

NGO Case Sharing on

“Enterprise Resource Planning” (ERP) System

X

Digital Transformation



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Chief Executive, Hong Kong YWCA

**Chairperson, Standing Committee on Sector & Capacity Development,
Hong Kong Council of Social Services**

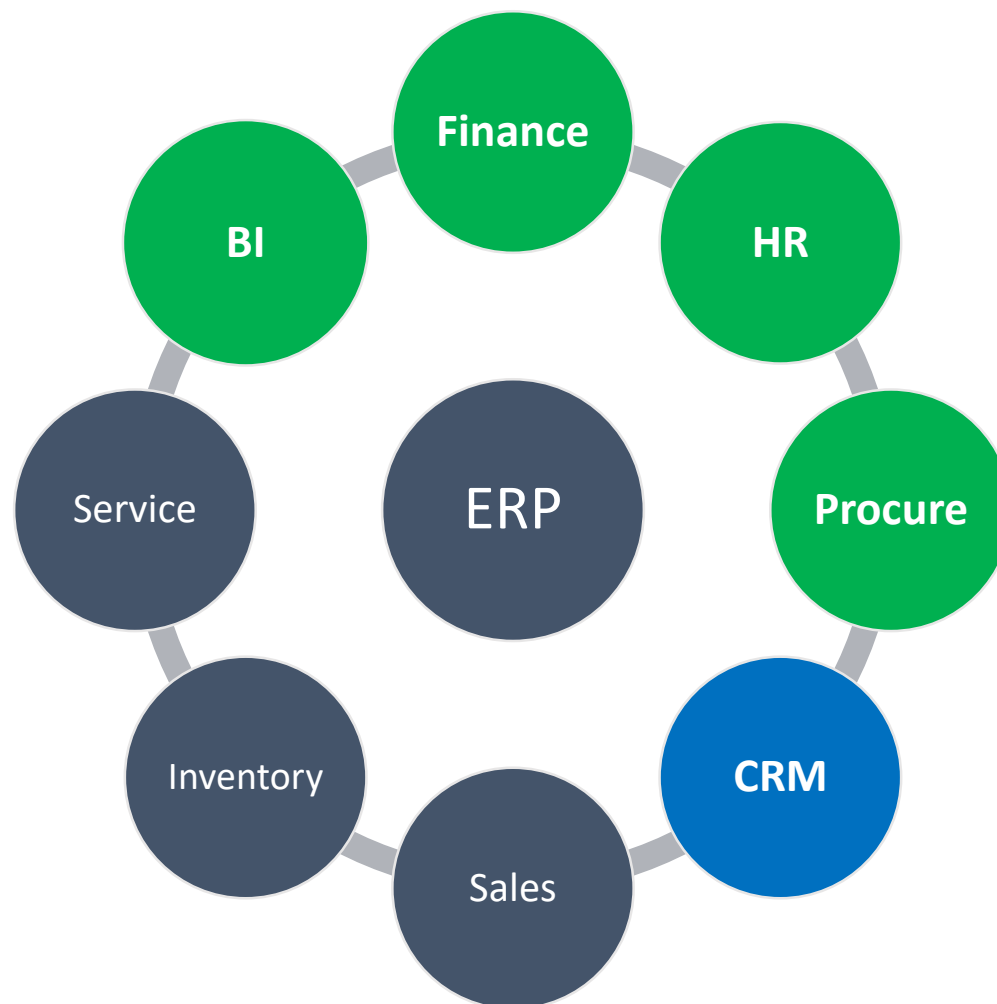
Project Objectives

1. Future Readiness & Digitalization
2. Productivity & Efficiency
3. Service Enhancement
4. Visibility & Timely Information
5. Proactive Planning

