

NONPROFIT OPERATIONS



SOLVING CHALLENGES THROUGH OUTSOURCING

Discover what four nonprofits gained by outsourcing to RSM

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➤ Meeting today's operational challenges

The business of running a nonprofit has become increasingly complex, and funding is tighter than ever. On a daily basis, leaders face numerous operational challenges that can reduce their nonprofit's operational efficiency, including specialized accounting needs and regulatory requirements as well as dated technology and aging on-premises infrastructure.

They often have difficulty attracting finance, accounting and IT talent, and are also hindered by staff turnover and key-person departures. A lack of resources and inefficient operations throw hurdles in their path, and data-quality issues and limited data analytics hinder their ability to make informed decisions.

RSM's outsourcing practice offers a full suite of services for overcoming nonprofit challenges and improving nonprofit operations with:

- **Fast onboarding** with our Rapid Assessment® diagnostic tool
- **Industry-leading cloud technology** that streamlines processes, increases transparency and offers improved analytics
- **A deep talent bench** of knowledgeable practitioners with years of experience working for nonprofits
- **Tailored solutions** around people, processes and technology to build a foundation of improved nonprofit efficiency
- **Strategic advisors** that possess specialized nonprofit experience to support nonprofit leaders



Washington Nationals Philanthropies

A foundation for success around people,
processes and technology

As the official charitable arm of the Washington Nationals baseball team, Washington Nationals Philanthropies (WNP) strives to foster a culture of giving within the greater Washington region. The organization has distributed more than \$8 million in grants to community partners since 2008.

Until 2018, the Washington Nationals Baseball Club operated two distinct nonprofit entities. But to pursue its mission more effectively and efficiently, the club merged their two nonprofits into one organization.

[READ THE FULL CASE STUDY](#)

CHALLENGE

Seeking efficiencies after merging operations

- › Financial complexity as a grant-making institution that also internally finances its own programs
- › Inefficient use of time to create reports, pay vendors and other tasks
- › Lack of 360-degree visibility into financials
- › Difficulty forecasting and making data-driven decisions
- › Lack of business continuity capabilities

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Moving ahead to create a united organization

With its depth of experience and keen understanding of the nuances of the nonprofit industry, the RSM team was able to quickly assess WNP's situation. RSM established a foundation for success by uniquely analyzing the organization's structure around people, processes and technology to develop tailored solutions.

STRATEGY AND SOLUTION

- › A tech-forward finance and accounting outsourcing strategy
- › Flexible, people-first approach
- › Tailored solutions unique to the organization
- › Efficient use of digital technology to maximize human capital

RESULTS

- › An easier and more robust budget process
- › Enhanced technology enabling remote work during the COVID-19 pandemic
- › More efficient systems and processes
- › Access to financial data that's timely, accurate and meaningful to the organization
- › Improved outcomes and a larger social impact in the Greater Washington region



“RSM has been a real thought partner throughout our time working together. It’s been great to see our teams interacting with each other more, and in ways that are productive. And we’ve all gotten more adept as the engagement has gone on.”

JOHN BRAMLETTE

COO, Washington Nationals Philanthropies

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Shadowserver Foundation

Rebounding from tragedy to thrive

A leading force in internet security, Shadowserver Foundation is expanding globally. However, unforeseen circumstances led to the IRS's revocation of its 501(c)(3) nonprofit status.

[READ THE FULL CASE STUDY](#)

CHALLENGES

- > Operational missteps: accounting irregularities and inconsistencies
- > Insufficient technology: reliance on Quickbooks and spreadsheets
- > Leadership void: a director who stepped away during a critical period due to a family tragedy
- > Missing talent: no permanent relationship with a skilled accounting team

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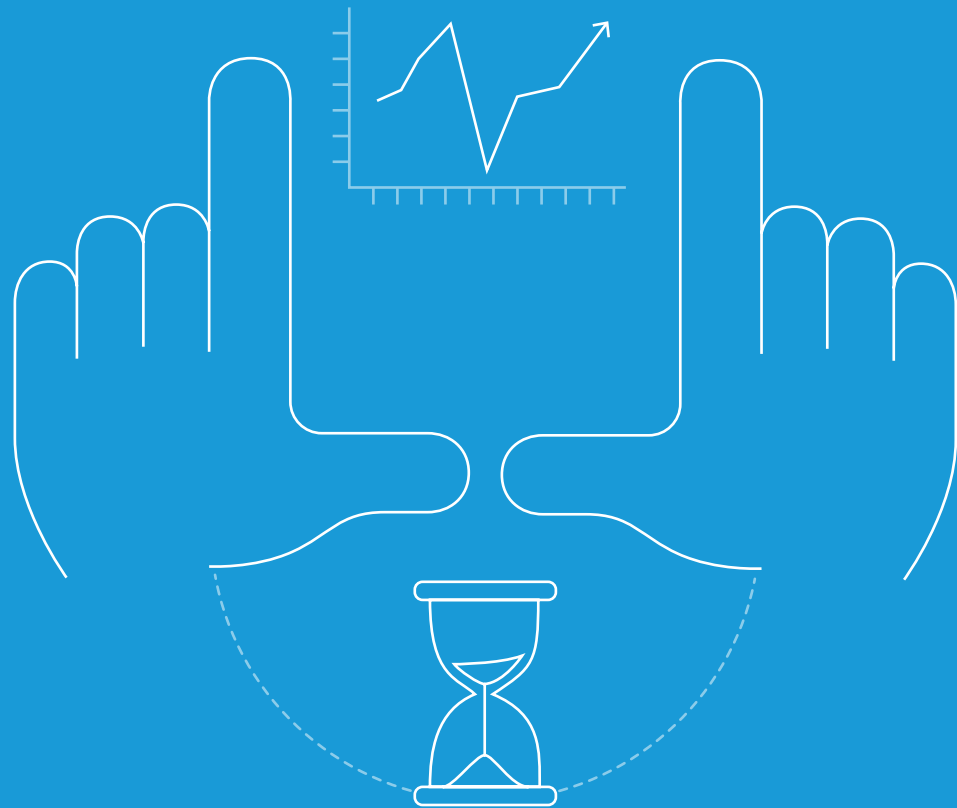
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SOLUTION AND RESULTS

