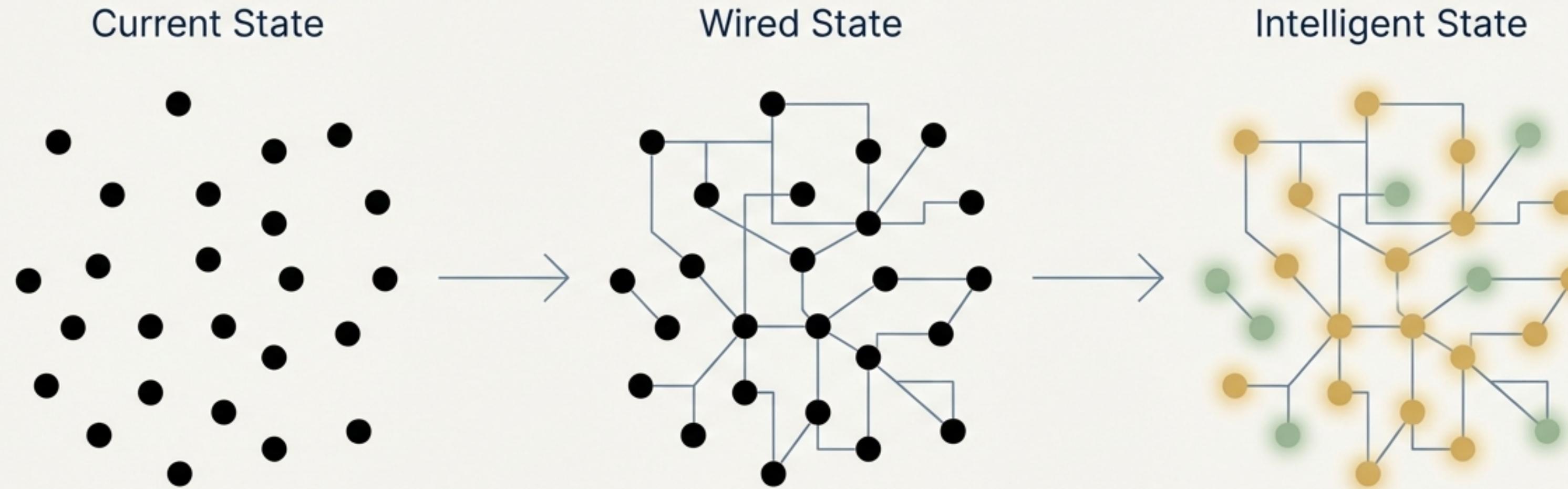


The Unified Nonprofit Operating System

Moving from disconnected silos to data-driven superpowers.



A brutally honest map of the current landscape.

THE DATA SILO MAP



THE DAMNING MATH

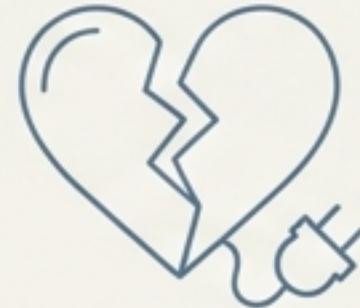
9 Systems = 36 possible bilateral connections.

Actual Connections = ~0-2.

Result = 33+ manual “puddles” where data is trapped.

The pipeline is really a series of disconnected puddles, each maintained by a different staff member, with data transferred via email attachments, CSV exports, and sticky notes.

Where the pipelines break down.



1. The Fundraising Black Box

THE REALITY: Online gifts hit Stripe but don't sync to CRM. Checks are manually entered.

THE FAILURE: No connection between gifts and program outcomes.

THE STAT: Nonprofit donor retention is 45% (vs. 80% in commercial subscription businesses) because organizations cannot demonstrate impact.



2. The Finance & Compliance Crisis

THE REALITY: Payroll runs in Gusto with no grant codes. QuickBooks classes are inconsistent.

THE FAILURE: Monthly close takes 15-25 days. Grant reporting is a forensic accounting exercise.

THE COST: \$8K-\$15K/year in extra CPA fees for 990 preparation.



3. The Program Data Void

THE REALITY: Paper intake forms and spreadsheets.