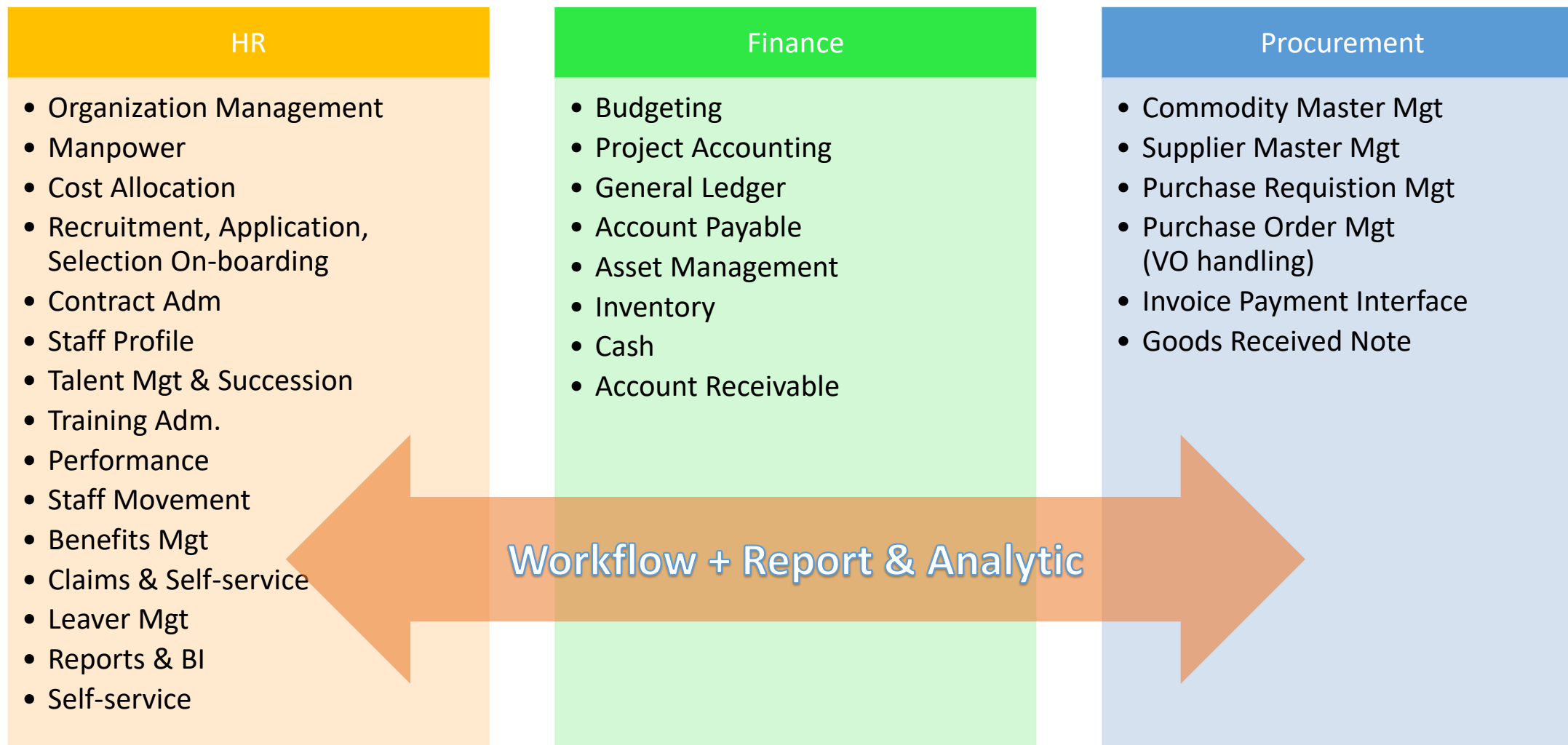
F U T U R



Scope



ERP System Scope



Precision in Achieving Organizational Mission

Robust Financial Management

- A. Centralization of financial data for greater clarity
- B. Ensured transparency in the utilization of funds

