

HOW CAN WE BECOME MORE EFFORTLESS, EFFICIENT & COMPLIANT IN OUR DAY TO DAY OPERATIONS?



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Scan this QR code to access the companion video and earn your certification





Do you think, technology tends to exclude vulnerable communities and those who serve them?

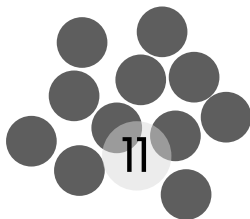
YES

NO

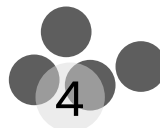
Can't SAY



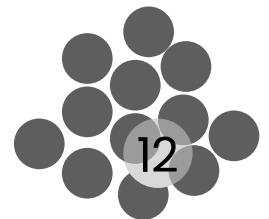
We asked a few participants like you the same questions, and their responses are below for your reference.



Yes



Can't Say



No





MAKING TECHNOLOGY ACCESSIBLE
TO CHANGE MAKERS.



At aikyamfellows.org , We love changemakers and the extraordinary work they do to serve vulnerable communities. aikyam fellows make technology accessible to grassroots, small NGOs and help them amplify their impact.



Goal for this workbook



**How can NGOs
become more
effortless, efficient &
compliant in our day
to day operations?**

We have designed this as a companion workbook to the training video <https://www.youtube.com/watch?v=N00bftOXgPo> you can print out and use a pencil, eraser to interact by writing, re-writing, etc. So lets get started?



WHAT WE CAN'T MEASURE, WE CANT IMPROVE.



Lets begin by reflecting. Where does the organization stand right now in terms of day to day operations.?

for eg: finance, accounts, project management , donor management, etc

People: Experienced, Expert Function team in place

0 1 2 3 4

Clear Practices & Policies in place in the org

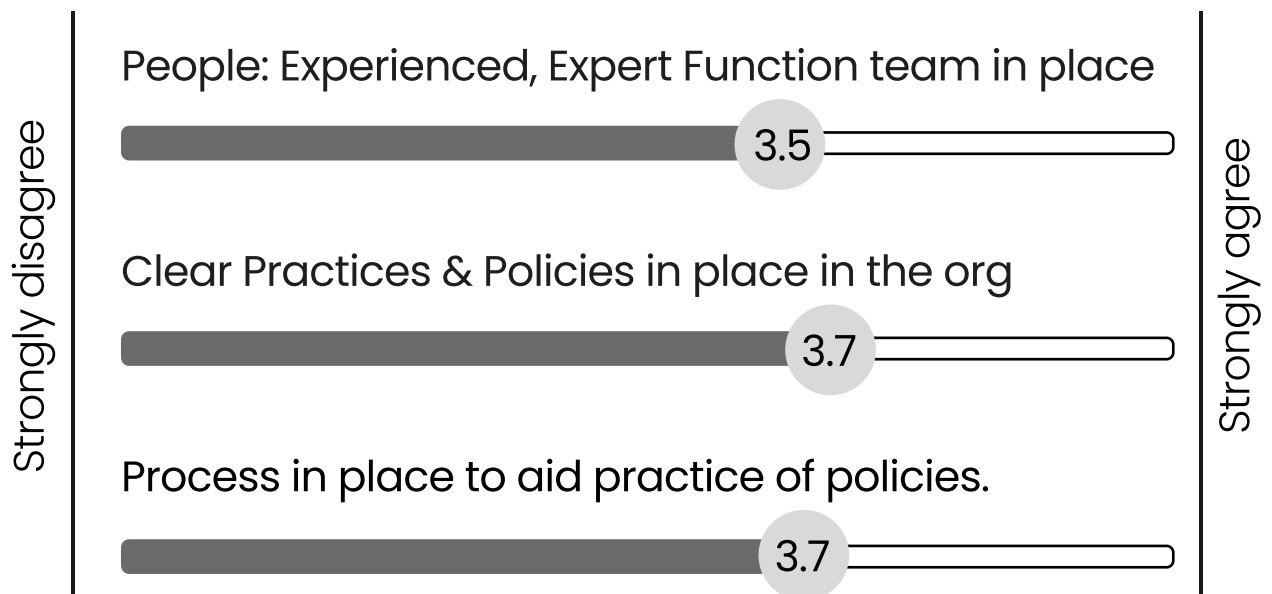
0 1 2 3 4

Process in place to aid practice of policies.

