

How Nonprofits Endure: *Balancing Strategy, Data and Operations*

SESSION 3: THE SYSTEMS AND TEAMS
BEHIND SUSTAINABLE GROWTH

SEPTEMBER 23, 2026





WHAT TO EXPECT TODAY

The Systems and Teams Behind Sustainable Growth

1. What it takes to translate fundraising direction into coordinated execution
2. How to evaluate capacity and address constraints before adding resources
3. How systems and repeatable processes reduce friction and support growth
4. How to align roles, resources, and accountability across the organization

WELCOME

Today's Presenters



Kate Hultin -Schott

Senior Director

Nonprofit Advisory Services



Elizabeth Orpina

Manager

Nonprofit Advisory Services

WHO WE ARE



Firm Overview



Employees
2700+

Team Members in
41 States

Firm Ranking
20th Largest

Canada
Vancouver

India
Ahmedabad
Hyderabad

California
San Ramon
Century City
El Segundo
Irvine
Los Angeles
San Francisco
San Jose
Woodland Hills

Florida
Boca Raton

Georgia
Atlanta
Brunswick
Duluth

Idaho
Boise

Colorado
Denver

Illinois
Chicago

Missouri
St. Louis
St. Charles

New York
New York City
Garden City
White Plains

Pennsylvania
Philadelphia
Scranton

Tennessee
Nashville

Texas
Austin
Dallas

Utah
Salt Lake City

Washington
Bellevue



Welcome back!

Sessions 1 & 2 Recap

- Revenue alone does not indicate fundraising health; retention, donor mix, concentration, and pipeline reveal whether growth is sustainable.
- Reliable decisions begin with trusted data, shared definitions, and a baseline that explains what changed and why.
- Donor intelligence connects organizational priorities with donor interest, engagement, affinity, and capacity.
- Fundraising plans must sequence relationship-building and set targets based on realistic opportunity and organizational capacity.
- **A shared roadmap aligns priorities, sequence, capacity, and revenue, but execution requires clear systems, processes, and ownership.**



BUILD CAPACITY

From Direction to Execution



PARTICIPANT POLLING QUESTION

Once a fundraising plan is established, where does execution *most often* break down?

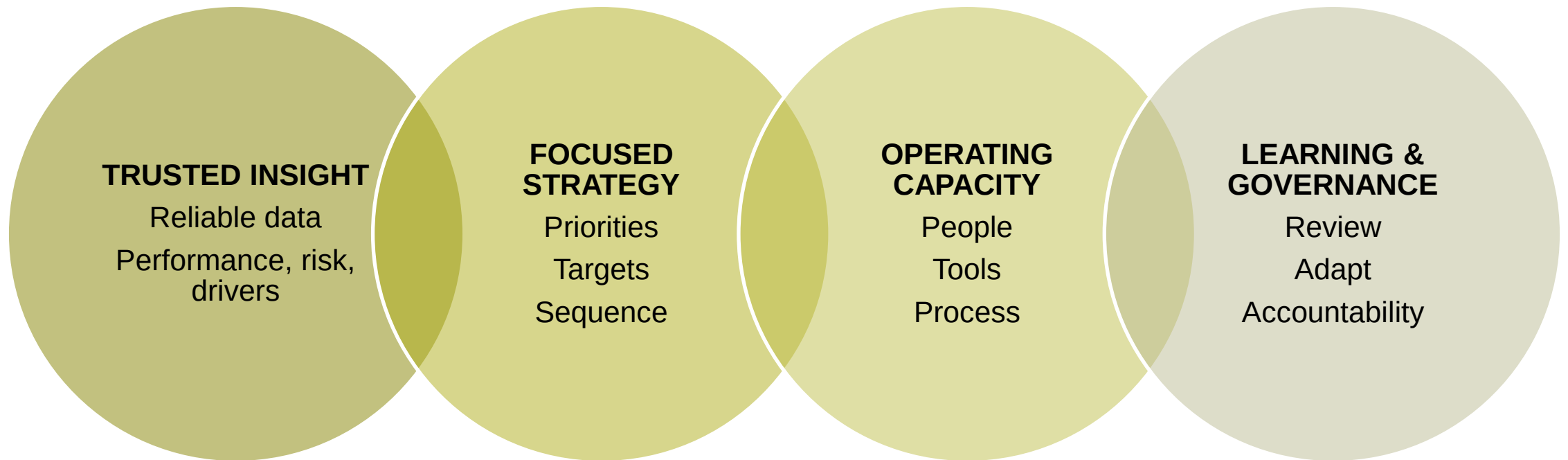
- A. Ownership and accountability are unclear
- B. Workload exceeds available capacity
- C. Systems and tools create friction
- D. Processes and handoffs are inconsistent
- E. Cross-functional coordination is limited



Roadmaps are Realized Through Operations



Sustainable results require more than strategy alone





Identify the Signals



A missed target is often the outcome of an earlier operating breakdown.

