR0060	Pathway Grants	Active	Individual	9/16/2025	617	2,322	6,173	6,173	1
DNR0061	Catherine Long	Active	Organization	9/23/2025	681	5,763	12,557	12,557	1
DNR0062	Samantha Hall	Active	Organization	9/20/2025	442	5,974	12,557	12,557	1
DNR0063	Lighthouse Fund	Active	Organization	9/19/2025	629	3,217	12,742	12,742	1
DNR0064	Angela Stewart	Active	Organization	9/30/2025	871	3,930	12,840	12,840	1
DNR0065	Richard Ortiz	Active	Organization	9/17/2025	498	2,189	5,974	5,974	1
DNR0068	Joseph Diaz	Active	Organization	9/18/2025	1,166	6,915	18,727	18,727	1
DNR0069	Solidarity Network	Active	Organization	9/27/2025	168	1,484	6,209	6,209	1
DNR0070	Lauren Baker	Active	Organization	9/17/2025	472	4,419	12,630	12,630	1
DNR0072	Community Charity	Active	Organization	9/7/2025	1,258	3,663	12,903	12,903	1
DNR0073	Stephanie Cook	Active	Organization	9/3/2025	617	4,966	12,903	12,903	1
DNR0074	Eric Sanders	Active	Organization	9/23/2025	221	1,544	6,174	6,174	1
DNR0075	Oasis Support Group	Active	Organization	9/21/2025	232	2,344	6,497	6,497	1
DNR0076	Melissa Flores	Active	Organization	9/10/2025	253	2,325	6,330	6,330	1
DNR0077	Jonathan Reed	Active	Organization	9/27/2025	143	1,744	6,022	6,022	1
DNR0079	Kimberly Hayes	Active	Organization	9/28/2025	717	4,513	12,402	12,402	1

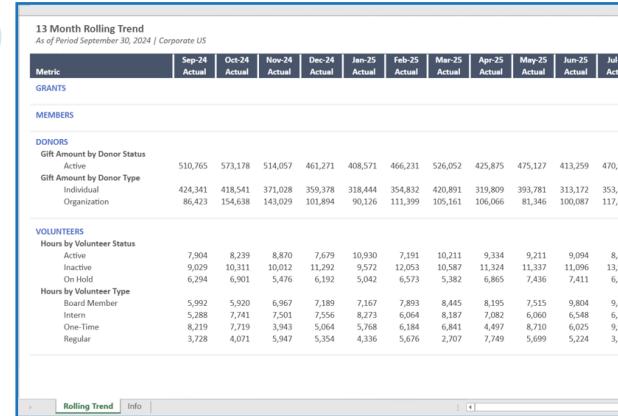
V04\_R03c - Top 10 Report - Donors

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.



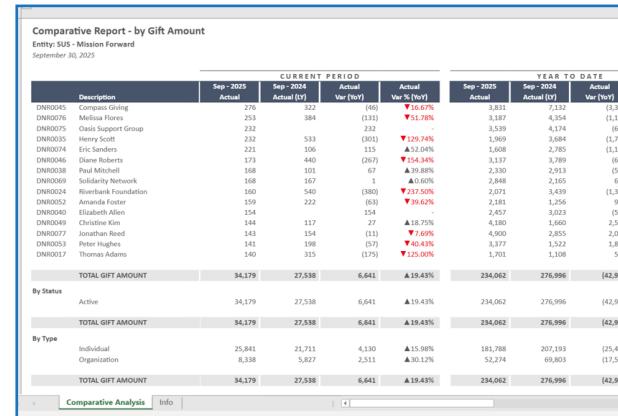
## V04\_R04 - 13 Month Rolling Trend - Nonprofit Metrics

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.



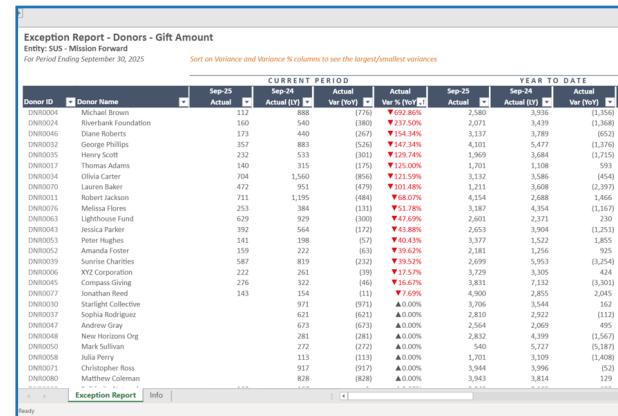
## V04\_R06c - Comparative Report - Donors

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.



