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SOFTWARE

Missions on the Move

How the right technology can keep
global organizations connected

A whitepaper by Geni Whitehouse

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It is hard enough to communicate with team members across the room, but many of today's NGO's and multi-national non-profits must stay connected with people around the world. They often cross geographical, cultural, and political boundaries to reach those in need. They manage people who speak different languages, manage funds in multiple currencies, and manage applications on diverse technical platforms. As they spread their cause globally, these organizations encounter hurdles and difficulties of every sort in an environment of increasing government oversight and shrinking budgets.

As Richard Gere learned during a New Delhi awards show, a single cultural misstep can ruin your relationship with an entire country. Likewise, a single operational misstep can be the kiss of death for an organization striving to make a difference in a given country. No one wants to miss a delivery, deploy the wrong supplies, or send electrical equipment to a location with no electricity. It is the mission of these organizations to get the right aid to the right people in the fastest possible way. To do so, they must wade through a ton of details, manage paperwork, and disburse funds while keeping everyone informed. Fortunately, today's software can help global organizations maneuver around the roadblocks that are likely to appear on the way to global success.

Let's take a closer look at global organizations and their relationship with information—how they access, share, and use it. In each area, we'll examine the ways in which technology can help these organizations stay connected and avoid the kinds of operational faux pas that can prevent them from accomplishing their mission.

Accessing information

In order to use or share information, you must have access to the system that contains it. In many cases, field workers and aid recipients are in remote areas with limited or spotty internet connections and unreliable access to power. Unless you plan to drive around the globe in a mobile IT van, you will have to rely on local connectivity to keep the information flowing. And that isn't always easy. You can't rely on either a centralized network or stand alone software applications to meet your needs. In order to get information to and from workers in these conditions, you will need a number of different deployment options. You want a centralized, robust database that can send and receive information in a number of different ways.

You might encounter any of the following infrastructure scenarios at a field or regional office:

1. Reliable Internet access, acceptable bandwidth, and a reliable power supply
2. Reliable Internet access, acceptable bandwidth, and an unreliable power supply
3. Limited Internet access, insufficient bandwidth, reliable or intermittent power supply

Rather than delivering a one-size fits all solution, your provider should offer deployment options that best utilize the resources available at a given location. Ideally, you want a solution that can be deployed via the Internet and also offers Portals and Terminal Services, as well as replication capabilities.

What to look for in a global solution:

Deployment	Configuration	Hardware Required	Internet Access
Cloud-based (Software as a Service)	Application is resident on the cloud, all users access via the Internet	Standard desktops for user access	Required for use
Central system with portal or terminal services access	Application resides on a dedicated or shared server, users access via the Internet using portals or terminal services	Server or rented access to server farm, laptops or desktops for user	Required for use
Stand-alone and networked stations with replication capabilities	Application resides on a central network and also on machines at each location, data is periodically replicated between central system and remote locations	Server for central information, robust desktop machines that can run the application in each local office	Only required for limited periods

Cultural faux pas: Turning down a glass of vodka when offered one by your host in Russia. www.cio.com

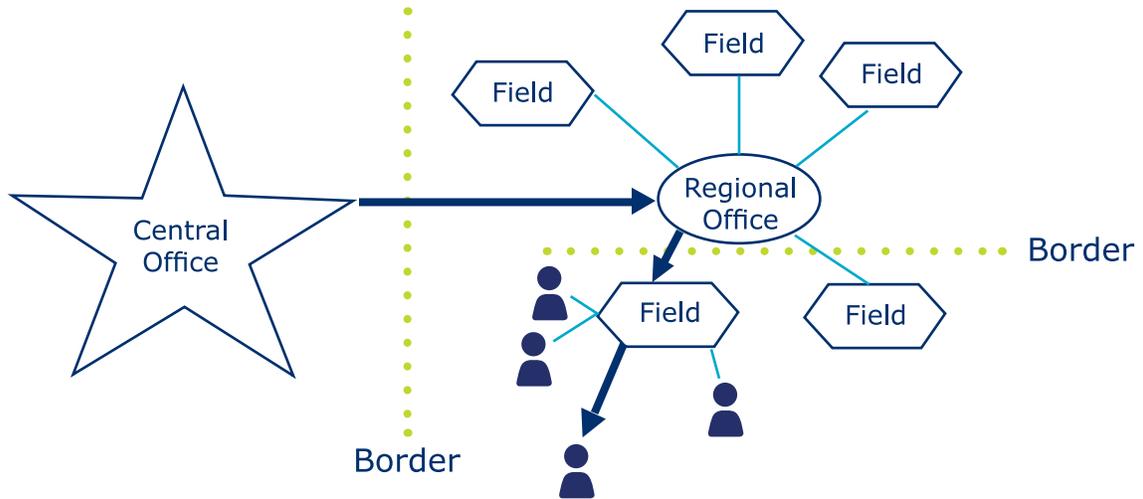
Operational faux pas: Expecting all remote offices to maintain a live Internet connection in order to enter transactions.