	REVENUE & PACE	• Are we on target, and what changed?
	CAPACITY & COVERAGE	• Is work matched to owners?
	RETENTION & PIPELINE	• Are relationships deepening?
	EFFICIENCY & QUALITY	• Are systems reducing or creating friction?
	CONCENTRATION & RESILIENCE	• Where are we exposed?



Diagnose Before Responding



Do not add people, technology, or activity until the underlying constraint is clear.

SIGNAL

- Retention falls
- Pipeline stalls
- Forecast misses
- Acknowledgments slow

ROOT-CAUSE TEST

- Donor experience
- Portfolio coverage
- Data definition
- System friction
- Unrealistic sequence

OPERATING DECISION

- Validate the signal
- Assign an owner
- Choose the response
- Set the review point



BUILD CAPACITY

Assess Capacity and Choose the Response



Capacity Lenses



Capacity exists when the work, resources, and ownership are aligned.

WORK	What must actually happen?
VOLUME	How much and how often?
SKILLS	What expertise is required?
COVERAGE	Who owns and backs up each step?
SYSTEMS	What can be simplified or automated?



PARTICIPANT POLLING QUESTION

Which capacity constraint creates the most downstream friction today?

- A. **Work:** the required steps are not clear
- B. **Volume:** demand exceeds available time
- C. **Skills:** specialized expertise is missing
- D. **Coverage:** ownership or backup is unclear
- E. **Systems:** tools or workflows create friction



Surface Capacity Conflicts



The “right” response depends on the constraint(s), not just the volume of work.

Resolve Conflict First

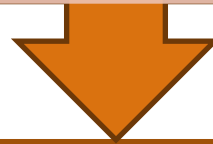
Donor portfolios without clear owners

Events without follow-up capacity

Grant volume that exceeds reporting capacity

New technology without administration

Campaign timelines that outpace readiness



Then consider possible response

Reallocate work

Simplify priorities or processes

Strengthen training

Improve technology

Use outside/outsourced support

Hire additional staff



Add Without Losing Accountability

BUILD

Hire • train • cross-train

Best for core, continuous ownership
and institution-specific judgment.

BUY

Technology • managed service

Best for standardized volume,
automation and specialized
execution.

BORROW

Fractional • shared • episodic

Best for transitions, projects,
specialist advice and surge capacity.

DUE DILIGENCE BEFORE YOU ADD CAPACITY

Outcome & scope

Data ownership

Authority

Service level

Access & security

Handoff / exit plan



BUILD CAPACITY

Build the Operating Infrastructure



Foundations of Effective Technology

CRM

FINANCE

MARKETING

PAYMENTS

GRANTS / PROGRAMS

ANALYTICS

1

ONE SYSTEM OF RECORD

Define where each critical field is governed.

2

SHARED IDS & DEFINITIONS

Use common donor, gift, campaign and status logic.

3

INTENTIONAL INTEGRATIONS

Automate only stable, clearly owned handoffs.

4

ROLE-BASED ACCESS

Match permissions to responsibility and risk.

5

EXCEPTION ALERTS

Surface failures, stale activity and broken flows.

6

NAMED OWNER & CHANGE CONTROL

Assign administration, testing and communication.



Build Infrastructure to Match Complexity

	<i>Low Maturity</i>		<i>High Maturity</i>
PROCESS	REACTIVE	MANAGED	SCALABLE
DONOR DATA	Core fields vary; manual cleanup	Definitions owned; routine quality checks	Integrated records; automated exceptions
PORTFOLIO MANAGEMENT	Activity depends on individuals	Stages, next steps and coverage are visible	Workload balanced; predictive views support action
GIFT PROCESSING	Manual handoffs; timing varies	Documented coding, acknowledgment and reconciliation	Workflow automation; exceptions routed and reviewed
REPORTING & FORECASTING	Top-line or on request	Recurring dashboard and shared assumptions	Scenario modeling; driver-based forecasts
GOVERNANCE & CONTINUITY	Knowledge sits with people	Owners, backups and review cadence defined	Change control, cross-training and resilience tested



Consistency Creates Capacity

A REPEATABLE PROCESS HAS DEFINED...