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.



# Volunteer Reports

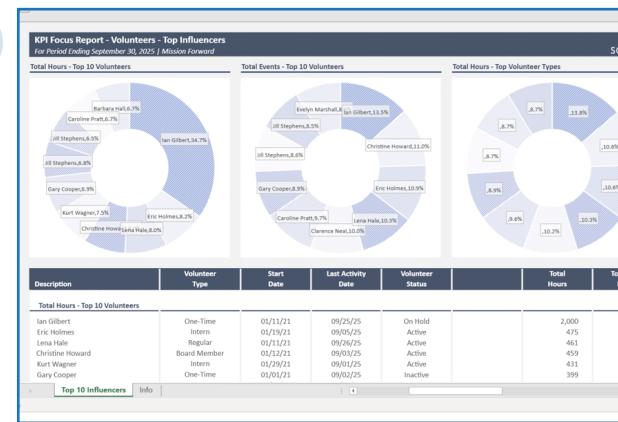
## V04\_R01d - Transaction Detail - Volunteers

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	1/1/2021	9/30/2025	370				
V0186	Lena Hale	Active	Regular	1/1/2021	9/26/2025	354				
V0187	Troy Burgess	Active	Regular	1/8/2021	9/23/2025	354				
V0190	Vicki Larson	Inactive	Intern	1/6/2021	9/2/2025	194				
V0190	Vicki Larson	Inactive	Intern	1/6/2021	9/2/2025	211				
V0198	Karen Lash	Active	Board Member	1/4/2021	9/30/2025	297				
V0200	Regina Cohen	Active	One-Time	1/15/2021	9/23/2025	321				
V0201	Herman Steele	Active	Board Member	1/8/2021	9/18/2025	361				
V0209	Gilbert Norman	On Hold	Board Member	1/1/2021	9/15/2025	242				
V0210	Tricia Lundy	Inactive	One-Time	1/1/2021	9/18/2025	258				
V0215	Ackie Keller	Active	Board Member	1/6/2021	9/20/2025	283				
V0216	Michele Lyons	Active	One-Time	1/1/2021	9/19/2025	323				
V0224	Renee Carr	Active	Intern	1/1/2021	9/12/2025	242				
V0250	Loretta Wise	Inactive	Regular	1/2/2021	9/28/2025	274				
V0253	Tanya Lee	Active	Board Member	1/8/2021	9/28/2025	273				
V0237	Isaac Moody	Inactive	One-Time	1/5/2021	9/21/2025	228				
V0239	Lester Klein	Inactive	Regular	1/13/2021	9/21/2025	314				
V0241	Ross Norton	Active	One-Time	1/31/2021	9/1/2025	274				
V0246	Sue Harmon	Active	One-Time	1/2/2021	9/20/2025	361				
V0248	Sue Harmon	Inactive	Intern	1/1/2021	9/5/2025	351				
V0250	Ethel Floyd	Active	Intern	1/10/2021	9/15/2025	236				
V0250	Clara Barton	Active	Intern	1/9/2021	9/13/2025	342				

## 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
<b>GRANTS</b>												
<b>MEMBERS</b>												
<b>DONORS</b>												
<b>VOLUNTEERS</b>												
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	13,686
Inactive	9,029	10,311	10,012	11,292	9,572	12,053	10,587	11,324	11,337	11,096	13,986	9,991
On Hold	6,294	6,901	5,476	6,192	5,042	6,573	5,382	6,865	7,436	7,411	6,882	4,721
Hours by Volunteer Type												
Board Member	5,992	5,920	6,967	7,189	7,157	8,893	8,445	8,195	7,515	9,804	9,470	9,677
Intern	5,388	7,741	7,501	7,556	8,273	6,064	8,187	7,082	6,060	6,548	6,112	6,585
One-Time	8,219	7,719	3,943	5,064	5,768	6,184	6,841	4,497	8,710	6,025	9,968	5,548
Regular	3,728	4,071	5,947	5,354	4,336	5,676	2,707	7,749	5,699	5,224	3,737	6,600