Sharing information

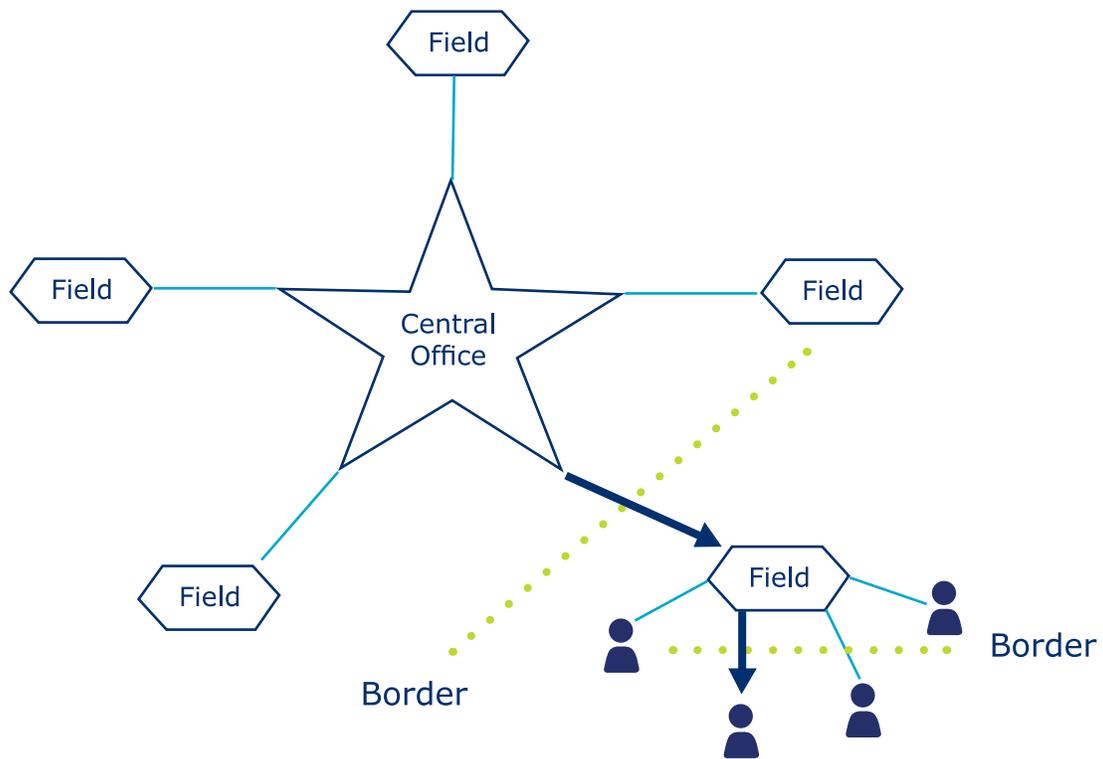
Once everyone has access to your system, the next challenge of a global organization is to get information from the person at point A to the person at point B in a usable form. Most projects are initiated at a central office. The central office handles administration, promotion, and fundraising in support of services that are delivered by teams of volunteers and staffers in the field. Some organizations have regional- or country-based teams that support the local field offices, while others provide direct field office support.

Since grant administrators and the staffers who deliver services are rarely at the same location, it can be an arduous task to disseminate information among the entire team—especially when you are crossing countries and even continents. Every time the baton passes from one person to another, you are in danger of losing information or spreading misinformation, so you need a system that can translate across multiple currencies and multiple languages.