0 1 2 3 4



Where some other participants assessed their organization stood...



As you reflected, What was the feeling you were left with?



Excited



Happy



Anxious



Sadness

Scribble here

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LET'S START BY STARTING
AN INTERACTIVE PROCESS
TO UNPACK AND FIND NEXT
STEPS





Let us Identify important **stakeholders** within and outside your organisation whom we need to consider while solving for this goal

This will help us identify different users who will interact and will be impacted directly/indirectly with any tech solution. We have filled two for you. now can you fill out the rest?

Employees

Donors



Word cloud of important stakeholders identified by other participants in the workshop.





Any solution to our goal will have to keep the needs of the key stakeholders in mind. Isn't it?



Employees



Operations (HR/
Admin)



Accountants



Vendors,
Consultants



Senior
Management



Board



Partner NGOs



Donors,
Supporters



Institutional
Donors, CSR



Communities
we work with



Chief Finance
Officer



Auditors



Compliance
Agencies





What were your thoughts while identifying stakeholders

- New stakeholders identified who tend to get excluded
-
- Was able to see the bigger picture, interdependence

Scribble here...

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Now lets identify the **key needs** of the important stake holders we have identified.

This will help us understand the benefits we need from the tech. We have identified a few key needs of the stakeholders for you, now its your turn.

**Timely submissions,
filings to government
portals**

**Better Performance
management for
employees**





Key needs of the important stakeholders identified by the members in the sessions.

Information

Dashboard

Due Diligence

Compliances

Policy making

Pay roll system

Auditors and Donors need timely reports

Simple ways to track fund management and...

Preparation Policy manuals

HR- Simple onboarding process, Easier recruitments.

Visibility of work to larger audience and funders.

Faster training for employees using pre-existing data & functions.

Accounts- quick consolidation of expenses for deferent report needs.

Internal communication of policies for staff.

Better Performance management for employees



Expanded version of Key Needs of the Important stakeholders...

Compliance Agencies, Auditors, Board

- Timely submissions, filings to government portals, public access to documents
- Verify books of records, Ledgers
- Board presentations/documents for review and inputs during board meetings

- Processes, Policies in place with partners/grantees.
- Timely reports in certain formats for – Program update, Fund Utilisation, Budget vs actuals, Audited Financial Reports, Annual Reports
- Impact Studies, Metrics, Monitoring & Evaluation, Stories from the ground

Institutional Donors, CSR

Individual Donors, Volunteers, Website Visitors and Social Media Followers

- Need easy way to give donations, volunteer, contact
- 80G Certificates, Volunteering certificates
- Stay updated on the work being done so they can give again



Employees -
Management
Team, Field Staff,
Senior
Management

- Computers, devices, identity
- Hiring, Onboarding, Induction and growth processes
- Training on processes, policies at the organisation for different needs like Leave, Expense Claims, Advance, Travel, etc that will improve their daily work
- Access to Learning materials, content, pathways to upskill, Knowledge Management
- Timely processing of travel requests, expense claims, salaries, leave approvals
- Work planning and project tracking
- Communicating real time, async with team members
- Dashboards, measures on progress of programs, support needed that change directions, adjustments as needed.

- Board approved policies and processes in place
- Budgeting & Monitoring for projects
- Policy implementation & tracking tools across HR, Accounts, procurement, payroll, etc workflows. Need help from all team members.
- Proofs of decision making, approvals, etc
- Net banking account
- Avoid repeat work
- Document Storage, organising and retrieval
- Deliver high quality HR programs

Accounts/
Finance Team,
Operations
Team, CFO, CEO





What did you take away from this activity?

