ORGANIZATIONAL ROADMAP

An agency-wide assessment of where you are and detailed plans to move forward

Running a nonprofit is no easy task, and continuing to move all aspects of your organization forward can be challenging. Wouldn't it be great to have a roadmap that shows you the key areas of your organization and identifies where you should spend your time and effort? Work with us to get your custom organizational roadmap to guide your way. You will gain new insights on what is possible, identify improvement opportunities, and see the steps you need to take to get where you want to be.

wipfli.com/roadmap
888.876.4992

WIPFLi LLP
CPAs and Consultants

Your custom Organizational Roadmap will include the following assessments:

Strategic Plan
We will compare your available plan documents with a set of national standards and best practices to provide you with recommendations for improvement.

Technology
We will identify opportunities within your organization to optimize the use of technology for enhanced productivity and reduce your total cost of ownership. We will document your organization's current state and prioritize our recommendations to help you transition to following industry best practices.

Retirement Plan
We will conduct a comprehensive analysis of your current retirement plan to help you reduce risk, comply with regulatory requirements, and deliver more value to your employees.

Financial Policies and Procedures
We will highlight changes needed to comply with 2 CFR Part 200, Uniform Guidance, if necessary, and highlight opportunities for efficiencies as they come to our attention.

Donor System
We will provide you with recommendations to improve or create your donor program with step-by-step plans to support your strategic goals.

Salary Structure
We will review your compensation philosophy and the salary structure in place at your organization to provide recommendations and best practices on compensation administration, avoiding salary compression, and staying compliant.

MIP Database and Security
If you own MIP, get even more! We will review the fund accounting capabilities of your MIP software and your chart of accounts, including using efficiency features in MIP and organization preferences setup. We will review the security rights of each user based on their roles.

Are you ready to get your organization where you want to be? Our highly skilled team of professionals is ready to get you there.

Contact us or visit **wipfli.com/roadmap** for more information or to get started.

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