Funds flow from central office to regional office to field offices to individual recipients.



Funds flow from central office to field offices to individual recipients.



Currencies

In every global organization, there is constant downstream movement of funds from the grant manager at the central office to the field offices to the recipient. As the funds move across borders, they are likely to change currencies. A grant might be awarded in US dollars then sent out to regional country offices in Euros where it is used to purchase food with Kenyan Shillings. Your system should automatically convert funds from one currency to another at each step in the process. You need a system that can easily track, manage, and analyze funds in multiple currencies across each of the different entities.

Your system should also make it easy for you to update conversion rates and to comply with foreign currency reporting requirements, while handling VAT or sales taxes as needed. In short, you need a system that is built for international use and equipped to handle multiple currencies as well as the reporting and compliance challenges of a global organization.

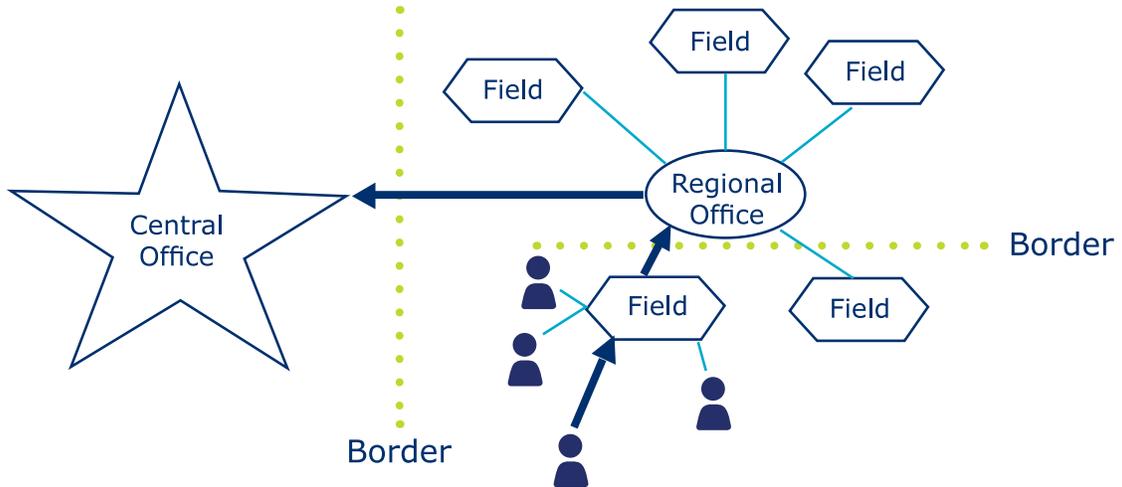
What to look for in a global solution:

Central Office	Regional Office	Field Office
Create grant proposal and budget in currency of each field office but manage in local currency, submit it in currency of the grantor	Consolidate information from each field office to create multi-level rollups and consolidate currencies	Submit funding requests in local currency
Designed for international use but adaptable to meet the needs of individual users in different locations	Application reflects the nuances of the location and country in which I operate as well as my unique processes	Application reflects the nuances of the location and country in which I operate as well as my unique processes.
Import currency rates automatically	Have correct rates for field offices and local area	Have correct rates for local market
Manage and report on transactions in central office currency	Report on transactions in regional office currency	Manage transactions in field office currency
Allocate indirect costs in correct currency	Share fully loaded budgets	Give users an accurate budget
Handle VAT and sales tax correctly in each location	Make it easy to report on sales and value added taxes	Make it easy for users to collect VAT or sales tax if needed