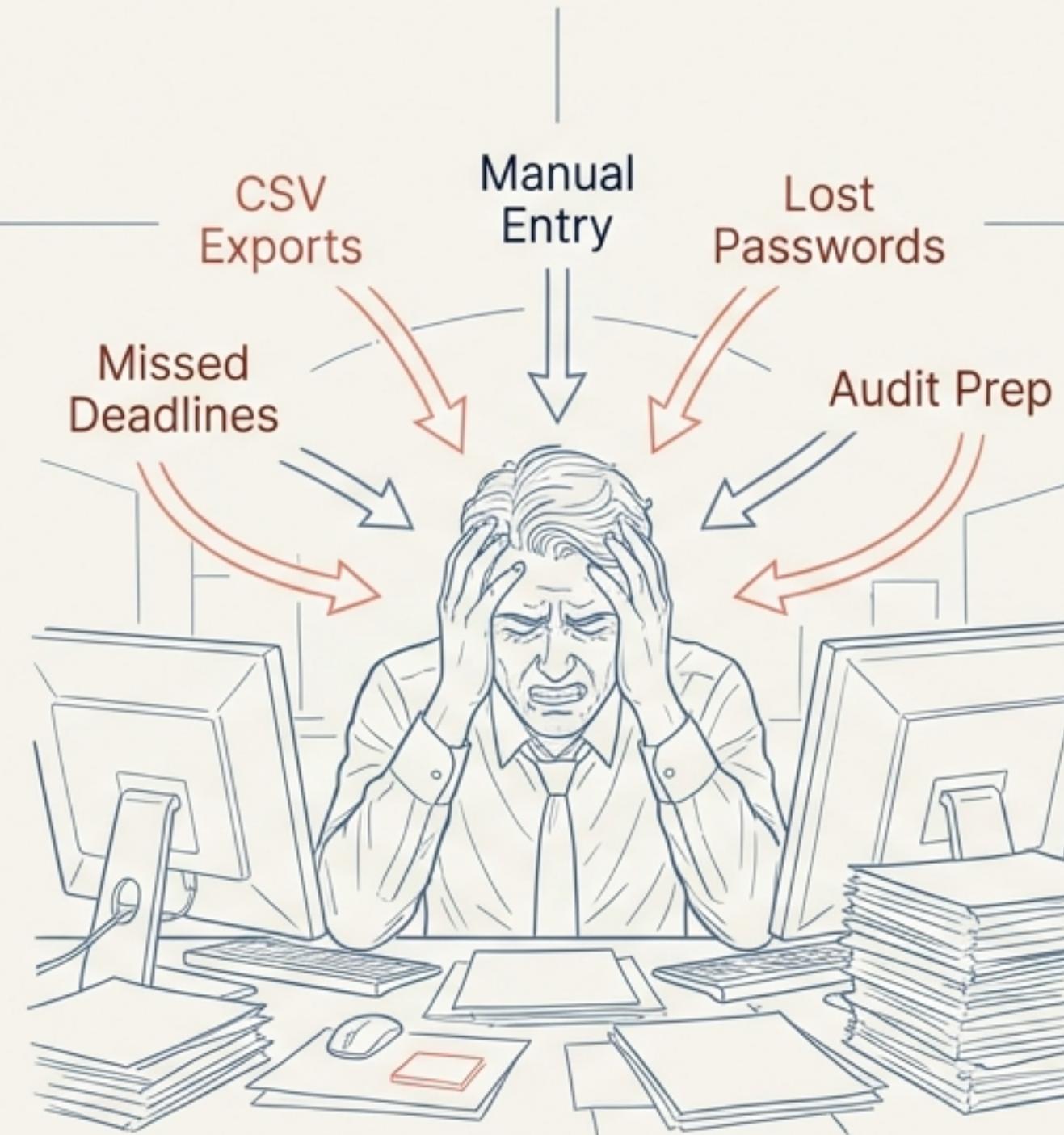
THE FAILURE: Outcomes are anecdotal. Case management data never reaches the development team.

THE RISK: Compliance liability (HIPAA/VAWA) managed by "locked file cabinets."

The human cost of the ‘Human Integration Layer’.

THE ROLES

- **The Executive Director:** Spends **60-70%** of time on admin tasks. Hired to lead, but works as a human router.
- **The Program Staff:** Spend **25-40%** of time on data entry.
- **The Grant Writer:** Spends 30-60 staff days/year solely on reporting.