- Understanding the needs is an important step
- Knew much of these.
- Learned alot.

Whats on your mind?

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How does this activity of identifying needs of so many stakeholder make you feel?



Excited



Happy



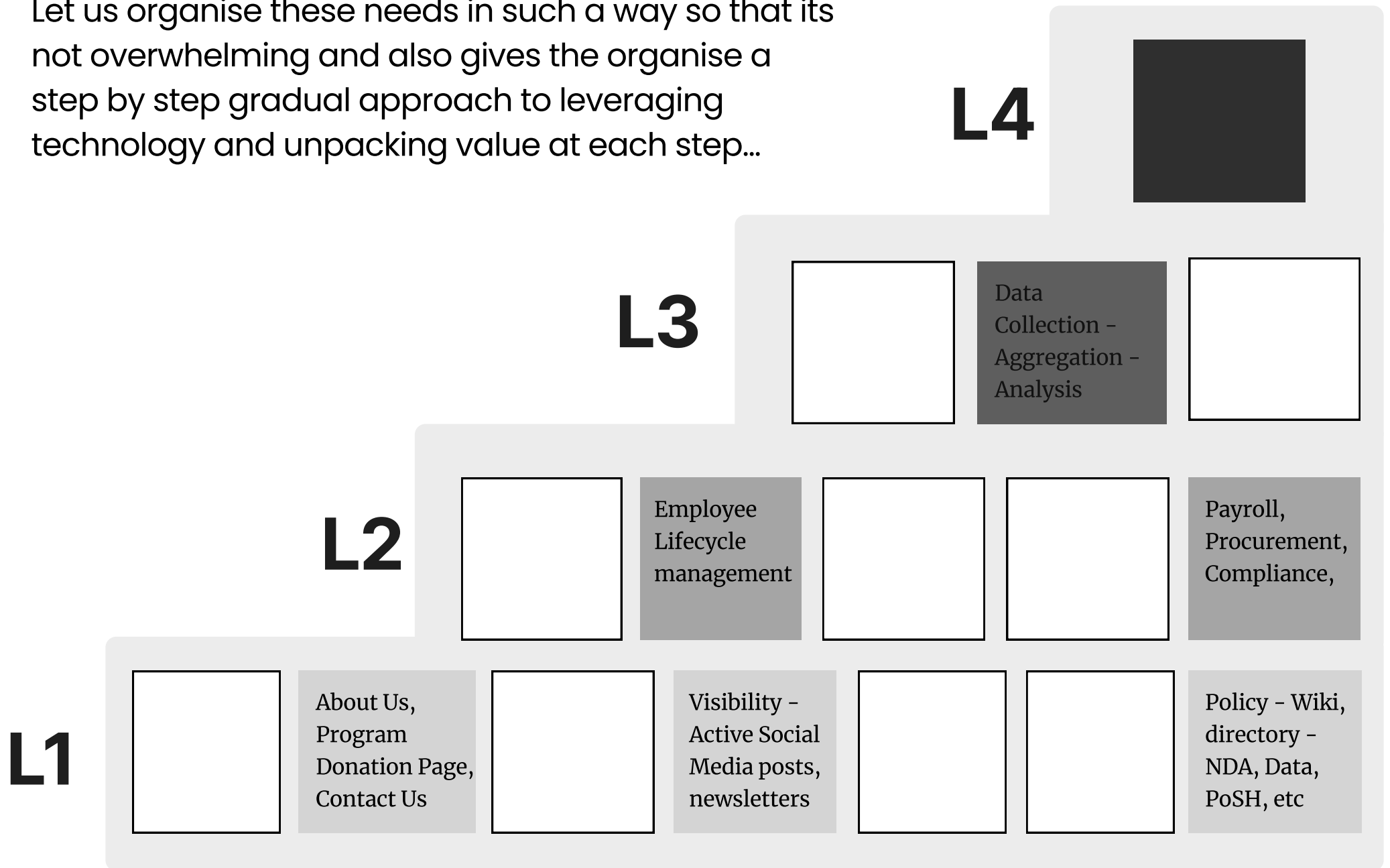
Anxious



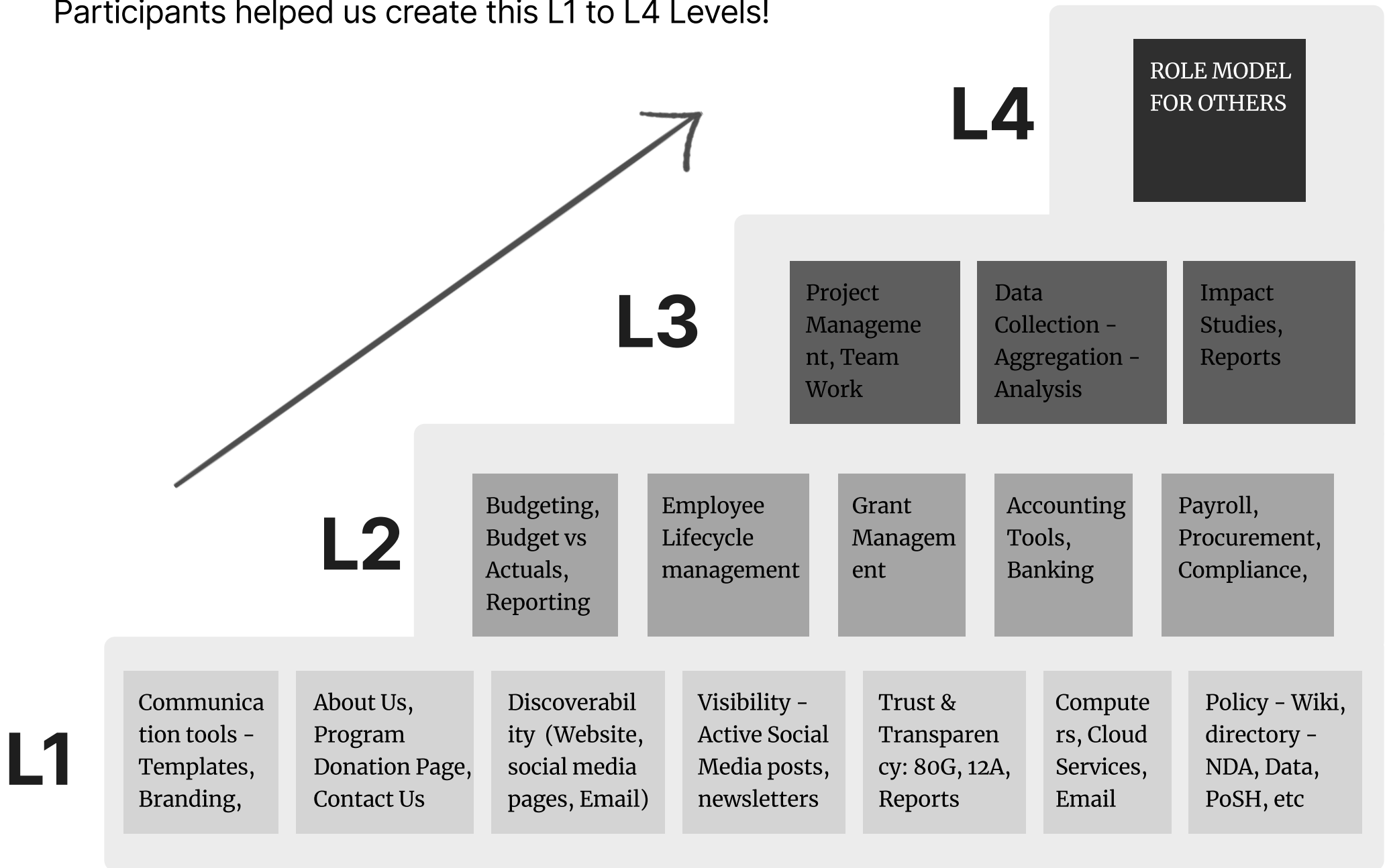
Sadness



Let us organise these needs in such a way so that its not overwhelming and also gives the organise a step by step gradual approach to leveraging technology and unpacking value at each step...