## 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 Volunteer									
Entity: SUS - Mission Forward									
September 30, 2025									
							CURRENT PERIOD		
Description	Sep - 2025 Actual	Sep - 2024 Actual (Y)	Actual Var (YoY)	Actual Var % (YoY)	Sep - 2025 Actual	Sep - 2024 Actual (Y)	Actual Var (YoY)	Sep - 2025 Actual	Sep - 2024 Actual (Y)
By Volunteer Type									
One-Time	8,398	8,219	179	▲2.13%	61,939	52,411	9,528	61,939	52,411
Intern	7,703	5,268	2,415	▲31.85%	62,611	47,538	15,063	62,611	47,538
Board Member	7,274	5,992	1,282	▲22.29%	75,452	56,537	32,915	75,452	56,537
Regular	6,108	3,728	2,372	▲38.89%	47,838	35,549	12,271	47,838	35,549
<b>TOTAL HOURS</b>	<b>29,475</b>	<b>23,227</b>	<b>6,248</b>	<b>▲21.20%</b>	<b>247,821</b>	<b>193,668</b>	<b>54,153</b>	<b>247,821</b>	<b>193,668</b>
By Volunteer Status									
Active	13,792	7,964	3,888	▲32.97%	89,868	62,097	22,771	89,868	62,097
Inactive	9,262	9,029	213	▲2.32%	99,219	73,221	23,988	99,219	73,221
On Hold	8,416	6,294	2,122	▲25.21%	58,734	51,356	7,378	58,734	51,356
<b>TOTAL HOURS</b>	<b>29,475</b>	<b>23,227</b>	<b>6,248</b>	<b>▲21.20%</b>	<b>247,821</b>	<b>193,668</b>	<b>54,153</b>	<b>247,821</b>	<b>193,668</b>
By Volunteer [Top 10 listed]									
V0049 Ian Gilbert	1,184	230	954	▲80.57%	1,947	846	1,101	1,947	846
V0084 Jill Stephens	769	769	-	-	1,792	1,779	13	1,792	1,779
V0246 Sue Harmon	720	249	471	▲65.42%	2,556	1,273	1,283	2,556	1,273
V0084 Pamela Kelly	712	248	464	▲65.37%	1,669	938	731	1,669	938
V0049 Michael	637	637	0	-	1,516	518	1,000	1,516	518
V0091 Terry Hunter	670	670	-	-	2,069	399	1,670	2,069	399
V0099 Harry Weiser	659	659	-	-	1,396	434	962	1,396	434
V0078 Evelyn Marshall	605	605	-	-	2,089	901	1,188	2,089	901
V0085 Arthur Lutz	563	563	-	-	1,881	877	1,000	1,881	877
V0058 Amanda Hughes	561	189	372	▲66.31%	1,512	530	982	1,512	530
<b>TOTAL HOURS</b>	<b>7,116</b>	<b>916</b>	<b>6,200</b>	<b>▲87.13%</b>	<b>17,474</b>	<b>8,495</b>	<b>8,959</b>	<b>17,474</b>	<b>8,495</b>
Comparative Analysis   Info									

## 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 - Hol									
Entity: SUS - Mission Forward									
For Period Ending September 30, 2025									
							YEAR TO DATE		
Volunteer ID	Volunteer Name	Act vs Bud Var (CP)	Act vs Bud Var % (CP)	Sep - 25 Actual	Sep - 25 Actual (Y)	Sep - 25 Budget	Act	Actual	Actual Var % (YoY)
V0083	Gregory Knight	-	-	1,270	1,051	(181)	1,270	1,051	▲21.25%
V0037	Brian Stewart	-	-	578	650	(72)	578	650	▼14.46%
V0187	Troy Burgess	354	-	1,345	1,507	(162)	1,345	1,507	▼12.04%
V0127	Stanley Odell	-	-	1,035	1,277	(126)	1,035	1,277	▼18.95%
V0051	Mark Thompson	-	-	847	929	(82)	847	929	▼8.48%
V0200	Regina Cohen	321	-	1,503	1,612	(109)	1,503	1,612	▼7.25%
V0081	Bruce Gordon	358	-	1,040	1,112	(72)	1,040	1,112	▼6.92%
V0052	Diane Russell	-	-	826	876	(50)	826	876	▼6.05%
V0105	Arthur Land	563	-	828	877	(49)	828	877	▼6.92%
V0185	Sarah Bennett	-	-	642	666	(24)	642	666	▼3.63%
V0185	Max Robbins	-	-	339	354	(15)	339	354	▼4.22%
V0095	Philip Hayes	-	-	778	810	(32)	778	810	▼4.11%
V0219	Ruben Boone	-	-	1,268	1,303	(35)	1,268	1,303	▼2.76%
V0092	Louise Bryant	547	-	795	814	(19)	795	814	▼2.39%
V0177	Neil Goodman	331	-	967	985	(18)	967	985	▼1.86%
V0043	Neil Goodman	-	-	1,320	1,342	(27)	1,320	1,342	▼1.64%
V0044	Brenda Hill	-	-	379	379	(379)	379	379	▲0.00%
V0054	Rebecca Ward	-	-	726	726	(726)	726	726	▲0.00%
V0214	Lynn Barber	-	-	499	499	(499)	499	499	▲0.00%
V0194	Lori Nichols	-	-	1,898	1,898	(1,898)	1,898	1,898	▲0.00%
V0201	Grant Nichols	-	-	1,232	1,232	(1,232)	1,232	1,232	▲0.00%
V0202	Hannah Steele	361	-	1,378	1,372	6	1,378	1,372	▲0.44%
V0184	Jill Stephens	769	-	1,792	1,779	13	1,792	1,779	▲0.73%
V0211	Homer Glenn	-	-	241	231	10	241	231	▲4.15%
V0240	Heidi Riley	-	-	802	745	57	802	745	▲7.11%
V0089	Wayne Palmer	342	-	1,310	1,212	98	1,310	1,212	▲7.48%
<b>TOTAL HOURS</b>	<b>29,475</b>	<b>23,227</b>	<b>6,248</b>	<b>▲21.20%</b>	<b>247,821</b>	<b>193,668</b>	<b>54,153</b>	<b>247,821</b>	<b>193,668</b>
Exception Report   Info									

