



ASCEND
NONPROFIT SOLUTIONS

— ANNUAL —
IMPACT REPORT

FY22-23

LOOKING BACK...AND MOVING FORWARD

It is with immense pride and gratitude that we present to you our Annual Impact Report for FY23. This report reflects our journey, achievements, and the unwavering commitment of our team to serve the nonprofit community.

In a world marked by unprecedented challenges, we have overcome hurdles, adapted to change and forged ahead with determination. Not only have we upheld our core values, we have made significant strides toward our long-term vision.

Our success has been a collective effort resulting from the hard work and dedication of our 30+ team members and the unwavering support of our volunteers and stakeholders. Together we have served 54 nonprofit organizations and programs. Collectively they are serving our communities most vulnerable citizens. Additionally, our Center was visited by more than 20,000 people in the past year.

In the spirit of transparency and accountability, this report provides insights into our financial performance, showcasing how we have managed and allocated resources efficiently to advance our mission.

Looking ahead, we remain committed to continuing to multiply our impact by building capacity across the nonprofit sector. Our goals are ambitious, and with your continued support and collaboration, we are confident that we can achieve them. The road ahead may be challenging, but our dedication to making a meaningful impact remains steadfast.

As we turn the pages of this report, let us take a moment to celebrate our shared achievements,

express our gratitude to those who have made it possible, and renew our commitment to the work ahead.

It has been my honor and privilege to serve the nonprofit sector for 39 years; Ascend Nonprofit Solutions (formerly Children and Family Services Center) and its partner agencies for the past 12, and to have worked with such a talented, dedicated group of professionals. I am very proud of all Ascend has accomplished in the past 20 years. Our story started with a small group of nonprofits trying to solve common problems, and has grown into a national model for nonprofit collaboration and shared services delivery. Since inception, we have increased our impact from serving nine agencies to 63 in a multitude of ways. A truly remarkable journey.

As I pass the torch to our new President and CEO, James L. M. Taylor, I'm confident that he will lead Ascend through a new chapter and find fresh, innovative ways to help our partners build capacity and increase impact.

Thank you for being an integral part of our Ascend family. Together, we will continue to write stories of progress, resilience, and positive change.

Warm Regards,



Shelley D. White
President and CEO



2022 - 2023 Board of Directors

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Bill Currens

Renaissance West Community Initiative

Tom Coyne

Safe Alliance

Wendi Fleener

Council for Children's Rights

Barry Metzger

RAIN

Diamond Staton-Williams

Communities In Schools

Scott Vaughn

United Way of Greater Charlotte

Pamela Wideman

United Way of Greater Charlotte

▶ YEAR IN REVIEW ◀



Celebrated our 20 year anniversary



Launched a new name and brand, moving from Children & Family Services Center to Ascend Nonprofit Solutions



Added United Way of Greater Charlotte, Supportive Housing Communities and Smart Start of Mecklenburg County to HR and Communities In Schools to Finance



Our shared services and shared space model generated \$3,256,273 in savings for partner agencies



With support from United Way of Greater Charlotte, 18 Unite Charlotte agencies were fully onboarded with Shared Services



Our network of partners served more than 200,000 people across our region, the majority of whom are living in poverty

20 Years of Service and a New Name



On March 14, 2023, the Children and Family Services Center celebrated a special milestone. It was the 20th anniversary of the nine founding agencies moving into the building. We hosted a celebration with 100 of our friends, partners, donors and other stakeholders to recognize the hard work that was put into bringing this center to life and all that has been accomplished since.



Videos of nonprofit leaders past and present were part of an interactive display and we had a partner expo to showcase the many organizations we serve. We also took this opportunity to make a special announcement, unveiling our new name and brand – Ascend Nonprofit Solutions!



We are very grateful to our sponsors for supporting us through this event: Ally, Cigna, Clifton Larson Allen, First Citizens, iSolved, Lincoln Financial Group, Marsh McLennan, The Keith Corporation and USI.

Pictured top: Then Board Chair, Emily Cantrell, announces the organization's new name and brand

Middle (L to R): Ascend's first Executive Director, Peggy Eagan, and Communities In Schools of Charlotte-Mecklenburg's first Executive Director, Cynthia Marshall

Bottom: Ascend staff celebrates with the new logo

FINANCIAL MANAGEMENT

Like many local nonprofits, Communities In Schools of Charlotte-Mecklenburg (CIS) has experienced tremendous growth and unprecedented demand for services since the pandemic. Their need to build capacity and scale services quickly became a high priority. Compounded with the retirement of their long time finance manager, CIS turned to Ascend for help.