	C	D	E	F	G	H	I	J	K	L	M	N	P
2	Hong Kong Young Women's Christian Association												
3	CRGL02 Individual-IE Report												
4	Company's name	HKYWCA											
5	Actual date from	01/04/2023											
6	Actual date to	15/09/2023											
7	Book	AB											
19	Report print time	15/09/2023 11:57:05 AM											
21													
22		Account Code	Current Month HK\$	Actual Year-to-Date HK\$	Current Month Budget HK\$	Budget Year-to-Date HK\$	Budget Variance HK\$	Budget variance%	Last Year-to-Date HK\$				
23			(a)	(b)	(c)	(d)	(e) = (b) - (d)	(e) / (d)	(f)				
28	INCOME												
29	Total INCOME		0.00	XXXXX	XXXXX	XXXXX	XXXXX	XXX%	XXXXX				
31	EXPENSE												
69	Total EXPENSE		0.00	XXXXX	XXXXX	XXXXX	XXXXX	XXX%	XXXXX				
71	Surplus/(Deficit)		0.00	XXXXX	XXXXX	XXXXX	XXXXX	XXX%	XXXXX				

Precision in Achieving Organizational Mission

□ Data-driven Decisions

A. Shortened time to access organizational data

1 Month → Nearly Real Time after transaction input was approved

Precision in Achieving Organizational Mission

選擇活動的篩選條件

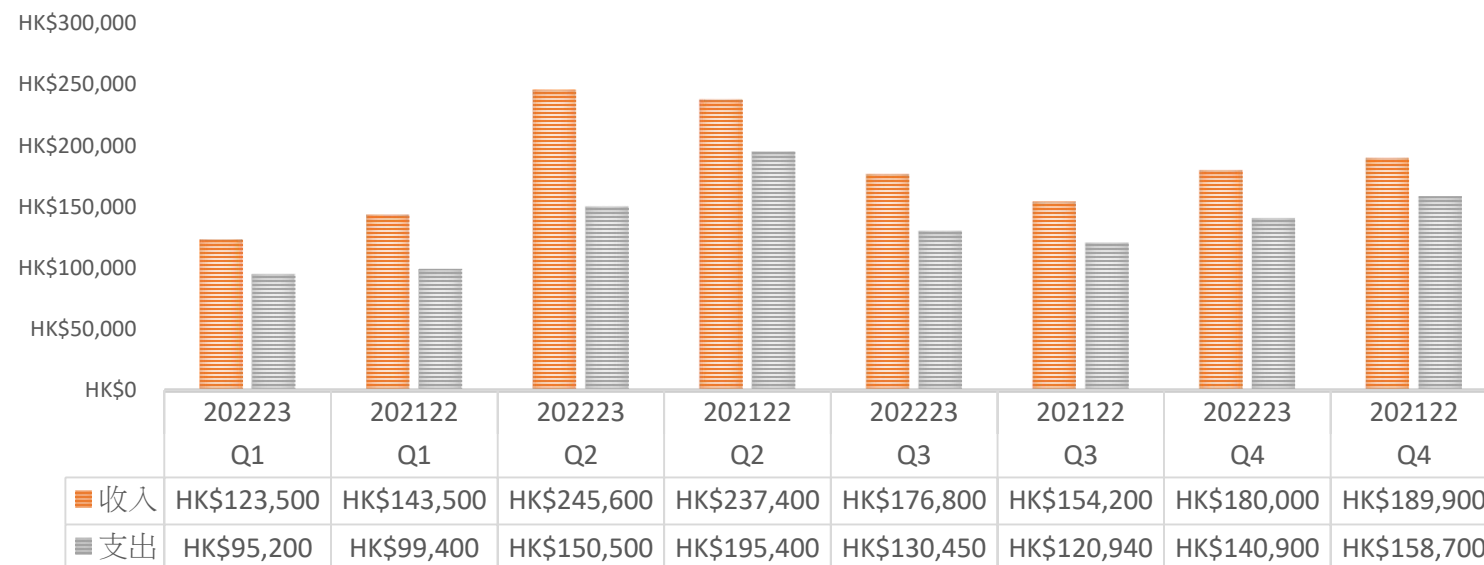
財政年度	服務單位	暑期活動	活動類型
<input checked="" type="checkbox"/> 2021-22 Q1	<input type="checkbox"/> ITST	<input type="checkbox"/> Y	<input checked="" type="checkbox"/> 文娛/康體/健康
<input checked="" type="checkbox"/> 2021-22 Q2	<input type="checkbox"/> ITTKO	<input checked="" type="checkbox"/> N	<input checked="" type="checkbox"/> 社區支援
<input checked="" type="checkbox"/> 2021-22 Q3	<input checked="" type="checkbox"/> ITTM		<input checked="" type="checkbox"/> 科技/成長發展
<input checked="" type="checkbox"/> 2021-22 Q4	<input type="checkbox"/> ITLC		<input type="checkbox"/> 家庭關係
<input checked="" type="checkbox"/> 2022-23 Q1	<input type="checkbox"/> ITBB		<input type="checkbox"/> 專題項目
<input checked="" type="checkbox"/> 2022-23 Q2	<input type="checkbox"/> ITLW		
<input checked="" type="checkbox"/> 2022-23 Q3	<input type="checkbox"/> ITSSP		
<input checked="" type="checkbox"/> 2022-23 Q4	<input type="checkbox"/> ITTSW		