# People Power: Unlocking Workforce Insights with Solver

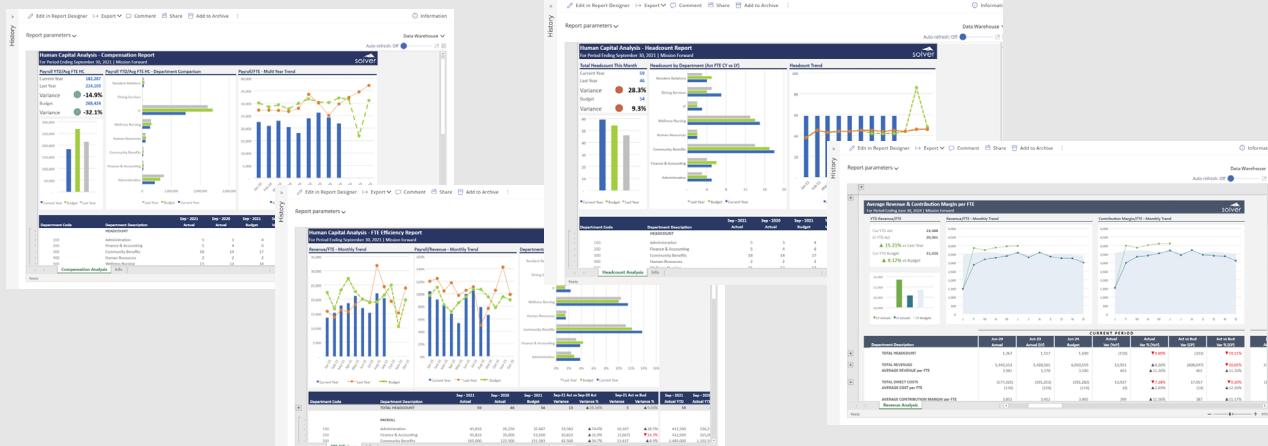
Workforce management in nonprofits is a delicate dance—balancing staff costs, volunteer contributions, and program demands with limited budgets. HR managers and executives often struggle with outdated tools that fail to provide a clear picture of headcount trends, compensation efficiency, or revenue 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.



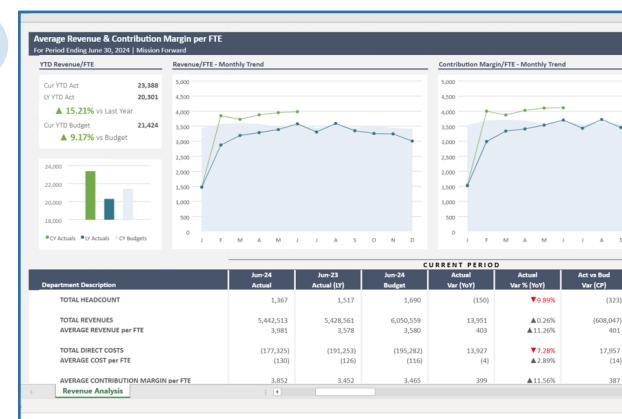
Click here to visit Solver's Showcase for full screen views of these and other templates.