CIS President & CEO Men Tchaas Ari points to Ascend's robust experience in nonprofit finance as a leading factor in deciding to partner with us. He shares that our team has brought efficiencies and best practices to the table, allowing him and his team more opportunity to think strategically about financial management.

Without this partnership, CIS would have been left to hire and train new staff and develop new processes and procedures to enhance their infrastructure. Working with Ascend for their finance needs enabled them to remain focused on program delivery. It even created new opportunities for collaboration as Ascend was able to seamlessly transition CIS's in-house accountant over to our team!



"Since the day-to-day financial management has been outsourced to Ascend, we now have the bandwidth to do more forecasting and projections. I am excited that we can spend less time focusing on tactical computations and are able to think more strategically."

-Men Tchaas Ari, President & CEO
Communities In Schools



Accomplishments

29

Agencies Served

\$77.5M

Revenue Managed

100%

Partners Received
Clean Audits

\$693,762

Cost Savings for
Financial Services

HUMAN RESOURCES

The Ada Jenkins Center in Davidson, NC began utilizing Ascend HR services in 2020. The then new President & CEO, Harold Rice, had worked closely with Ascend in his previous role and knew the value it would bring to him and his team as he stepped into this leadership role.

Enthusiastically, Harold partnered with Ascend for Ada Jenkins Center's HR (and finance) needs. Not only did this partnership give Harold freedom and time to focus on program initiatives, it also brought lower cost benefits to his team and provided him with guidance on employee relations, labor laws, compliance and risk management.

Harold strongly believes in the value of shared services. He says that Ascend has helped his agency's bottom line and his Board recognizes the value as well. Harold even works to connect small, emerging nonprofits in his north Mecklenburg community to Ascend so they can access the same capacity-building services that the Ada Jenkins Center has!



"Having utilized shared services in a previous role, I was excited for the opportunity to partner with Ascend again in this role. I had experienced how their mission allowed us to focus on our mission, and I wanted that same continuity when I joined the Ada Jenkins Center."

-Harold Rice, President & CEO
Ada Jenkins Center



Accomplishments

29

Agencies Served

767

Employees Supported

169

Hires Managed

\$299,282

Cost Savings for
HR Services



INFORMATION TECHNOLOGY

Last summer, Smart Start of Mecklenburg County broadened their partnership with Ascend Nonprofit Solutions by extending IT support to their expansive MECK Pre-K program. MECK Pre-K quickly became our largest client with 225 users and 330 devices across 105 locations at the time of implementation.

Once on board with IT shared services, we were able to migrate the early education program to Microsoft 365. This shift helped to standardize and streamline processes across their many locations. One example is when MECK Pre-K needs to update or add an instructional application, it is an automated change across all their devices.

Smart Start shares that centralizing all of their IT services with Ascend was a win-win scenario. Not only did it create continuity in IT support, reduce administrative burdens and create efficiencies in program delivery, it also provided a cost savings!



"Moving our MECK Pre-K program to Ascend's IT services was a huge win for Smart Start. The amount of staff time we have saved has been incredibly helpful. The switch allowed us to continuously update software and user access from one centralized location, rather than managing individual devices for over 200 users. We are so grateful for this support and the improved technology they provided."

-Mike Blackwelder, CEO
Smart Start of Mecklenburg County

Accomplishments

38

Agencies Served

1,250

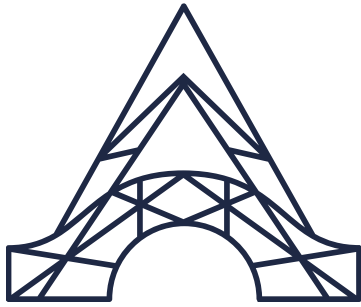
Users Supported

6,441

Helpdesk Tickets
Completed

\$1,648,33

Cost Savings for
IT Services



ASCEND

NONPROFIT CENTER



The Ascend Nonprofit Center is part of a national model known as social purpose real estate.

This concept is focused on spaces that serve the common good and creating assets that strengthen communities. Co-location of services allows for shared costs among partners, reduced barriers for clients and enhanced collaboration among nonprofits. Successes during FY23 include:

- ▶ **\$2,094,896** in rent savings for partner tenants
- ▶ **20,079** guests visited the Center for services, training, collaboration, volunteering, and other social good activities
- ▶ **ARTS+** moved in as our newest partner tenant
- ▶ **HOSTED** a candidate forum with US Representatives from NC's 12th and 14th congressional districts
- ▶ **100%** occupancy in the building
- ▶ **BEGAN** discovery phase to identify locations and needs for satellite sites
- ▶ **CONNECTING** with peer leaders ranked as a top benefit among partner tenant leaders
- ▶ **ACCESS** to tech-enabled meeting space ranked as a top benefit among partner tenant leaders



