



The Non-Profit Budgeting Software Evaluation Checklist

Questions to ask when assessing whether a platform can support budgeting across your organisation.

Use this checklist to guide conversations with software providers and understand how each platform would support your organisation's existing budgeting, forecasting, and reporting requirements.

Budget collection

- Can budget holders enter figures through familiar, structured templates?
- Can the platform support budgeting across different sites, programmes, funds, departments, or entities?
- Can finance see which submissions are complete, outstanding, or awaiting review?
- Inputs and context
- Can comments and assumptions remain connected to the relevant figures?
- Can users access only the information and input areas relevant to their role?
- Can finance review changes, submissions, and versions clearly?

Consolidation and reporting

- Can submissions be combined without finance manually consolidating separate files?
- Can the platform report by the dimensions our organisation already uses?
- Can finance move from a consolidated figure to the supporting detail?

Data and forecasting

- Can the platform connect to actual data from our existing finance systems?
- Can the same structure support budgets, forecasts, and scenario updates?
- Can previous figures, assumptions, or submissions be carried forward where appropriate?

Implementation and support

- How will the platform be configured around our existing requirements?
- What information, decisions, and involvement will be needed from our team during implementation?
- What support will be available during implementation and after the platform goes live?



Considering budgeting software?

Use this checklist during your next software discussion, or speak to Solver UK about how Solver supports budgeting, forecasting, and reporting across non-profit organisations.

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