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.



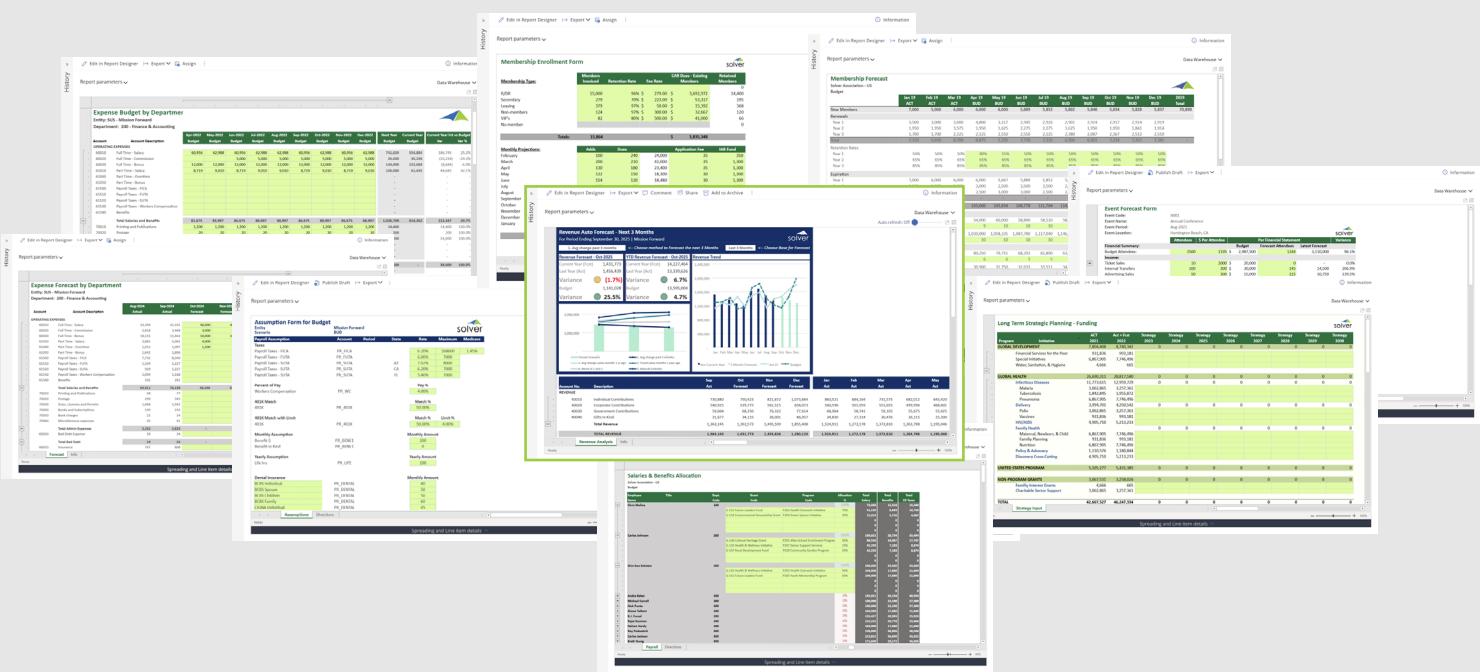
# Plan with Purpose: Simplifying Nonprofit Budgeting with Solver

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.



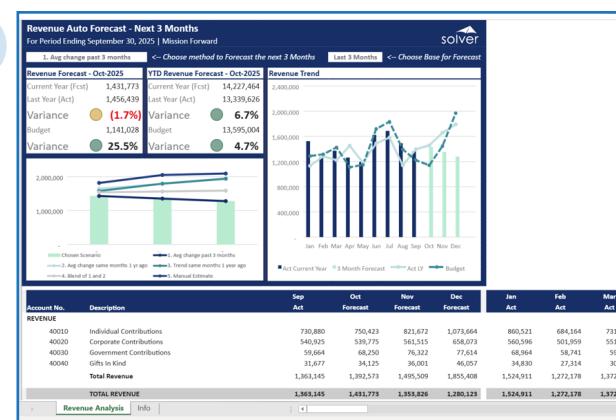
Click here to visit Solver's Showcase for full screen views of these and other templates.



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.



