Workday Adaptive Planning for Nonprofits

Nonprofits require strict fiscal management. Their budgets must be accurate to ensure they operate within their means, and their work must be transparent to demonstrate they are good stewards of the endowments and donors’ funds.

Nonprofits are complex—they handle multiple funds (restricted and unrestricted), programs, and locations, and must be able to plan for different grant sizes and distributions depending on projected donations. In order to stay on track to achieve their mission, organizations must change their planning processes.

Workday Adaptive Planning is a budgeting, planning, and reporting application that includes multidimensional, driver-based modeling capabilities along with fully integrated insight into scenario planning and grant planning, as well as cash flow projections. This intuitive, powerful solution enables nonprofits of all sizes to collaborate with ease, gain clear visibility into real-time analytics, and streamline complex internal and external reporting so they can plan and adapt without compromise.

Key Benefits

- Accurately plan revenues and expenses across a complex organization with many dimensions
- Integrate P&L and cash flow planning to ensure accurate cash projections
- Plan for and consolidate complex organizations, including multiple funds and programs
- Perform detailed staff planning and report on fully loaded costs by employee
- Allocate head count and overhead to funds, programs, locations, and more
- Model integrated P&L, balance sheet, and cash flow statements
- Empower budget owners to “own” the planning process

Plan and Model Across Multiple Scenarios, Variables, and Dimensions

With Workday Adaptive Planning, organizations are well equipped to plan across a number of dimensions, producing detailed models based on multiple scenarios so you can execute on outcomes. Users have the ability to model cash flow, program and grant planning, and costs by programs to reflect the complexities of the organization. You can model the hiring needs in your workforce, optimally plan your revenue strategy, and build long-term plans across the organization using a single source of truth.
Supercharge Planning with Elastic Hypercube Technology

Built with patent-pending Elastic Hypercube Technology, Workday Adaptive Planning offers power, scalability, and performance without compromising ease of use. This technology not only calculates complex models, but also adds memory and compute power as necessary to evaluate model elements in parallel. Purpose-built domain intelligence makes it easier and faster for users to build and adapt functional models. And tight links with Microsoft Office enable quick creation of board reporting on the fly.

Gain Real-Time Visibility Within a Flexible, Intuitive Interface

With a configurable dashboard that can be adjusted and expanded to meet the needs of any organization, Workday Adaptive Planning puts you in control. Analyze key drivers across any aspect of the organization. Generate reports at whatever level of granularity you need. And quickly perform variance analysis at every step along the way so you can determine the difference between actual and planned behavior. All of this is available in a web-based interface that allows users to operate in a familiar tabular environment, facilitating input from all types of employees regardless of training.

Integrate with Core Systems and Processes

Nonprofit organizations can no longer afford to keep critical functions in silos. Workday Adaptive Planning integrates with other core systems and external data sources to enable comprehensive planning, analysis, and reporting within even the most restrictive regulatory frameworks. And with a cloud-based solution at your fingertips, there’s no need for new hardware or software as you plan for the road ahead.

Minimize Human Error

Spreadsheet-based systems are inefficient, error-prone, and fundamentally unsuited for the level of active planning and reporting required by today’s nonprofit organizations. Workday Adaptive Planning helps you keep manual intervention to a minimum by relying on automated technology to plan continuously and leverage data from all corners of the business. As a result, you can rescue your budgeting, planning, and forecasting from slow, painful processes—ensuring compliance, increasing visibility, and improving your productivity by more than 70 percent.

Improve Outcomes While Streamlining Processes

For today’s organizations, it’s more important than ever to improve processes, effectively manage costs, and streamline revenue planning. This requires a single solution that fosters collaboration in planning across the organization. Workday Adaptive Planning makes it possible to model, report, analyze, and plan across the entire organization to make smarter decisions, gain business agility, and enhance programs and processes where it matters most. The result is a leaner, more responsive organization that’s well equipped to keep up with the pace of change.

To learn more about Workday Adaptive Planning for nonprofits, visit adaptiveplanning.com/solutions/nonprofit.

“With better accountability and transparency, we’re able to explore new opportunities. We are in a much better decision-making position to manage through the year and position ourselves for multi-year planning.”

VP Financial Planning
Leukemia & Lymphoma Society