



DUCKS UNLIMITED:
GOING BEYOND FINANCIAL
PERFORMANCE MANAGEMENT
TO ACHIEVE GREATER SUCCESS



www.ducks.org

Company Profile

Ducks Unlimited Inc. is the world's largest nonprofit organization dedicated to conserving North America's continually disappearing waterfowl habitats. Established in 1937, Ducks Unlimited has conserved almost 15 million acres thanks to contributions from more than a million supporters across the continent. Guided by science and dedicated to program efficiency, DU works toward the vision of wetlands sufficient to fill the skies with waterfowl today, tomorrow and forever. For more information on our work, visit www.ducks.org

Industry

Nonprofit

Country

United States

ERP System

Microsoft Dynamics 365 F&O

Solver helped Ducks Unlimited become more efficient, more informed, more capable of meeting challenges and confident in their financial reporting capabilities.

Ducks Unlimited's (DU) IT portfolio was woefully antiquated and required replacement after many years of neglect. Govan Hornor, the new CIO, was assigned to remedy the situation. First thing he wanted to tackle: the legacy financial and accounting system. It was the most out of date and a significant weakness for the organization because of potential negative impact on the company's ability to gain supporters. Supporters who require that the company confidently demonstrate financial strength and fiscal responsibility.

The process of updating their financial and accounting system began with a typical RFP process where they evaluated 10 ERP systems. From that process, Ducks Unlimited ultimately selected Microsoft's Dynamics 365 F&O. The original plan was to write native Dynamic reports within the tool, but Hornor soon realized that the tool lacked long term efficiency for developing the financial reports DU needed.

The search began for a more robust reporting tool. Through their Microsoft partner, DU looked to Solver. From the demo they viewed, DU thought Solver would fit their needs with their out-of-the-box reports and easy-to-create custom reports. An added bonus was discovered when DU entered their annual business planning cycle and used Solver's invaluable budget planning functions.

After several years of use, Hornor says the tool set and canned functions available with Solver have been very reliable and useful, exceeding expectations.

In terms of critical processes, Ducks Unlimited uses Solver for all their financial reporting and research needs. Financial achievement is monitored throughout the year by comparing planned (budget) versus actuals, their primary means of monitoring company performance. They discovered that key attainment indicators found in the Solver toolset do a great job of keeping the fingers of DU management on the pulse of the company.

Performance Management for Nonprofit Oversight

Ducks Unlimited's implementation project included integration of data from a multitude of events, membership and grant programs. The complexities of which included data from more than 4,000 events each year across the nation, as well as, over 700,000 members contributing money to DU's mission. They use these funds to 'unlock' many government and private grant programs.

Although the actual philanthropy and grant tracking happen in other systems, data feeds from DU's Fundraising and Conservation project systems allow a large portion of data storage in the Solver Data Warehouse.

This provided the DU accounting and finance power users to not only create custom reports to efficiently keep track of finances throughout the year, but manage and report on incoming revenue and track outgoing expenses towards their mission.

Hornor clarifies, "This is a very critical function for a 501C3 nonprofit, and by using Solver, Ducks Unlimited can do that quite nicely."

The benefits Ducks Unlimited realized were significant. The agility provided to their Accounting and Finance team is one of the key benefits that stands out. With a 65-member Board of Directors that are very active and involved in the company, it can be challenging to quickly answer the many questions that arise. DU uses Solver to quickly pivot and give their Board and Leadership team the answers they need to keep DU very healthy and on top of their conservation game.

Ducks Unlimited's CPM Goals for the Future

What's next for corporate performance management tools for Ducks Unlimited? DU plans to replace their conservation project system. Unlike most nonprofits, DU performs their mission delivery along with providing advocacy and funding. Their wetlands conservation work resembles construction company projects. They expect Microsoft Dynamics 365 F&O to be a great fit for that system's replacement.

With the bones of Microsoft Project and Excel embedded in the structure of the Dynamics 365 F&O environment, they are confident that the system will be up to that task.

DU realizes however, they have unique planning and financial management needs and expect to address them using Solver. Their intense planning and forecasting needs is another exploration area utilizing Solver tools.

Using Solver to Go Beyond Financial Management

With Solver's comprehensive toolset, Ducks Unlimited broadened their Solver use to manage other areas of their business besides finances.

One such example aids in monitoring their 'revolving lands' business model. In this instance, DU purchases a parcel of land, restores the wetlands, places a protective easement on it and sells it. The proceeds from that sale are used to purchase another parcel of land. DU uses Solver to track and report on their land portfolio.

"Tracking the land portfolio allows us to stay on top of the market in various areas around the country," Hornor explains. "With multiple funding sources being utilized to add to that portfolio, it can get complicated and Solver allows us to view the exact health of our portfolio constantly."

Another way DU uses Solver beyond financial management is monitoring their mission efficiency. Most nonprofits measure overall efficiency as a ratio of how much of their donations apply directly to mission versus how much goes to overhead. DU uses Solver to keep their ratio front and center while navigating each monthly cycle.

Results Realized and Furthering Ducks Unlimited's Mission

Solver brought many efficiencies to DU's processes. Their monthly financial reporting includes the distribution of income to budget comparisons for over 250 cost centers. This process formerly required 3 days of printing,

organizing and mailing. With the Solver Cloud portal, the reporting is available to all managers whenever they need it, delivering flexibility and allowing accounting to concentrate on matters more important than distribution.

The budgeting process has also been improved. Detailed budgeting benefits from historical performance and current forecasting using trending information.

Better and more timely information affords DU a strong basis for budgeting processes.

During COVID-19, Ducks Unlimited found increased importance in cash flow analysis and forecasting. With this information, Solver kept leadership aware of current and future cash trends. Overall, DU was more efficient, more informed and better able to meet rising challenges.

Probably the most important contribution Solver provides to DU's mission is increased confidence in their financial reporting capabilities. Solver allows DU to dive deep into their financial health and adjust processes and practices, demonstrating stability and strong growth.

Honor states, "Our legacy system was so deficient in basic visibility of many financial elements, while Solver gave DU the kind of transparency to all financial measures that instilled confidence in not only staff, but major donors and large companies. Everyone wants to invest in a winner and Solver showed how much of a winner Ducks Unlimited really is!"

Weathering COVID-19

Solver has played an enormous role in Duck Unlimited's ability to navigate the many new challenges presented by COVID-19.

During the crisis, it was immediately obvious that cash management would be extremely important. DU's over 4,000 in-person events are a major cash supply that the organization relies on each spring and fall. COVID-19, however, forced DU to cancel or reschedule half of them.

This posed a scary cash flow issue for DU. Solver monitors and projects their cash position and will do so over the coming months. Solver allows DU to accurately show their daily cash balance and report this to leadership.

Although the current environment has been completely unexpected, DU has monitored their business health from crisis day one.

Another positive outcome that DU discovered with Solver was scenario planning in advance to predict cash burn. This knowledge has proven an invaluable navigational tool through the many already faced and continuing headwinds.

Armed with this information, DU has been able to appeal to their members for help and receive quick responses, showing that their supporters continue to back the Ducks Unlimited mission.

Resources

[Overview of the Solver Suite](#)

[Whitepaper: Budgeting Process Best Practices](#)

[Whitepaper: Solver for Nonprofit](#)

[Blog: What You Need to Streamline Your Budget & Forecast Process](#)