## V04\_F245 - Expense Forecast by Department

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: SUS - 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	
<b>OPERATING EXPENSES</b>													
60010	Full Time - Salary	33,394	41,102	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000	
60020	Full Time - Commission	2,818	3,468	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	
60030	Full Time - Bonus	10,115	11,442	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	
61010	Part Time - Salary	3,881	5,001	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	
61040	Part Time - Overtime	1,012	1,097	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	
61050	Part Time - Bonus	1,642	1,806										
61060	Payroll Taxes - FICA	7,732	8,340										
61510	Payroll Taxes - FUTA	1,104	1,237										
61520	Payroll Taxes - SUTA	929	1,227										
61530	Payroll Taxes - Workers Compensation Benefits	1,094	1,168										
61540	Benefits	191	261										
		<b>63,911</b>	<b>76,133</b>	<b>58,200</b>	<b>58,200</b>	<b>58,200</b>	<b>58,200</b>	<b>58,200</b>	<b>58,200</b>	<b>58,200</b>	<b>58,200</b>	<b>58,200</b>	
70010	Printing and Publications	58	77										
70020	Postage	299	345										
70030	Dues, Licenses and Permits	1,668	1,942										
70040	Books and Subscriptions	149	153										
70050	Bank charges	22	24										
70060	Miscellaneous expenses	35	41										
		<b>2,232</b>	<b>2,623</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>22,174</b>	
65010	Bad Debt Expense	19	24									193	
		<b>19</b>	<b>24</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>193</b>	
66010	Insurance	767	868									7,741	
		<b>767</b>	<b>868</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>7,741</b>	
<b>Forecast</b>   <b>Info</b>													

Spreading and Line item details ▾

## V04\_F820a and b - Employee Payroll Budget with Assumptions

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 Scenario		Mission Forward BUD		solver								
Payroll Assumption	Account	Period	State	Rate	Maximum	Medicare	Pay %					
Taxes							4.00%					
Payroll Taxes - FICA	PR_FICA			6.00%	168,600	1.45%						
Payroll Taxes - FUTA	PR_FUTA			0.00%	7,000							
Payroll Taxes - SUTA	PR_SUTA	AZ		7.02%	8,000							
Payroll Taxes - SUITA	PR_SUITA	CA		6.20%	2,000							
Payroll Taxes - SUTA	PR_SUTA	FL		5.40%	7,000							
Percent of Pay												
Workers Compensation	PR_WC											
401K Match	PR_401K											
401K												
401K Match with Limit	PR_401K											
401K												
Monthly Assumption												
Benefits %	PR_BENE1											
Benefit in Kind	PR_BENE1											
Yearly Assumption												
Life Ins	PR_LIFE											
Dental Insurance												
Electrical	PR_DENTAL											
BCBS Spouse	PR_DENTAL											
BCBS Children	PR_DENTAL											
BCBS Family	PR_DENTAL											
OGNA Individual	PR_DENTAL											
<b>Payroll Budget</b>												
Entity Scenario		Mission Forward BUD		solver								
Employees	Title	Date	Hire Date	Month	End Month	Hours	Annual Hours	Pay Rate	Annual Pay	Hours	Month	% Increase
Administrative Employees	Supervisor	7/7/2007				2,000.00	51,133	51,133				0%
Chris Martin	Manager	6/1/2006				2,000.00	51,060	51,060				0%
Luis Perenika	Associate	5/1/2005				2,000.00	174,720	174,720				0%
Chris Jackson	Assistant	Aug				2,080.00	120,000	120,000				0%
Chris Jackson	Contractor	4/13/2004				2,080.00	15	31,200				0%
Sarah Parker	Lead Researcher	12/1/2008				2,080.00	14	27,360				0%
Chris Jackson	Associate Researcher	5/12/2008				2,080.00	18	37,440				0%
Orlando Lametta	AI Specialist	12/10/1997				2,080.00	20	41,600				0%
<b>Salaries &amp; Benefits Allocation</b>												
Solver Association - US Budget		Salaries & Benefits Allocation										
Employee Name	Title	Dept. Code	Grant Code	Program Code	Allocation %	Total Salary	Total Benefits	Total ER Taxes				
Chris Medina	200	100			100%	79,250	22,618	15,540				
			G-131 Future Leaders Fund	P201 After School Enrichment Program	70%	\$1,133	\$8,683	10,788				
			G-131 Health & Wellness Initiative	P201 Health Outreach Initiative	30%							
Carlos Johnson	200					21,913	8,726	4,402				
			G-138 Cultural Heritage Grant	P201 After School Enrichment Program	100%	169,251	28,794	35,880				
			G-138 Health & Wellness Initiative	P201 Health Outreach Initiative	50%	\$4,510	\$4,367	37,747				
			G-137 Health Development Fund	P201 Senior Support Services	25%	42,255	7,188	8,874				
Shin-Sea Eckstein	200					21,913	8,726	4,402				
			G-137 Future Leaders Fund	P201 Community Garden Program	25%	42,255	7,188	8,874				
Andre Baker	200					195,023	33,354	40,954				
Michelle Carroll	200					130,000	22,200	27,300				
Shane Parks	200					100,000	22,000	24,000				
Shane Tolbert	200					130,000	37,680	21,640				
B.J. Furtal	200					123,427	20,983	25,920				
Rajiv Guzman	200					122,000	21,740	24,560				
Johnna Avery	200					122,000	17,480	21,280				
Ray Padronik	300					238,000	38,896	48,048				
Charles Jackson	300					215,821	36,600	43,322				
Brett Young	300					271,600	29,172	34,036				
<b>Spreading and Line item details ▾</b>												

