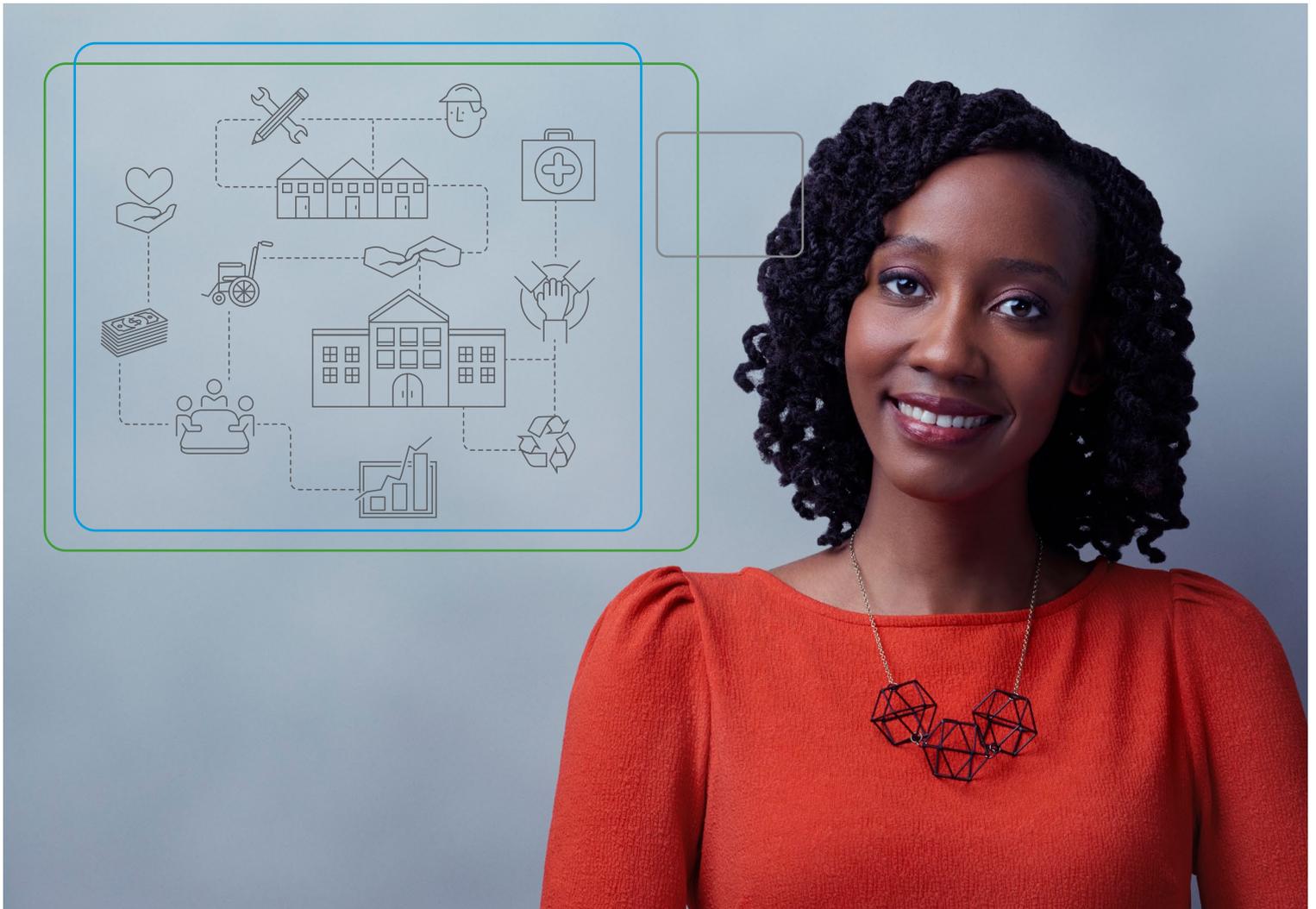


MEASURING IMPACT, INSPIRING CHANGE



2022 NONPROFIT INDUSTRY LOOKBACK

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2022 was a year of great change for the nonprofit community

Nonprofits continued to manage their organizations through the pandemic while also facing the tremendous impact of technology, workforce and funding shifts. While RSM has served the nonprofit community in many ways for over 80 years, it's fair to say that this was the year we had the greatest impact. Through the powerful combination of financial contributions, volunteer time and deep industry knowledge, we partnered with hundreds of nonprofit organizations to improve their ability to deliver on their missions.



Stewardship is a core value of our firm and drives our approach to every organization—especially as we seek to utilize our skills in providing assurance, tax and consulting services to help our nonprofit clients operate more efficiently and confidently and manage their resources to serve their communities better.