- > Accounting cleanup to get the finance functionality back up and running
- > Close working relationship to meet daily and periodic needs
- > “On demand” experience as needed by drawing from other RSM practice areas
- > New technology framework to position the organization for future growth
- > Direct communication with IRS to restore nonprofit status



“I wish I’d brought RSM in five or six years ago...It took a catastrophic failure to understand that we needed to change the model, but now we’re certainly back on the right track.”

RICHARD PERLOTTO
Director, Shadowserver Foundation

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Character Lab

Hamstrung by limited technology

Character Lab advances scientific insights that help kids thrive. By connecting researchers with educators, the organization seeks to create greater knowledge about the conditions that lead to the social, emotional, academic and physical wellbeing of young people.

As Character Lab grew, its reliance on off-the-shelf accounting software created problems, including time-consuming and overly complex period closings as well as limited visibility into its finances.

[READ THE FULL CASE STUDY](#)



CHALLENGES

- > Dependent on Quickbooks' limited technology
- > Time-consuming monthly reconciliations
- > Hectic grant-reporting dates and year-end closes
- > Lack of visibility made yearly audit long and arduous

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SOLUTION AND RESULTS

- > Comprehensive finance and accounting outsourcing solution
- > Solutions for monthly close, financials, payroll and bill pay
- > Multidimensional ERP solution with Sage Intacct ERP platform
- > Blackline financial close platform
- > Custom reporting to match previously manual reports
- > Integrated vendor management and payroll providers
- > Deep industry experience and ability to provide audit-ready financials and timely monthly closes
- > Greater functionality and deeper insight with significant time savings.



“[One] area we’ve seen significant value in from RSM is the efficiencies across the technology platforms and making sure they talk to each other so we don’t need to enter data twice. We input data once, and then it feeds across everything.”

JIM SCHRODER, Director of Finance and Operations, Character Lab

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National Society of Professional Engineers (NSPE)

Making the most of limited resources

The NSPE is dedicated to the education, licensure, advocacy, certification, leadership training and support of its membership. And like most nonprofit organizations, it strives to build capacity and expand internal effectiveness, strategic planning and overall organizational impact even as resources remain tight.

[READ THE FULL CASE STUDY](#)

CHALLENGES

- > Limited resources and capacity
- > Lack of experienced accounting professionals on staff
- > Increasingly complex finance and accounting needs

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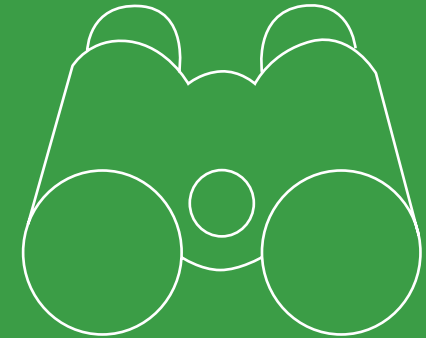
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SOLUTION AND RESULTS

- › Experienced people available to help
- › Efficient and effective processes put into place
- › Processing and payment of digital invoices in the cloud through Bill.com
- › Quick and easy access to financial data with Sage Intacct ERP system
- › Timely and meaningful financials that help leadership measure results and make decisions
- › Ability for approvers to authorize invoices and payments on the go
- › Streamlined financial oversight and strategic planning



“With RSM, I have trusted professionals in place, and it gives me the ability to expand my focus to other opportunities for our business.”

WENDEL STEWART
Chief Operating Officer,
National Society of
Professional Engineers

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Outsource your needs

By making use of RSM's outsourcing services, nonprofits have access to an enhanced suite of services that leverage leading technical accounting, tax and technology consulting services to meet the unique needs of the nonprofit sector.

To learn more about the ways in which RSM's outsourcing solutions can provide your nonprofit organization with experienced and accurate finance, accounting and technology services, visit RSM's managed services and outsourcing hub.

VISIT OUR HUB



+1800 274 3978
rsmus.com

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