## V04\_F999\_DEMO - Salaries and Benefits Allocation

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											
Solver Association - US Budget		Salaries & Benefits Allocation									
Employee Name	Title	Dept. Code	Grant Code	Program Code	Allocation %	Total Salary	Total Benefits	Total ER Taxes			
Chris Medina	200	100			100%	79,250	22,618	15,540			
			G-131 Future Leaders Fund	P201 After School Enrichment Program	70%	\$1,133	\$8,683	10,788			
			G-131 Health & Wellness Initiative	P201 Health Outreach Initiative	30%						
Carlos Johnson	200					21,913	8,726	4,402			
			G-138 Cultural Heritage Grant	P201 After School Enrichment Program	100%	169,251	28,794	35,880			
			G-138 Health & Wellness Initiative	P201 Health Outreach Initiative	50%	\$4,510	\$4,367	37,747			
			G-137 Health Development Fund	P201 Senior Support Services	25%	42,255	7,188	8,874			
Shin-Sea Eckstein	200					21,913	8,726	4,402			
			G-137 Future Leaders Fund	P201 Community Garden Program	25%	42,255	7,188	8,874			
Andre Baker	200					195,023	33,354	40,954			
Michelle Carroll	200					130,000	22,200	27,300			
Shane Parks	200					100,000	22,000	24,000			
Shane Tolbert	200					130,000	37,680	21,640			
B.J. Furtal	200					123,427	20,983	25,920			
Rajiv Guzman	200					122,000	21,740	24,560			
Johnna Avery	200					122,000	17,480	21,280			
Ray Padronik	300					238,000	38,896	48,048			
Charles Jackson	300					215,821	36,600	43,322			
Brett Young	300					271,600	29,172	34,036			
<b>Spreading and Line item details ▾</b>											

## 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 ACT	Feb 19 ACT	Mar 19 ACT	Apr 19 BUD	May 19 BUD	Jun 19 BUD	Jul 19 BUD	Aug 19 BUD	Sep 19 BUD	Oct 19 BUD
New Members	7,000	5,000	6,000	6,000	6,000	6,000	5,889	5,852	5,802	5,84
Renewals										
Year 1	3,500	3,000	3,000	4,800	3,117	2,945	2,926	2,901	2,92	
Year 2	1,950	1,950	3,575	1,950	1,625	2,275	2,275	1,625	1,95	
Year 3	1,700	1,700	2,125	2,125	2,550	2,550	2,125	2,380	2,08	
Total	7,150	6,650	8,700	8,875	7,292	7,770	7,326	6,906	6,906	6,906
Retention Rates										
Year 1	50%	50%	50%	80%	55%	50%	50%	50%	50%	50%
Year 2	65%	65%	65%	65%	65%	65%	65%	65%	65%	65%
Year 3	85%	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	5,802	5,84
Year 2	3,000	3,000	5,500	3,000	2,500	3,500	3,500	2,500	2,500	3,00
Year 3	2,000	2,000	2,500	2,500	3,000	3,000	2,500	2,800	2,800	2,45
Total	-	-	-	-	-	-	-	-	-	-
Total Members	100,000	105,000	110,000	103,000	105,834	108,778	111,704	114,605	117,52	
Revenue										
42010 Application Revenue	70,000	50,000	60,000	54,000	60,000	58,890	58,520	58,020	58,48	
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					
Membership Type:	Members Invoiced	Retention Rate	Fee Rate	CAR Dues - Existing Members	Retained Members
R/R/R	15,000	96%	\$ 27,00	\$ 3,602,972	0
Secondary	279	70%	\$ 22,00	\$ 53,317	195
Leasing	379	97%	\$ 50,00	\$ 15,392	368
Non-members	124	97%	\$ 300,00	\$ 32,667	120
VIP's	82	80%	\$ 500,00	\$ 41,000	66
No member					
<b>Totals:</b>	<b>15,864</b>			<b>\$ 3,835,348</b>	
Monthly Projections:	Adds	Dues	Application Fee	IAR Fund	
February	100	240	24,000	35	350
March	200	42,000	35	350	
April	130	180	23,00	35	350
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	4,290	25	1,300
December	200	15	3,000	25	1,300
January	100	10	1,000	25	1,300
<b>Totals:</b>	<b>1,754</b>	<b>\$ 1,225,00</b>	<b>\$ 176,020</b>	<b>\$ 350</b>	<b>\$ 14,650</b>