1 TRIGGER

What starts the work?

2 OWNER

Who is accountable?

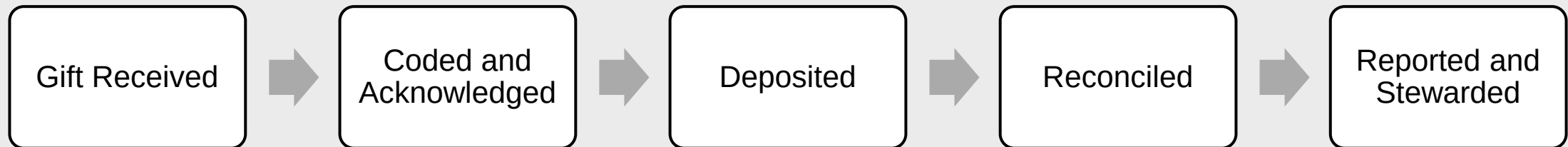
3 STANDARD

What does “done” mean?

4 EVIDENCE

How do we verify and learn?

EXAMPLE: ONE GIFT CROSSES MULTIPLE FUNCTIONS





BUILD CAPACITY

Align Ownership & Accountability



PARTICIPANT POLLING QUESTION

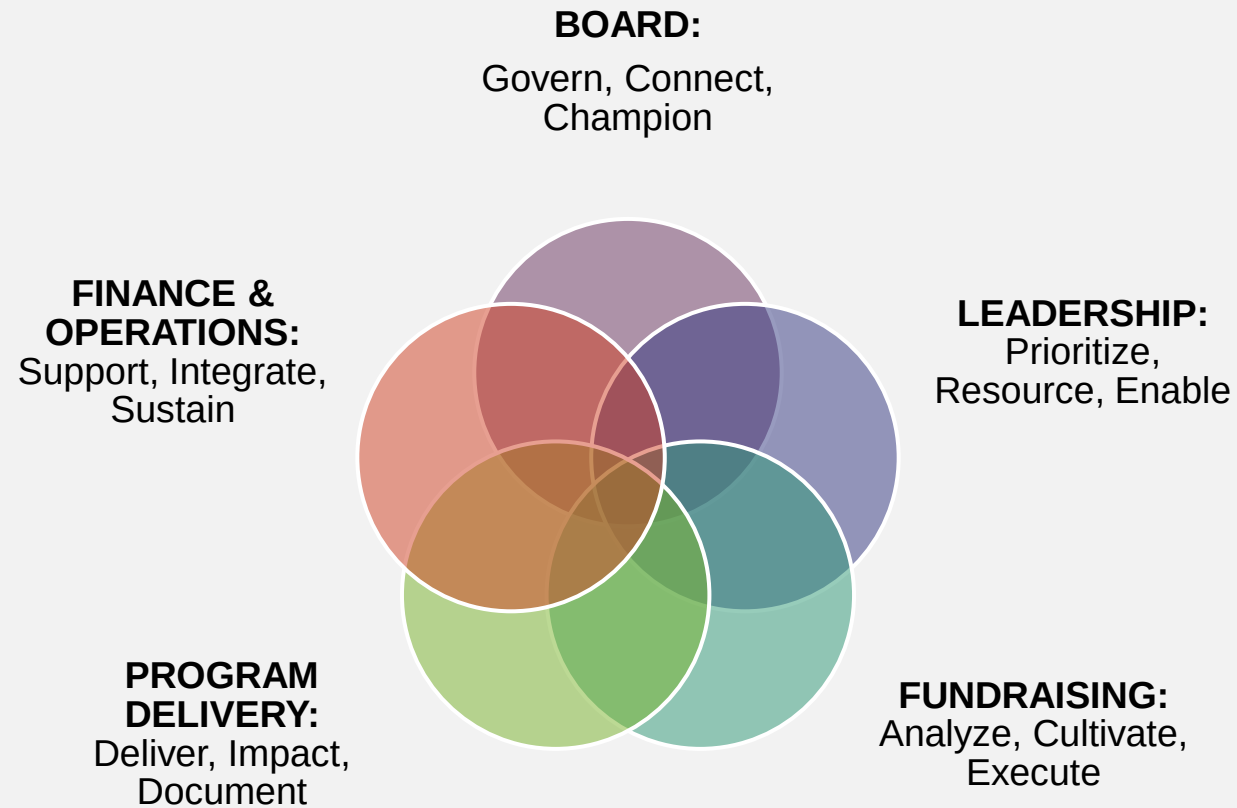
Which non-development group should be more consistently engaged in fundraising execution?