OTHER SERVICES + PARTNERSHIPS

Fiscal Sponsorships

In direct service to our mission of strengthening nonprofits and enhancing impact, Ascend provides fiscal sponsorship to organizations working to obtain 501c3 status, incubating a new charitable project, or raising funds for a charitable purpose without starting a nonprofit. By extending our nonprofit tax-exempt status, we can accept donations and grant awards on their behalf. FY23 outcomes include:



Fiscal sponsors served



Restricted revenue received on behalf of fiscal sponsors

Unite Charlotte

With support from United Way of Greater Charlotte, we embarked on a 3 year pilot to serve grassroots nonprofits through their Unite Charlotte program. These organizations are largely founded and/or led by people of color and are working to advance racial equity and address economic mobility. In FY23, Ascend accomplished and provided the following:



Full implementation completed for 18 agencies that elected to receive IT, Finance and/or HR consulting

Program Benefits:

- Financial literacy and reporting
- Secure infrastructure with Microsoft 365
- Risk management through HR consulting

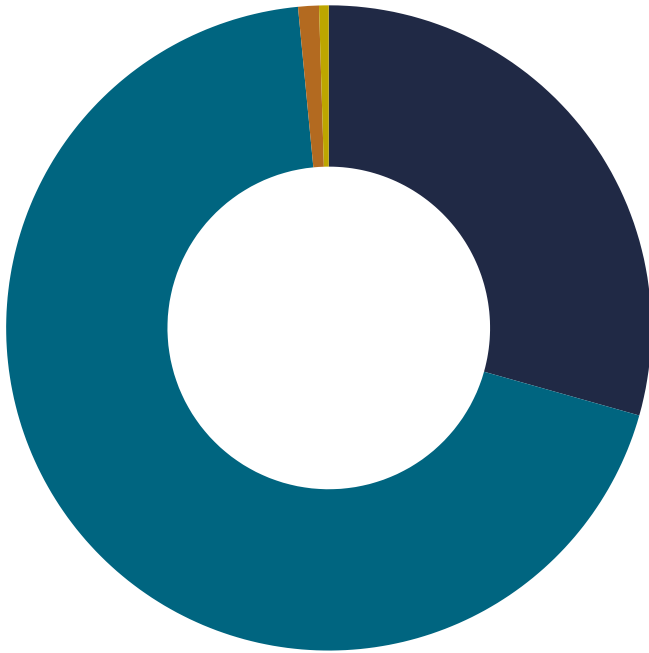
Our Nonprofit Partners



FY23 FINANCIALS

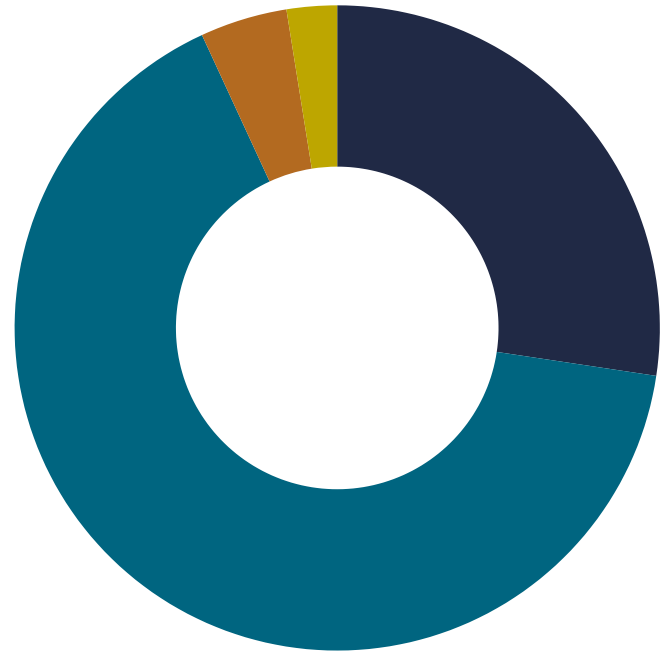
SHARED SERVICES + BUILDING COMBINED

Revenue



- ▶ Facilities
\$1,520,717
- ▶ Shared Services
\$3,577,564
- ▶ Contributions + Grants
\$53,805
- ▶ Interest, Dividends + Gains
\$25,017

Expenses



- ▶ Facilities
\$1,303,847
- ▶ Shared Services
\$3,131,226
- ▶ Engagement
\$207,953
- ▶ Management + General
\$120,005



This chart does not reflect the **\$2,081,870** in donated rent given to our nonprofit partner tenants

*All numbers are based on unaudited financials

**We Do What
We Do Best,
So They Can Do
What They Do Best**



ASCEND
NONPROFIT SOLUTIONS

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