## 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				
Attendee Summary:	Attendees	\$ Per Attendee	Budget	Per Financial Statement	Variance
Budget Attendees:	2500	1195 \$	2,987,500	1244	3,120,000 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	800 625.0%
Total Income:			<b>\$ 3,122,500</b>	<b>\$ 1,684</b>	<b>3,136,050 99.6%</b>
Expenses:					
Space	1	40000 \$	40,000	1	40,000 100.0%
Food/Beverage	2500	525,000 \$	1600	336,000	156.3%
Decoration	100	1,000 \$	187	1,870	53.5%
Air	40	640 \$	14	224	285.7%
Printing	2500	50 \$	122	1,440	204.8%
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	20	300 \$	6,000	23	2,324 139.5%
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:			<b>\$ 2,007,212</b>	<b>\$ 5101</b>	<b>1,699,821 118.1%</b>

## 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 + Fct 2022	Strategy 2023	Strategy 2024	Strategy 2025	Strategy 2026	Strategy 2027	Strategy 2028
GLOBAL DEVELOPMENT		7,845,408	8,746,322	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		26,593,311	28,817,580	0	0	0	0	0	0
Infectious Diseases		11,773,635	12,959,759	0	0	0	0	0	0
Malaria		3,062,865	3,257,361						
Tuberculosis		1,842,845	1,958,872						
Pneumonia		6,867,905	7,746,496						
Delivery		3,994,70	4,204,042	0	0	0	0	0	0
Policy		3,040,865	3,257,361						
Vaccines		931,836	993,181						
HIV/AIDS		4,905,710	5,213,233						
Family Health				0	0	0	0	0	0
Maternal, Newborn, & Child		6,467,905	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
NON-PROGRAM GRANTS		3,067,531	3,258,026	0	0	0	0	0	0
Family Interest Grants		4,666	665						
Charitable Sector Support		3,062,865	3,257,361						
TOTAL		42,667,527	46,247,334	0	0	0	0	0	0
	Strategy Input								

# Next Steps to Impact: Start Your Solver Journey Today

By now, you've seen how Solver's xFP&A solution transforms the way nonprofits plan, report, and perform. From mastering KPIs to streamlining financial reporting, elevating operational insights, optimizing workforce strategies, and building robust budgets, Solver delivers a unified platform that empowers your Office of Finance and beyond. Its reusable templates, real-time data integration, and cloud-based flexibility address the unique challenges nonprofits face—turning complexity into clarity and potential into action. Whether you're a CFO seeking precision, an executive driving strategy, or a manager aligning operations with mission, Solver is your partner in achieving excellence.



The journey doesn't end here—it's just the beginning. Nonprofit success hinges on the ability to adapt, innovate, and demonstrate impact, and Solver equips you to do all three. Ready to see it in action? Take the next step by reaching out for a personalized demo tailored to your organization's needs—discover how Solver can solve your specific challenges.

Visit our website at [solverglobal.com](https://solverglobal.com) to download additional resources, request a free trial, or connect with our team at [solverglobal.com/sales-inquiries](https://solverglobal.com/sales-inquiries). Your mission deserves the best tools to thrive—let Solver help you unlock your nonprofit's full potential today.

For more information, to schedule a demo, or to discuss how Solver can be tailored to meet your specific needs, contact us today. Your path to operational excellence starts here.

**Visit the Nonprofit page on our website.**