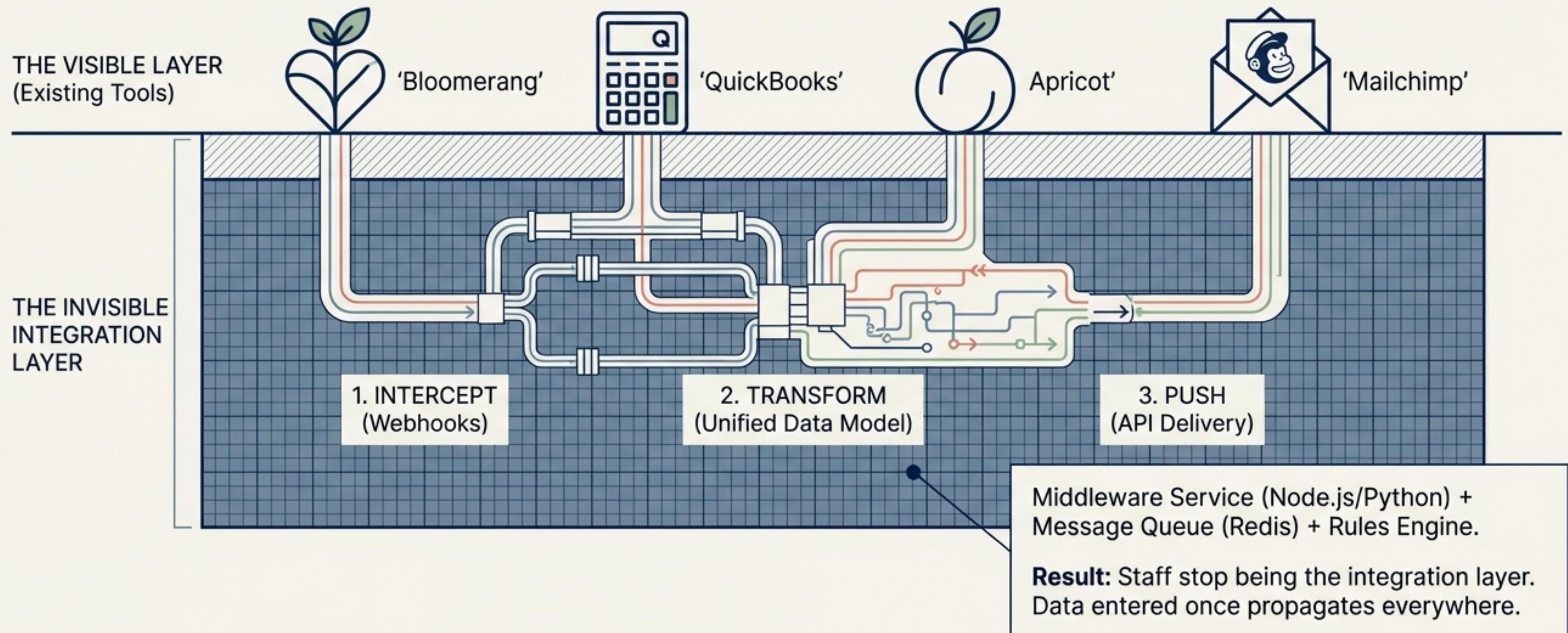


THE UNMEASURABLE COSTS

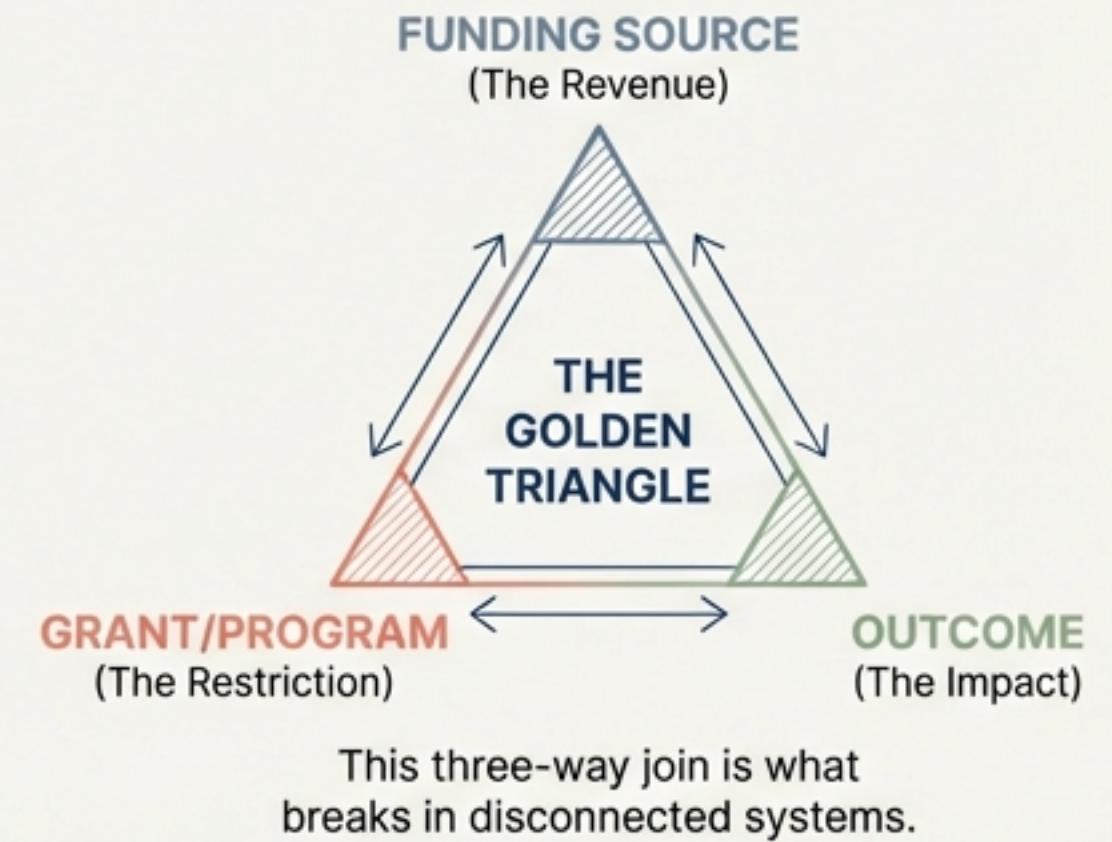
- **Missed grant deadlines.**
- **Lapsed major donors** due to lack of follow-up.
- **Strategic decisions** made on **60-day old** financial data.
- **Staff Turnover:** 25-35% annually in direct service roles.

The V2 Vision: Building the Connective Tissue.