Precision in Achieving Organizational Mission

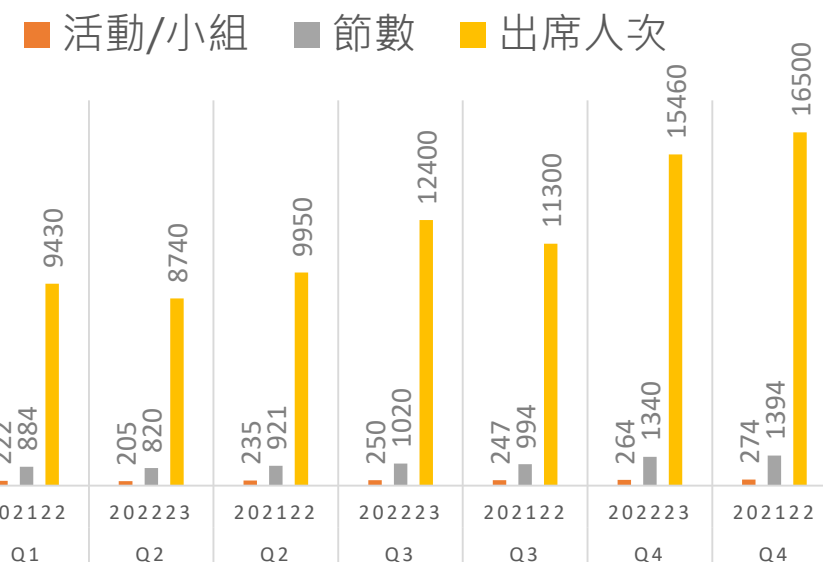
總收入: \$725,900 總支出: \$517,050 + \$208,850

