



# Use Case: Not For Profit

## Your organisation

You are the CEO, General Manager or Customer Service Manager of a Not-For-Profit (NFP) organisation. Your sector has a proud history of helping vulnerable people in Australia.

It's a diverse sector; your organisation could be involved in health, social services, education, sport and recreation, arts and culture, environment, animal welfare, human rights and religious practices.

Your organisation works with a variety of people, from service delivery managers and general staff, to volunteers, specialist consultants and SMEs (Subject Matter Experts). Normal operation relies on paper-based forms, including assessments (buildings, people, services and facilities), staff and volunteer inductions, policies and procedures and consent forms.

## Your challenges

With more organisations registering for NFP status and competing for funds from government and donations from the private sector, funding is getting tighter. You're sure that improving efficiency could make your funds go further, but are unsure of how much the improvements will cost.

Your sector is subject to much oversight and compliance, you must keep accurate, complete records and also protect PII (Personally Identifiable Information) and/or PCEHR (Personally Controlled Electronic Health Records). You may also need to adapt to changes in government funding, record-keeping or public health initiatives. Your paper-based systems are slow and prone to human error, which makes it all a lot harder.

Staff turnover is high. It's not easy to keep the best people and staff induction, training, managing, de-hiring and re-hiring are time consuming and expensive.

You may operate nationally and be subject to also to state legislation and requirements. Managing these variations using paper-based forms is complicated and error-prone.

Your IT environment is aging and diverse, including legacy systems that don't easily adapt to change. You'd like to upgrade to more efficient systems but you're concerned about cost and the risk of increasing complexity, especially if your in-house IT resources are limited or already stretched.

## Your options

You may be considering some of these solutions:

### 1. Improve your manual systems

If your form systems remain largely paper-based, it will be difficult to adapt to change, expand operations or services or improve efficiency. More importantly, increased oversight and compliance will increase your administrative overheads, making fewer funds available for operations. *This is the best option if adaptability or cost-cutting are not pressing.*

### 2. Use a simple form builder

These are free or low cost online systems that let you build simple 'free-form' forms. They include several field types and features, but they're not designed for complex applications. They're not conditional or responsive, they don't enable control of design, approval or publication, and they probably won't integrate with your other operation management systems. These form-builders may save some time but leave the full benefits of automated online forms out of reach. *This is your best option if a quick fix is a better fit for you than a longer-term solution.*

### 3. Use a high end, enterprise solution

These are comprehensive, feature-rich online solutions, best for organisations with enterprise-level budgets. Their impressive functions come with sizable price tags for initial purchase, additional forms, and enabling compliance functionality. You may also find the vendors are based overseas, so compliance with local regulations may not be possible nor hosting your data in Australia nor integration with legacy systems. *This is the option for you if money and time are not constraints.*

### 4. Use a feature-rich, cost-effective solution

These are intelligent, purpose-built form builders with built-in workflows and conditional logic, that are cost-effective to buy and easy for users to fill. The smartest ones can integrate with other business systems by API or via custom app for legacy systems. The most popular ones are designed, hosted and supported in Australia, so compliance with Australian regulations, data security and ongoing support are assured. *This is your choice if adaptability, value and peace of mind are key drivers.*



## How Formlify can help your NFP

Formlify is a purpose-built, smart web form builder from CIBIS, an Australian leader in business management software development for over two decades. Formlify was designed to deliver advanced enterprise-grade functionality for Australian organisations, without the enterprise price tag.

For NFPs, Formlify provides:

### Ease and control for your staff:

- Intuitive 'drag and drop' form creation, without the need for coding knowledge or help from IT
- Unlimited fields, statuses, logic flows and vertical layouts, including your corporate branding
- Advanced workflows linked to forms, giving you infinite control, variety and flexibility
- Conditional logic so staff see simpler forms, with only fields relevant to them
- Notifications sent based on form submission, state changes or workflow step.

### Convenience and confidence too:

- Forms that are attractive, intuitive, and easy and fast to fill
- Ability to partially fill forms via iOS or Android smart device, and return later to complete them
- Ability to add images, notes or signatures to your forms, so you can complete the picture
- Marking of sections as confidential or redacted (such as credit card details) so privacy is preserved and PII/PCI requirements are met
- Integration with your payment gateway making payments fast and easy.

### Control and peace of mind for your IT and management teams:

- Integration with your EDMS, other business systems including legacy systems
- Workflows that make compliance automatic and assured
- Value for money, with no limit to forms published; you are only charged for forms received
- Peace of mind knowing that design, hosting and support is by a trusted, long term, local provider.

If your NFP is still largely paper-based and you seek an advanced, flexible, cost-effective online form builder which will streamline operations now and adapt to change, contact [Formlify](https://www.formlify.com).



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