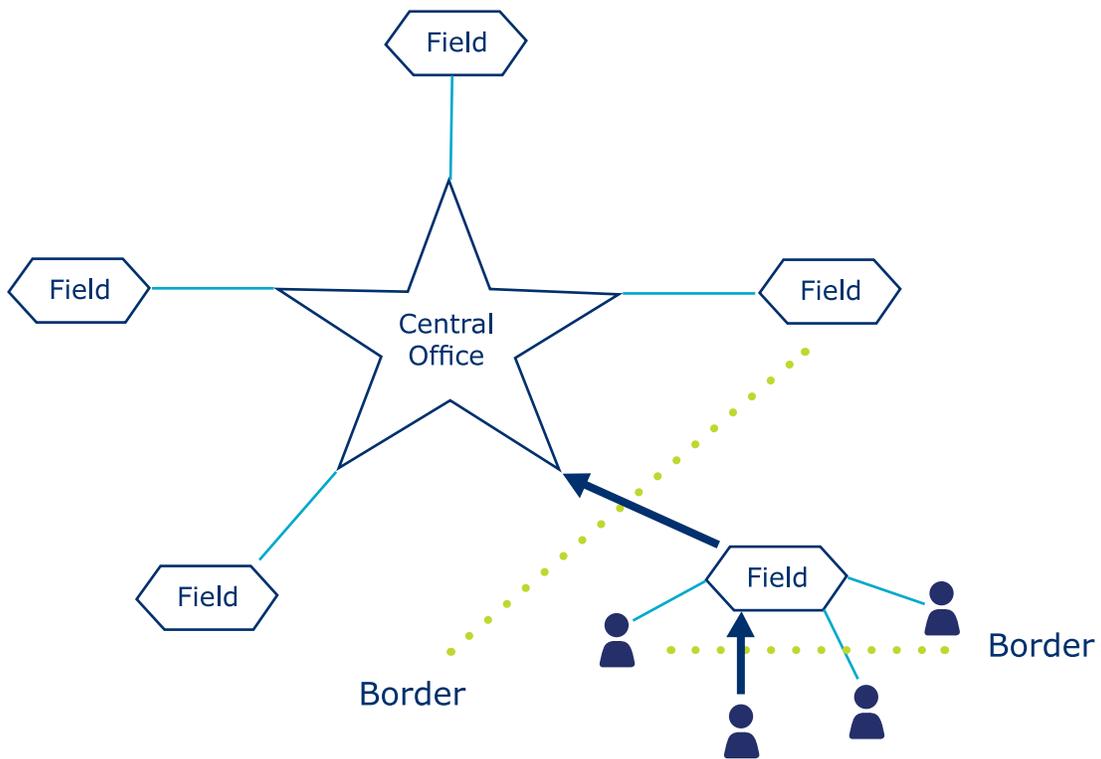
Cultural faux pas: Looking your host straight in the eye in China. www.worldbusinessculture.com

Operational faux pas: Requiring field workers to manually convert currencies back to the grantor's currency.

Information flows from recipients to field offices to regional offices to central office for centralized reporting.



Information flows from recipients to field offices to central office for centralized reporting.



Languages

At the same time funds are flowing downstream, information has to flow upstream. Details about services provided, funds expended, and constituents served must find their way from the field offices up to the central office on a timely basis. Every person involved in the flow of information—from recipient to grantor—could conceivably speak a different language. Teams at the central office might speak English, while each regional office speaks another language and each local office speaks yet another language. If you’re not careful, you can quickly end up turning your organization into a virtual tower of Babel—where no one knows if the organization is moving in the right direction. Your software needs to support multiple languages so information can be shared with everyone on every team.

What to look for in a global solution:

Requirement	Feature	Function
Each user able to access the software in their native language	Multi-lingual	Language options configurable by workstation, so that two people sitting side by side can each access the system in their native language.

Cultural faux pas: Wearing shorts to the Silver Pagoda in Cambodia. www.tourismcambodia.com
Operational faux pas: Requiring teams to communicate in a single language across all locations.

Working with information

Once you have gotten team members to access and share information, you need to be sure they are using the information available to operate as efficiently as possible. You want them regularly monitoring data to make smarter decisions. That means each user should have the level of access appropriate to their role and their relative position in the information stream. Users at the central office are likely to have very different needs than users in field offices. Their focus will be on control and consistency. They will want to ensure they can effectively manage awards and grants and then disseminate funds to field offices. Users downstream in regional or field offices will have a different set of priorities. They are more likely to be concerned with usability and accessibility; therefore, they will want a simple interface that pushes information to them. Your software needs to be powerful enough to accommodate the requirements of team members wherever they are located.

Central Office

The central office has primary responsibility for awards and grants and fundraising activities. Staff must manage regulatory reporting and compliance and ensure activities are in keeping with organizational missions and objectives. Central office teams need an accounting application that can take care of the basics like cash receipts and disbursements, payroll, budgets, and financial statements, as well as the unique requirements of non-profits like fund management, overhead allocations, and award and grant monitoring. They need to be able to push information out in different currencies and languages while accumulating results from a myriad of sources.