活動小組: 929 節數: 4,050 人次: 45,720

收入及支出FO資料

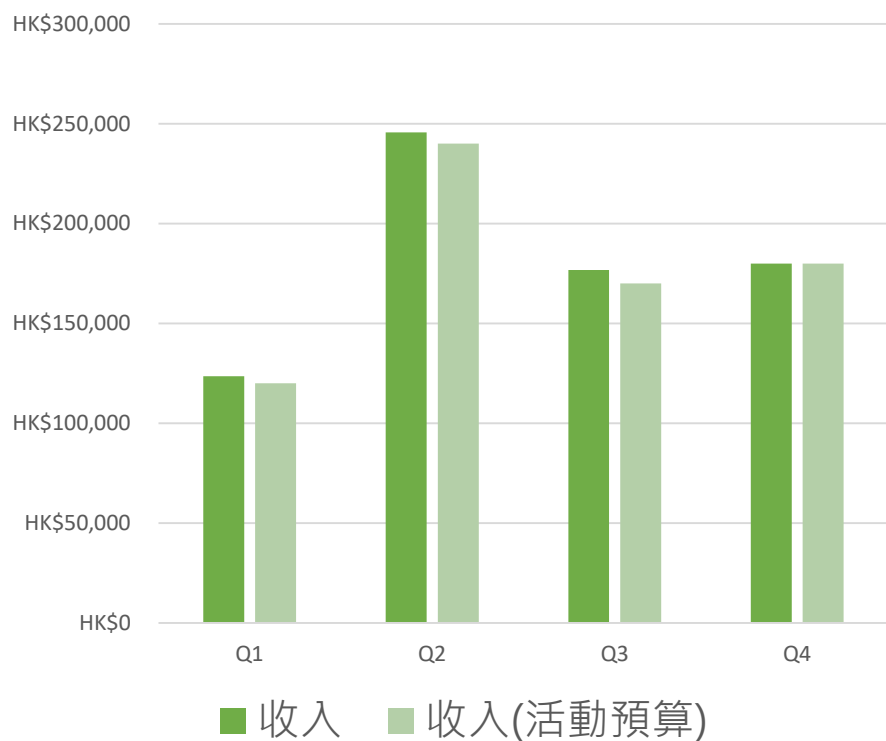


特別活動/小組CRM資料

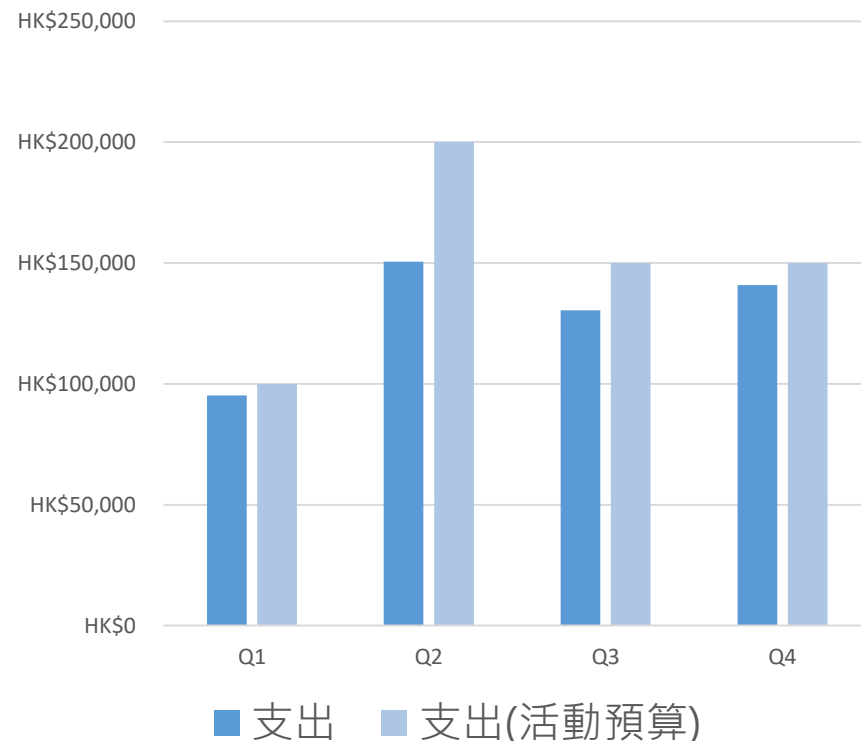


Precision in Achieving Organizational Mission

收入與預算對比

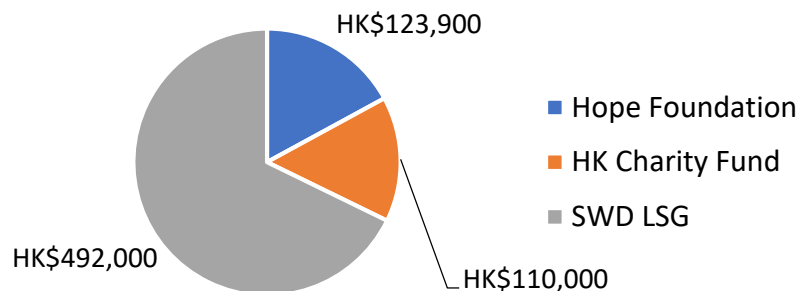


支出與預算對比

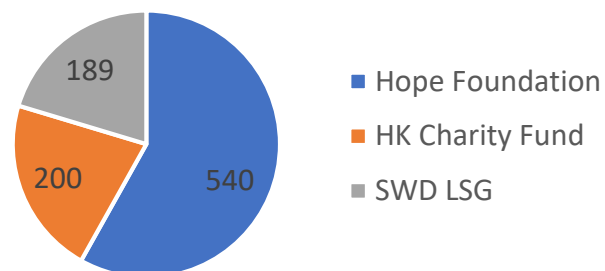


Precision in Achieving Organizational Mission

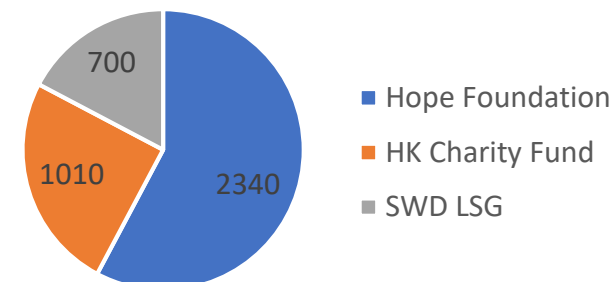