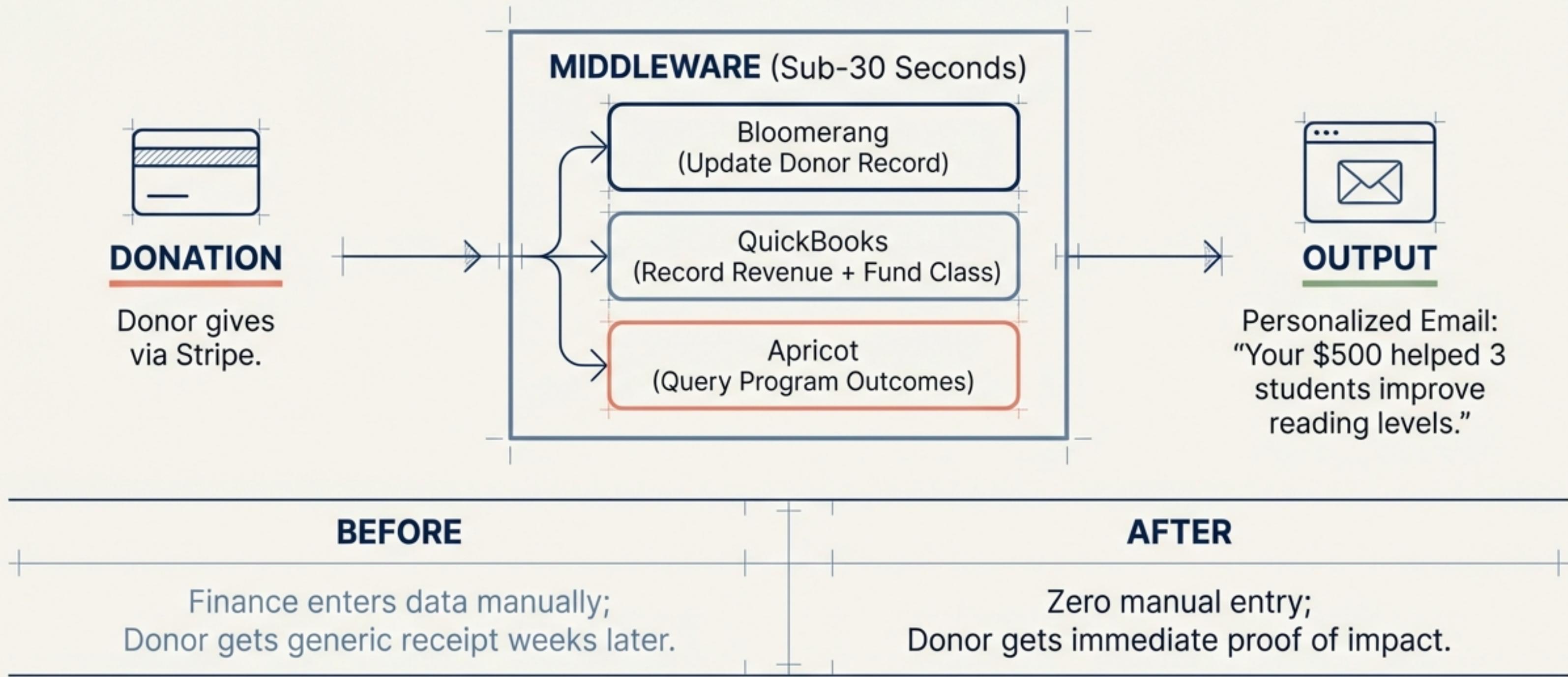
We are NOT replacing your tools. We are building the middleware that makes them talk.



The Unified Data Model.



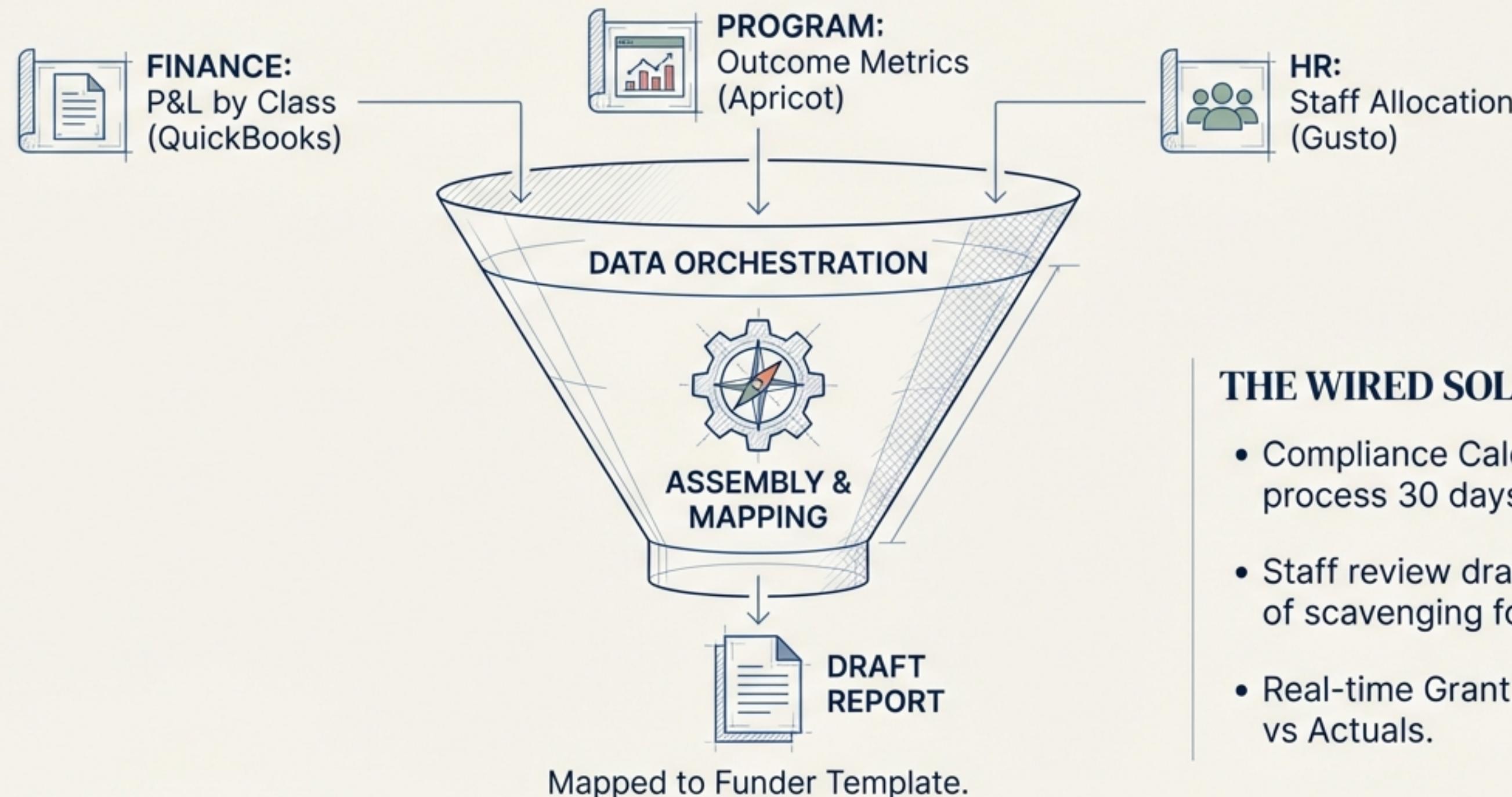
Fixing the Fundraising Pipeline: The Closed Feedback Loop.