Serving so many innovative and remarkable nonprofit organizations is truly an honor. Our nonprofit-focused professionals are committed to this industry and passionate about their work. They excel in their work because they are driven to help nonprofits fulfill their core missions and help organizations thrive today and well into the future. This report summarizes the total impact on the nonprofit community during this period as we continue to expand our capabilities and commitment in the years to come.

Michele Juliana

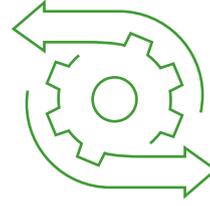
Enterprise nonprofit and
education leader



By the numbers: RSM and the nonprofit industry



Number of hours serving nonprofit clients in 2022



Number of nonprofit clients with RSM's outsourced operations



RSM professionals serving the nonprofit and education industry



Number of technology providers we support



2022 Partner of the Year Winner Nonprofit Award



Number of clients by subsector

Membership associations		1,343
Charitable		1,243
Foundations		1,051
Educational		676
Religious	214	
Humanitarian and relief	178	
Cultural	116	
Research and scientific	87	



Making an impact through digital transformation



[Digital transformation](#)—using technology to fundamentally change how an organization operates—is essential for any nonprofit that wants to stay relevant. Digital transformation is about creating a new foundation that supports the entire nonprofit. Organizations that adopt this mindset are not just enhancing their technological abilities; they are building a road map for the future.

HOW RSM HAS HELPED

RSM has helped many nonprofits through their digital transformation journeys. This transformation involves a comprehensive and strategic approach that includes everything from simple process changes to complete system replacements. For example, we have helped nonprofits automate and enhance their donor and member communications, streamline their conference registration process, and provide access anywhere through cloud technologies. This increasing confidence in financial and operational information helps support better decision making and enables organizations to be better stewards of their limited resources through automation, system integration and optimization of the user experience.

THE RESULT:

“Microsoft Dynamics has helped our organization better fulfill our mission. This technology has enabled us to scale up to serve more clients and communities. Dynamics has helped make our processes and communication more efficient across our team, which has empowered us to serve more households with greater impact.”

Mark Jackson, vice president, CHP Energy Solutions



IMPACT IN ACTION

Community Housing Partners Energy Solutions' digital transformation is on a mission

Community Housing Partners (CHP) is a nonprofit focused on creating homes and communities that are healthy, sustainable and affordable.

The tech challenges CHP Energy Solutions couldn't ignore

Through all its success and growth, CHP Energy Solutions embraced technology and used what it had to the fullest. But as with many nonprofits, budgets were tight and programs expanded; eventually, its systems could not be maintained.

RSM's solution: Simplify processes and prioritize CHP Energy Solutions' mission

RSM's team of [Microsoft Dynamics](#) advisors worked closely with CHP Energy Solutions staff to help them [digitally transform their organization](#). These improvements standardized procedures, improved efficiency and increased employee satisfaction leading to reduced turnover in their workforce. When they were able to optimize their service routes and equip technicians with mobile devices, this eliminated dependency on the central office and reduced inspection time by 60%. By inspecting homes more quickly, CHP is now able to help more people have energy-efficient homes, lower their expenses, and live in safer and more stable housing.



Making an impact through data analytics



Nonprofit organizations frequently find themselves surrounded by vast amounts of data, yet having access to extensive information is not the same as gathering actionable intelligence from data. The challenges are numerous: managing disparate data stored across various systems or spreadsheets; ensuring that member or donor information is trusted, accurate and used consistently across the organization; embracing automation and streamlining processes to use data more effectively and efficiently.

Many nonprofit leaders feel overwhelmed by the technology options or believe their organization must invest in multiple platforms and increase staff to tap into the power of [data analytics](#). That's not always true.

HOW RSM HAS HELPED

Our professionals approach [data analytics solutions](#) with three related questions in mind. First, what is the nonprofit trying to accomplish? Second, how can data analytics help achieve that goal? Third, what will the organization do once it gains access to this data? Better yet, consider the critical four: data literacy, acquisition and governance, knowledge mining, and business implementation.

IMPACT IN ACTION

The American Planning Association enhances member journey visibility through the power of data analytics

The American Planning Association (APA) is an independent, nonprofit educational association organized to advance the art and

science of urban and regional planning. APA provides leadership in the development of vital communities for all by advocating excellence in planning, promoting education and resident empowerment, and providing members with the tools and support necessary to ethically meet the challenges of growth and change.

Data as a strategic asset

APA's goal was to better understand its members and gain visibility into their members' journey's. Time-consuming manual data capture and reporting processes often resulted in delayed decision making, missed opportunities for member growth campaigns and miscommunication across the organization. APA needed a strategic road map to increase its data maturity and build an analytics-rich organization focused on leveraging its data as a true asset.