What to look for in a global solution:

Requirement	Feature	Function
Manage transactions	Core accounting modules—AR, AP, GL, Payroll, Project Costing	Detailed tracking, flexible structure for tagging and accumulating costs, multi-currency capabilities, flexible chart of accounts that supports roll ups from different countries
Track awards and grants	Grant management, fundraising solutions	Centralized origination and monitoring with ability to disburse funds in local offices in the correct currencies
Allocate overhead	Grant management	Manage the grant from the central office and calculate indirect costs based on spending in field offices
Communicate with others downstream	System reports, dashboards, electronic data sharing, portals	Push information to users via dashboards and alerts to minimize the time they spend in the system
Create financial statements	Financial statement report writer	Conform with GAAP and IFRS requirements
Consolidate financial statements across different charts of accounts	Financial statement report writer, dimensions	Support both cross-organization consolidation and custom financial statements

Cultural faux pas: Bringing up business in a Mexican home before your host does. www.mexperience.com

Operational faux pas: Setting grant budgets based on your home currency rather than those of field offices.

Regional Office

Each regional office has to share information upstream and downstream. These offices accumulate information from field offices for reporting back to the central office. Consolidation and reporting features will be important to staff in these offices.

What to look for in a global solution:

Requirement	Feature	Function
Enter transactions quickly and easily in local language and currency	Core accounting modules—AR, AP, GL, Payroll, Project Costing	Easy access to transaction entry
Summarize information from different offices and in different currencies	Report writer, multi-currency	Ability to roll up transactions in different currencies and with different account numbers and reporting structures
Clear reporting	Dashboard	Need to see status of projects against budget

Cultural faux pas: Hailing a cab in Greece with five fingers and a raised palm. www.usatoday.com

Operational faux pas: Expecting regional offices to use an Excel spreadsheet to accumulate expenditures from each field office.



Field Offices

Each field office expends funds and then reports back to regional or central offices. Staff in field offices, busy with the job of serving those in need, will want to spend as little time as possible in the software. That means they need an easy to use system that pushes information to individual users.

What to look for in a global solution:

Requirement	Feature	Function
Enter transactions quickly and easily in local language and currency	Core accounting modules—AR, AP, GL, Payroll, Project Costing	Role based access so each user only sees the information that is relevant to his role in an intuitive interface.
Integrated with standard tools	Role centers	Microsoft Outlook integration
Visual cues about work to do	Workflow	Notifications and alerts to keep users moving forward

Cultural faux pas: Referring to a woman hosting an event as the “hostess” in the Philippines.
www.kiwintessential.com.co.uk

Operational faux pas: Expecting field offices to capture their activities in your reporting currency.

Bringing everyone together

The right tools can help even the most widely distributed teams work together. They can foster communication and help organizations avoid the roadblocks that can distract them from their mission. They can bridge infrastructure gaps while freeing information to flow and users to serve. The right tools can resolve currency differences and make reporting across multiple locations seamless. They can bridge language barriers and serve up information that meets the needs of every user. With the right tools, you can stop worrying about committing an operational faux pas and devote your full attention to serving the needs of your global community.

About Serenic Software

Serenic Software develops and delivers mission-critical ERP software solutions for public service organizations including: K-12 school districts/boards, public sector, nonprofits (NPOs), and international non-governmental organizations (NGOs). Serenic is a Gold ERP and ISV vendor and a development partner for Microsoft. Serenic public service solutions are trusted by over 1,000 organizations around the globe. You can learn more about Serenic Software at www.serenic.com.

About the Author

Geni Whitehouse, CPA.CITP, CSPM, is a speaker and writer and the Countess of Communication at Even a Nerd can be Heard. She is a former partner in an Atlanta CPA firm, and a former software executive on a mission to eliminate boring from the worlds of accounting and technology. She is the author of *How to Make a Boring Subject Interesting: 52 ways even a nerd can be heard*, which is available on Amazon.com.

Serenic Software

USA | Canada | UK

TF: 877.737.3642

TEL: 303.980.6007

marketing@serenic.com

www.serenic.com