ROI: Improving retention from 45% to 55% is worth more than any new acquisition campaign.

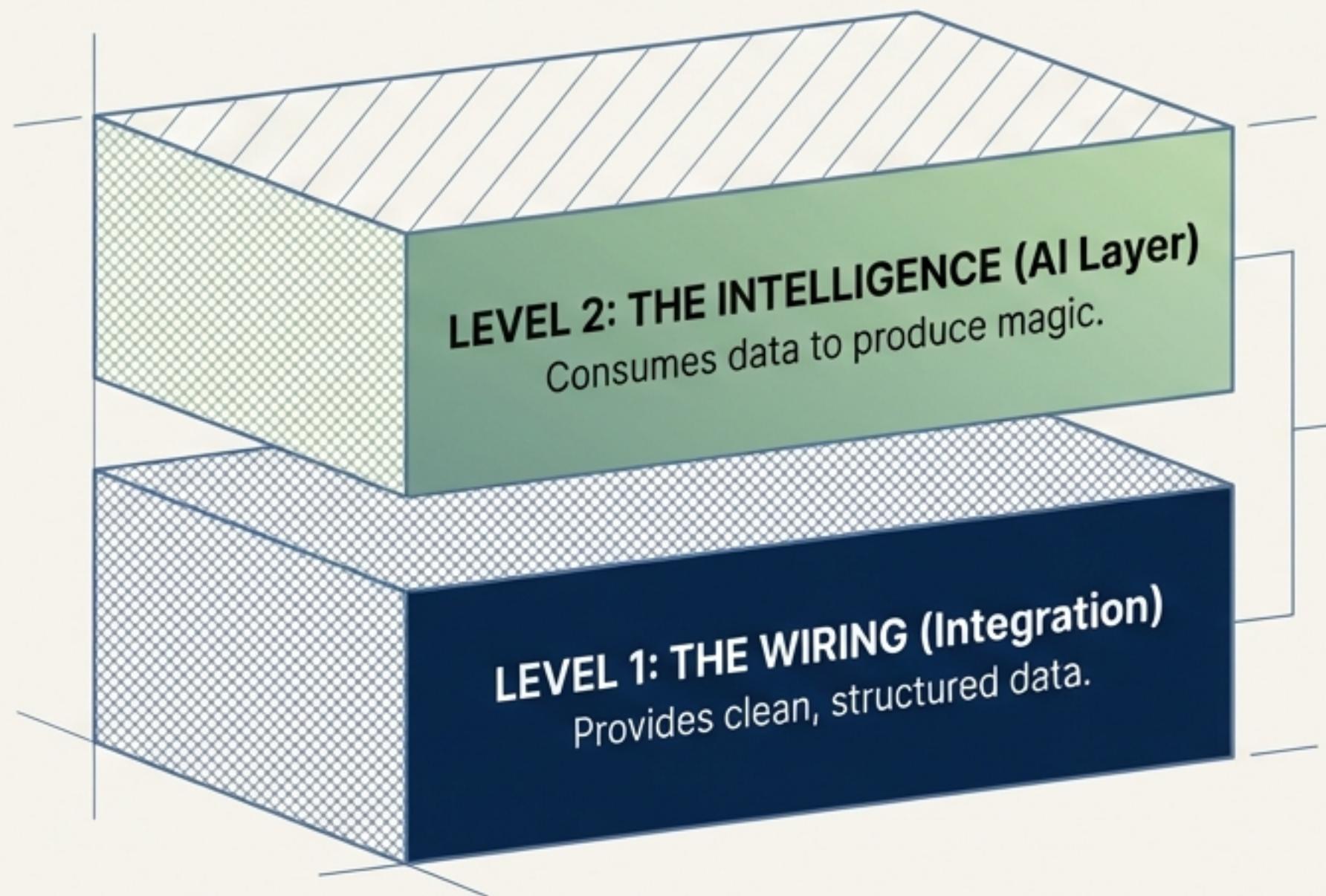
Automating the ‘Single Most Painful Process’.

From 3 weeks to 3 hours: The Grant Reporting Pipeline



The Sugar on Top: AI, ML, and Magic.

**“AI without clean, connected data
is just a hallucination engine.”**

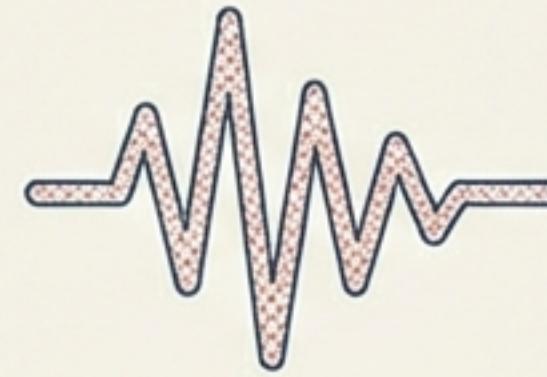


THREE CATEGORIES OF MAGIC

- 1. INSIGHTS:** Risk flags, predictions (e.g., donor lapse).
- 2. AUTOMATIONS:** Routing, form population (e.g., intake).
- 3. CONTENT:** Reports, grant drafts (e.g., narratives).