Participants helped us create this L1 to L4 Levels!





What did you take away from this activity?

- New perspective.
- Knew much of these.
- Learned alot.

Whats on your mind?

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How does this activity makes you feel?



Excited



Happy



Anxious



Sadness





So now, What could be some **key barriers** for the organisation while climbing these levels?

Miscommunication

Lack of resources



Responses from our participants...

Miscommunication

Lack of resource

Lack of knowledge

Fund delays

Management issues

Delays in approval

Geographical spread. Diversity of the staff.

Inadequate bandwidth/
resource

Lack of good budgeting tools for NGOs

Difficulty in communication from remote field areas.

Manual process of tracking and management.

Lack of upskilling platforms and knowledge sharing.

Cross organizational defferences in documentation of work

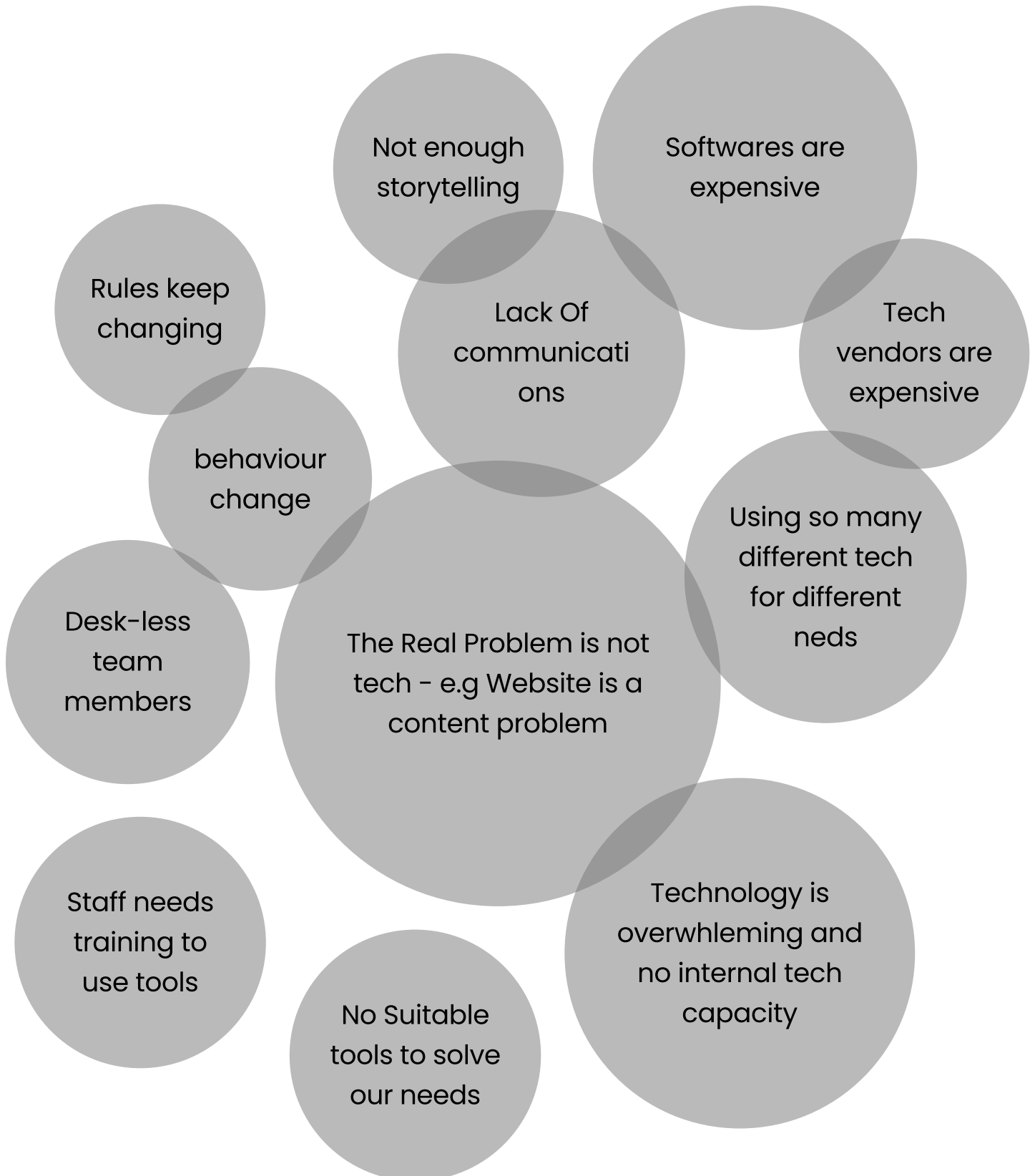
Shortage of leaders who can guide the right path.