- A. Board and executive leadership
- B. Programs
- C. Finance
- D. Operations and IT
- E. Marketing, HR, and volunteers



ALIGN OWNERSHIP & ACCOUNTABILITY

Fundraising Is a Team Effort





Turning Strategy Into Action



Weekly

- Work queues
- Next moves
- Blockers

Monthly

- KPIs & forecast
- Portfolio coverage
- Reconciliation & exceptions

Quarterly

- Strategy and resource shifts
- System/process health
- Risk review

Annually

- Baseline and channel mix
- Staffing model
- Roadmap reset



Readiness Quiz

Rate each statement:

A. Not in place (1 point)

B. Emerging or informal (2 points)

C. Mostly consistent (3 points)

D. Fully embedded (4 points)

- | | | | |
|---|---|----|--|
| 1 | Can leaders explain the drivers behind fundraising performance? | 6 | Are system roles, access and administration defined? |
| 2 | Does every critical metric have a named owner? | 7 | Are key handoffs and exceptions documented? |
| 3 | Are development and finance figures regularly reconciled? | 8 | Do non-development roles know their contribution? |
| 4 | Is each priority broken into sequenced next steps? | 9 | Is there an active monthly / quarterly review cadence? |
| 5 | Are workloads, portfolios and coverage visible? | 10 | Can the organization pause or change course based on evidence? |



What Your Score Suggests

10–17 | FOUNDATIONAL

- Essential execution practices are limited or inconsistent.
- **Start with:**
 - ✓ clear ownership
 - ✓ Shared definitions
 - ✓ Critical handoffs

18–25 | DEVELOPING

- Important elements exist but remain informal or dependent on individuals.
- **Focus on:**
 - ✓ Documented processes
 - ✓ Visible workloads
 - ✓ Consistent review practices

26–33 | MANAGED

- Core practices are largely consistent, with opportunities to strengthen coordination.
- **Strengthen:**
 - ✓ Cross-functional integration
 - ✓ Backup coverage
 - ✓ Exception management

34–40 | SCALABLE

- The organization has a strong foundation for coordinated execution and growth.
- **Advance:**
 - ✓ Automation
 - ✓ Scenario planning
 - ✓ Continuous improvement



PARTICIPANT POLLING QUESTION

Where does your organization most need stronger cross-functional guidance to sustain growth? (select up to 2)

- A. Financial resilience and audit readiness
- B. Tax, regulatory, and compliance considerations
- C. Technology, data, and cybersecurity
- D. Revenue diversification and fundraising sustainability
- E. Workforce and operating capacity
- F. Governance and risk oversight



BUILD CAPACITY

Closing Discussion



CLOSING

Supporting the Mission, Together

1

UNDERSTAND

Performance, risk and drivers

2

FOCUS & SEQUENCE

Realistic plans aligned to capacity

3

ALIGN

Systems, staffing and processes

4

GOVERN & ADAPT

Learn, improve and scale over time



QUESTIONS & DISCUSSION

Creating More Capacity for Your Mission



PERFORMANCE

Which signal needs a better explanation?



CAPACITY

Which initiative is ahead of readiness?



PROCESS

Which handoff creates the most friction?



ROLES

Which non-development role should be activated next?

Thank you



OCTOBER 28, 2026 | 12:00 P.M. PT / 2:00 P.M. CT

Build Resilience: Structures That Help Organizations Go the Distance

What to Expect:

- What financial sustainability means beyond “balanced budgets”
- How fundraising, cash flow, reserves, and risk are connected
- What the “Great Wealth Transfer” could mean for future fundraising opportunities
- The growing role of planned giving in nonprofit sustainability



Thank you for attending

Additional questions?

Reach out to us at experts@armanino.com

Kate Hultin-Schott
Kate.Hultin@armanino.com
[Connect on LinkedIn >>](#)

Elizabeth Orpina
Elizabeth.Orpina@armanino.com
[Connect on LinkedIn >>](#)

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