AI for Client Services: Dignity and Efficiency.

MULTILINGUAL VOICE INTAKE



Tech: Whisper (Speech-to-Text) + Translation API.

The Change: Replaces 45-minute paper forms with a conversation.

Equity: Clients served in their language from the first interaction.

BENEFITS ELIGIBILITY SCREENER *(High Impact)*

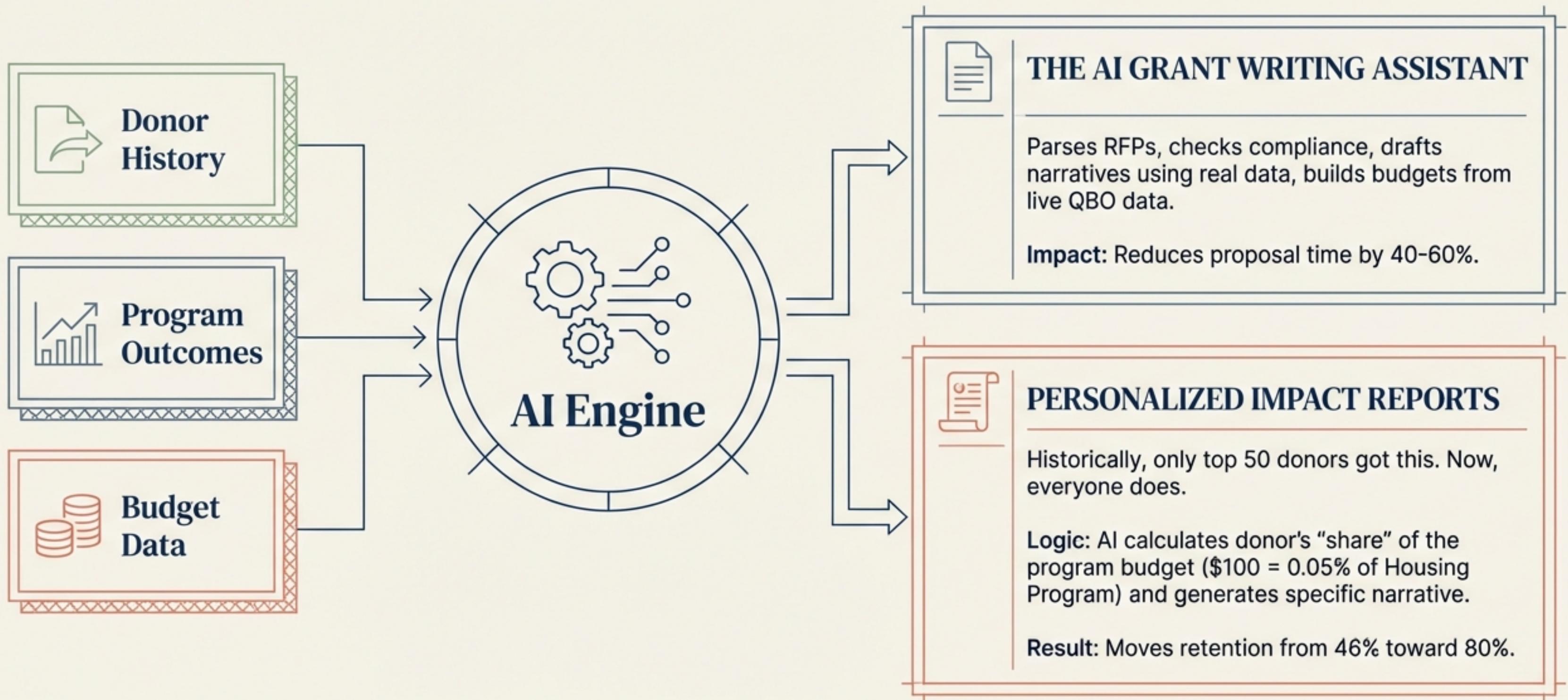


The Problem: Case workers spend 2-4 hours manually checking 50+ benefit programs.