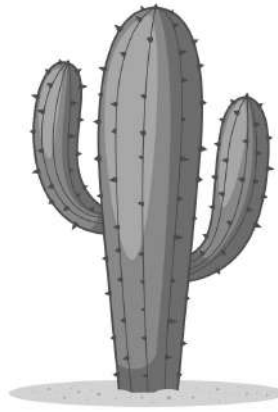
Time delayed approval process, lack of awareness and alertness





Visual: **Key barriers** while climbing this ladder...





What did you take away from this key barriers activity?

- New perspective.
- Knew much of these.
- Learned alot.

Whats on your mind?

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How does this activity makes you feel?



Excited



Happy



Anxious



Sadness

HOW CAN TECHNOLOGY HELP OVERCOME THESE BARRIERS?

ERPNext

Can be of great help!

What is ERPNext?

ERPNext is one of the best open-source enterprise resource planning (ERP) software you have ever seen. It is free and open-source software that you can use to manage your NGO or organization.

<https://erpnext.com/>

Some of the advantages of ERP Next

- It has a practical and easy-to-use interface
- It is freely available. No license charges
- You can implement this software by yourself
- With its comprehensive features, it saves your time and money



can run on a cloud server for less than 20\$/month and offer the following and more!

Website Management

- Content management system for websites
- Blog, web page, and form management

Accounting

- Manage accounts and transactions
- Tax handling
- Multi-book and consolidated financials
- Bank statement sync
- Budget Tracking & Management
- Multi-currency

Asset Management

- Asset registry, tracking
- Depreciation methods application
- Asset capitalization and decapitalization
- Serialized asset management
- Capital work-in-progress accounting

Project Management

- Task Management
- Dashboards

HR

- Leave and attendance tracking, Expense claims
- Employee lifecycle tracking, Recruitment, Performance management
- Automated Payroll with configurable benefits and deductions

Super powers

- Data Analysis, Insights
- **Fully Open Source**
- Create own doctype, registries
- Workflows creator

Supporters, Volunteers, Donor management

- Lead capturing and tracking
- Managing open queries
- Payment Gateway integration, 80G



WHERE TO LEARN **ERPNext**?

FSchool

<https://frappe.school/>



<https://oasishq.org/>



<https://aikyam.school/>

Hey, lets be part a
community to learn share
and discuss.



Scan and Share your
workbook? & ask doubts/help.



To join scan the QR code.

Many of the barriers you identified can be addressed by ERPNNext alone, while the remaining 20% can be tackled using other FOSS tools



Open-source Alliance for Social Innovation & Sustainability

OASIS is a network of organizations united by the vision that Free and Open-Source Software (FOSS) can empower citizen sector organizations and communities to create positive impact at scale.

<https://oasishq.org/>

- Kobotool Box
- Metabase
- Github pages
- Discourse
- Ghost Blogs
- and many more

<https://aikyamfellows.org/toolkit/Showcase>