RSM's solution: Unlocking business insights with data and reporting analytics and governance

To realize its data vision and goals, APA partnered with RSM to implement an enterprise data warehouse, utilizing Microsoft's Azure BI stack, Power BI for reporting, and an integrated data governance framework to manage and control its data. Together, we built quality dashboards auditing the success of their governance program, further enhancing their insight around where their members were geographically located, who they were—from student to professional to retired advocates—and how APA may best retain their members to avoid excessive churn during economic downturns.

THE RESULT:

“In a world where information evolves second by second, the ability to merge unique data into a single warehouse available for on-demand mining is an unparalleled benefit for the business. This access and flexibility are crucial for day-to-day operations while enhancing our ability to model for the future. RSM created a comprehensive plan transitioning us from a system that required constant IT support to one that empowers staff to generate the information they need on demand.”



Mark Ferguson, chief information officer, American Planning Association



Making an impact through outsourcing



Feeling overwhelmed shouldn't be a natural state. Yet nonprofits often struggle to manage critical operations—IT, human resources, accounting and more. Many of those functions are not part of their core mission but are necessary for a best-in-class nonprofit organization. In such cases, outsourcing can mean the difference between a surviving and a thriving nonprofit organization.

HOW RSM HAS HELPED

Last year we [outsourced operations](#) for over 600 nonprofit clients. Working with our managed services professionals, organizations have access to [people](#), processes and cutting-edge technology that help alleviate stress and free employees to focus on big-picture, strategic innovations that help nonprofits fulfill their missions.

IMPACT IN ACTION

Washington Nationals Philanthropies receives a customized managed service approach

As the official charitable arm of the Washington Nationals baseball team, Washington Nationals Philanthropies (WNP) champions opportunities for all residents of the greater Washington region to thrive by inspiring investment in the community.

THE RESULT:

“Right away, we were able to see that with a new software platform and certain financial functions fully digitized, we stood to save a considerable amount of time. The new capabilities allow us to answer questions easily, process transactions more quickly and ensure that a key resource—staff time—is used more effectively.”

Champions on and off the field

The Washington Nationals organization intends to match their team's success on the field with impact on the local community. And like a World Series champion team, this required the right players in the right positions.

Working together

With its depth of experience and keen understanding of the nuances of the nonprofit industry, the RSM team was able to execute a [quick diagnostic assessment](#) of their accounting operations. RSM established a foundation for success by uniquely analyzing WNP's structure around people, processes and technology to develop tailored outsourcing solutions.

A winning team

The organization's drive to be a regional philanthropic leader remains strong. The WNP's chief operating officer pinpoints several ways RSM's nonprofit experience and approach have proven vital to increasing WNP's effectiveness. Among the positive results is a budget process that is administratively easier yet offers more structure, enhanced technology, more efficient systems and processes, and ready access to financial data that is timely, accurate and meaningful to the organization.



John Bramlette, chief operating officer, WNP



Making an impact through community



> RSM US Foundation

In 2014, our firm established the RSM US Foundation as part of our giving strategy and to support our value of stewardship: acting responsibly. In 2022, the RSM US Foundation provided more than \$8.9 million in grants. We've taken our reporting a step further to include charitable giving through our firm and personal donations from our people toward RSM-supported causes, bringing our annual total up to \$9.8 million.

RSM US FOUNDATION 2022 CHARITABLE GIVING - \$9,813,853



The reporting period is for Jan. 1, 2022–Dec. 31, 2022. Specific program giving is in conjunction with the RSM US Foundation and includes fundraising efforts by RSM US LLP employees and partners. Other giving includes both RSM US Foundation and RSM US LLP charitable contributions not associated with a specific foundation program. For RSM US Foundation-only giving, visit our website.

RSM volunteerism

> Power of Love

It was a record-setting year for our [Power of Love](#) program which amplifies the fundraising and volunteer efforts of our people in the areas where they live and work. More than \$6.7 million was donated to local charities focused on creating stable environments for youth across the United States, Canada and India, and 4,000 RSM employees, friends and family members volunteered an amazing 19,500 hours in their local communities. Our employees in India generated our biggest volunteer grant to date, with more than 5,000 volunteer hours resulting in a grant of \$79,750 to a local charity focused on educational equity and celebrating diversity.

Fiscal Year 2023 IMPACT REPORT

Our RSM US LLP Fiscal Year 2023 Impact Report provides a comprehensive look into our business and key programs over the last year. In it, you'll learn more about our work to strengthen the services we provide, enhance diversity within our firm (and beyond), deliver leadership in the places we live and demonstrate our commitment to protecting the environment.

[Click here to read the entire report >](#)



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