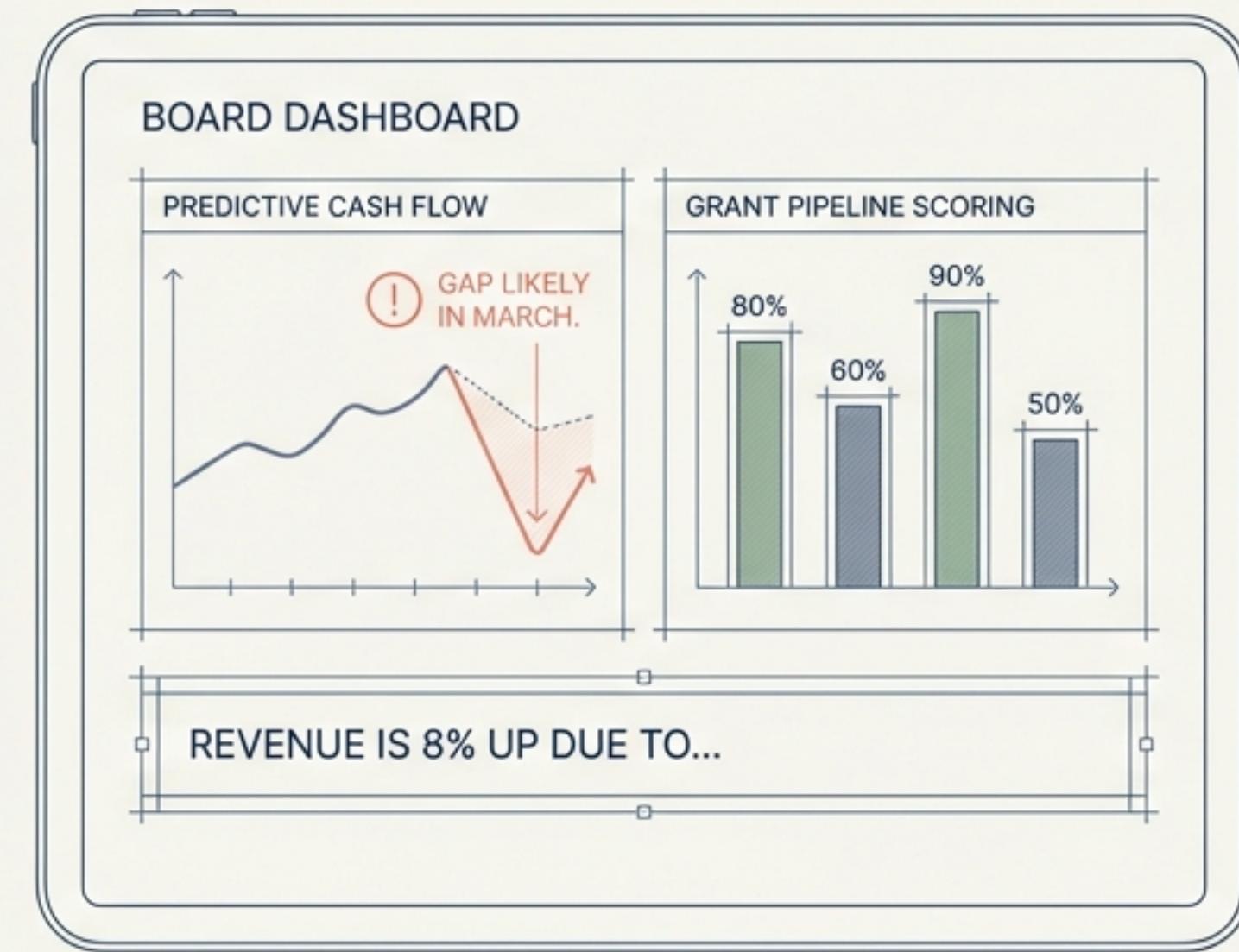
The Solution: LLM extracts client data → Deterministic Rules Engine checks eligibility.

The Result: Screening takes 15 minutes. Finds \$3,000-\$5,000/year in unclaimed benefits per family.

AI for Fundraising: Scaling the Personal Touch



The Intelligent Board & Financial Forecasting.



SMART BOARD PACKETS

Auto-generated executive summaries and financial commentaries. Replaces 15-hour manual assembly with 3-hour review.

INTELLIGENT FORECASTING

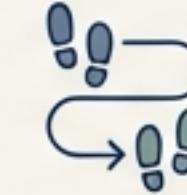
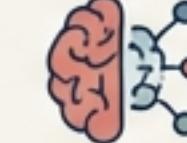
Predictive models flag shortfalls months in advance. Board members see professional, real-time projections instead of stale PDFs.

The ROI: From Day One to Transformation

DAY ONE WINS (Immediate)

-  Connected CRM/Accounting
(No double entry)
-  Automated Tax Receipts
(IRS compliant)
-  Grant Tracking Dashboard

LONG TERM VALUE (Strategic)

-  Intelligent Forecasting
-  Personalized Donor Journey
-  Data-Driven Strategy

THE MEASURABLE SAVINGS

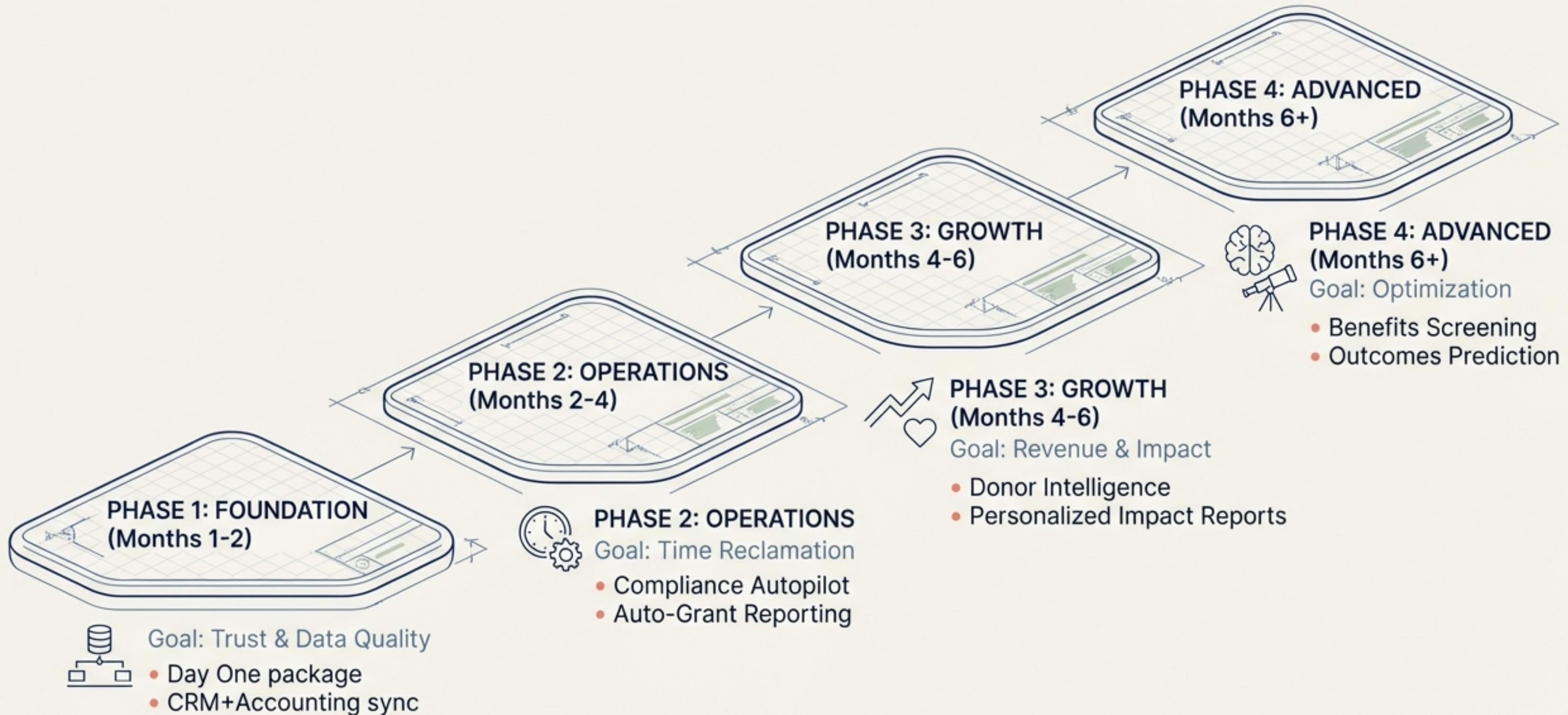
 TIME:
500-1,000
staff hours
saved/year

 AUDIT:
\$15k-\$40k
savings in
prep costs

 RETENTION:
20-30%
reduction in
donor attrition

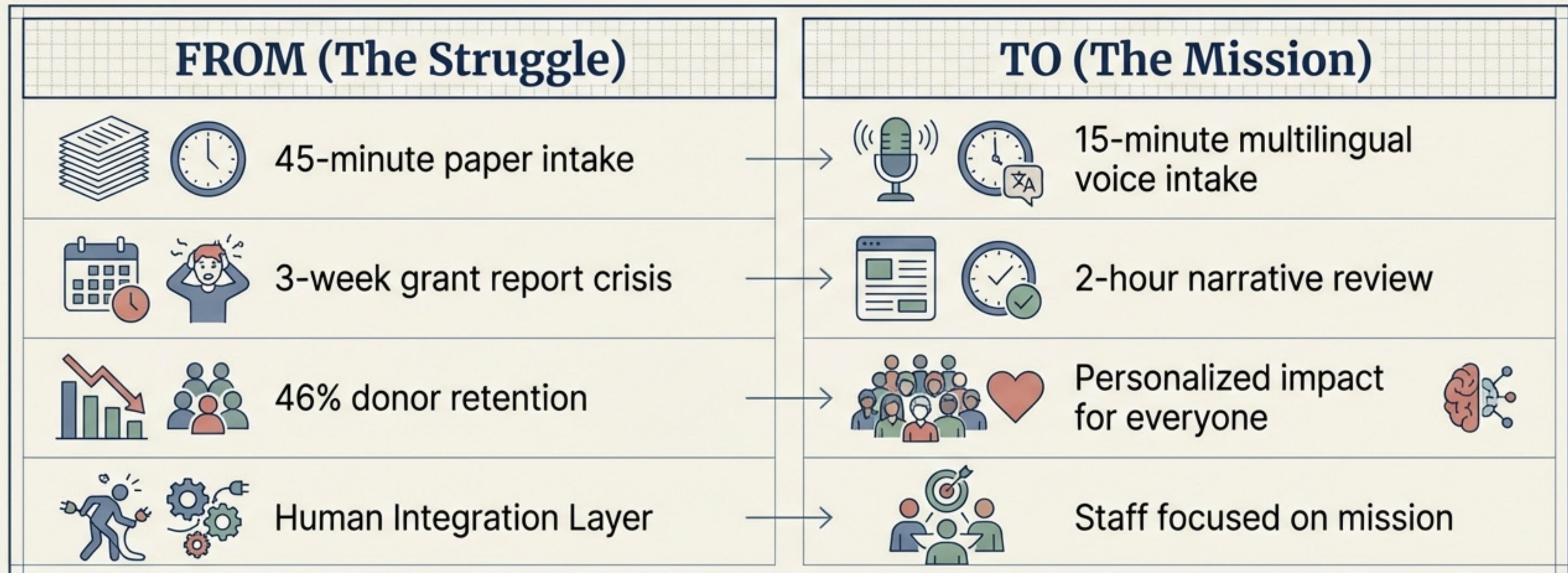
 IMPACT:
20-30%
reduction in
client no-shows

The Roadmap: Phased Implementation



Mission Acceleration.

The tragedy is not that better tools don't exist. It is that the sector has accepted the current state as normal.



The data already exists. It's time to wire it up.