收入



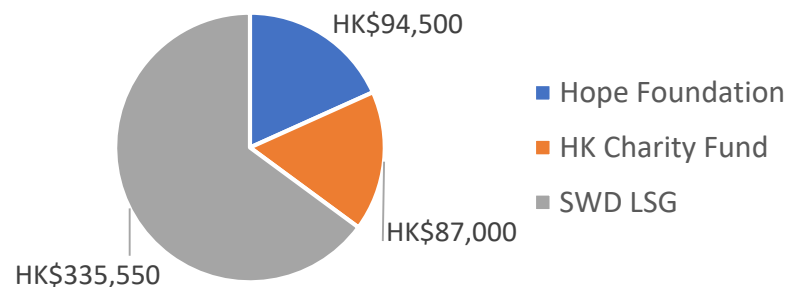
活動/小組數目



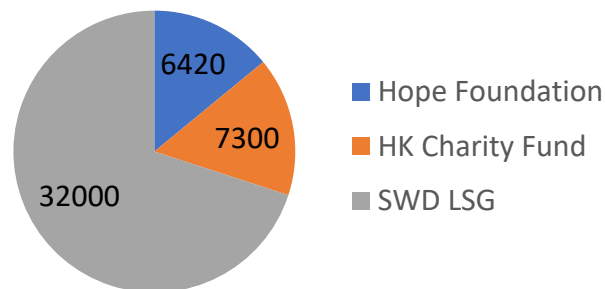
活動/小組節數



支出



活動/小組人次



Enhanced Governance & Trustworthy Compliance

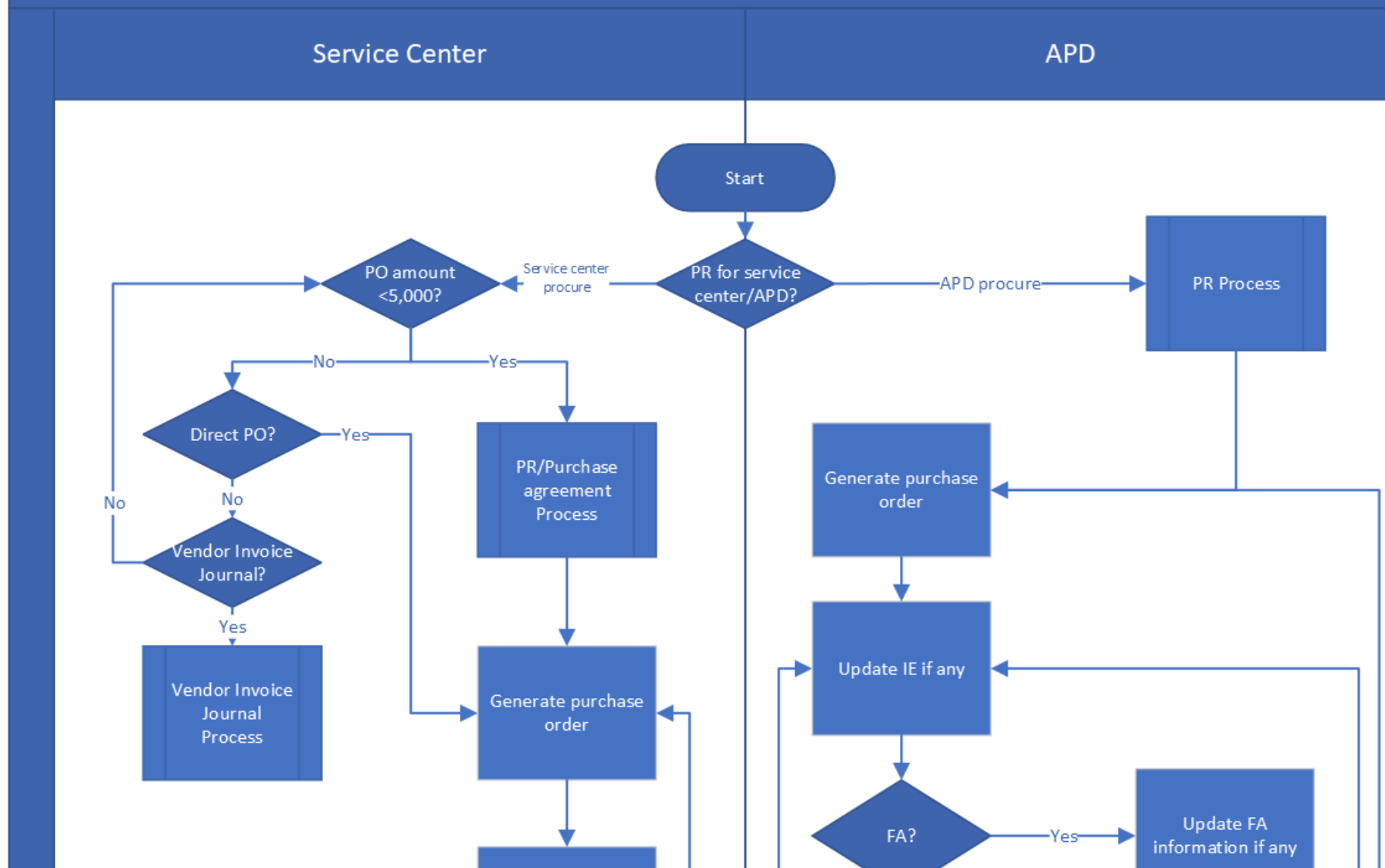
□ Streamlined Workflows

- A. Mechanisms in place to ensure that operations align with regulatory requirements. (like Lottery Funds, organization policy)

□ Efficient Compliance Management

- A. Automated checks and reminders
 - Budget checking to prevent over budget expenditure
 - Approval reminders for Management to review request
- B. Ensures timely fulfillment of funding criteria and grant requirements, building stakeholder trust
 - Facilitate financial audit process with centralized data and supporting documents

To-be Purchase order

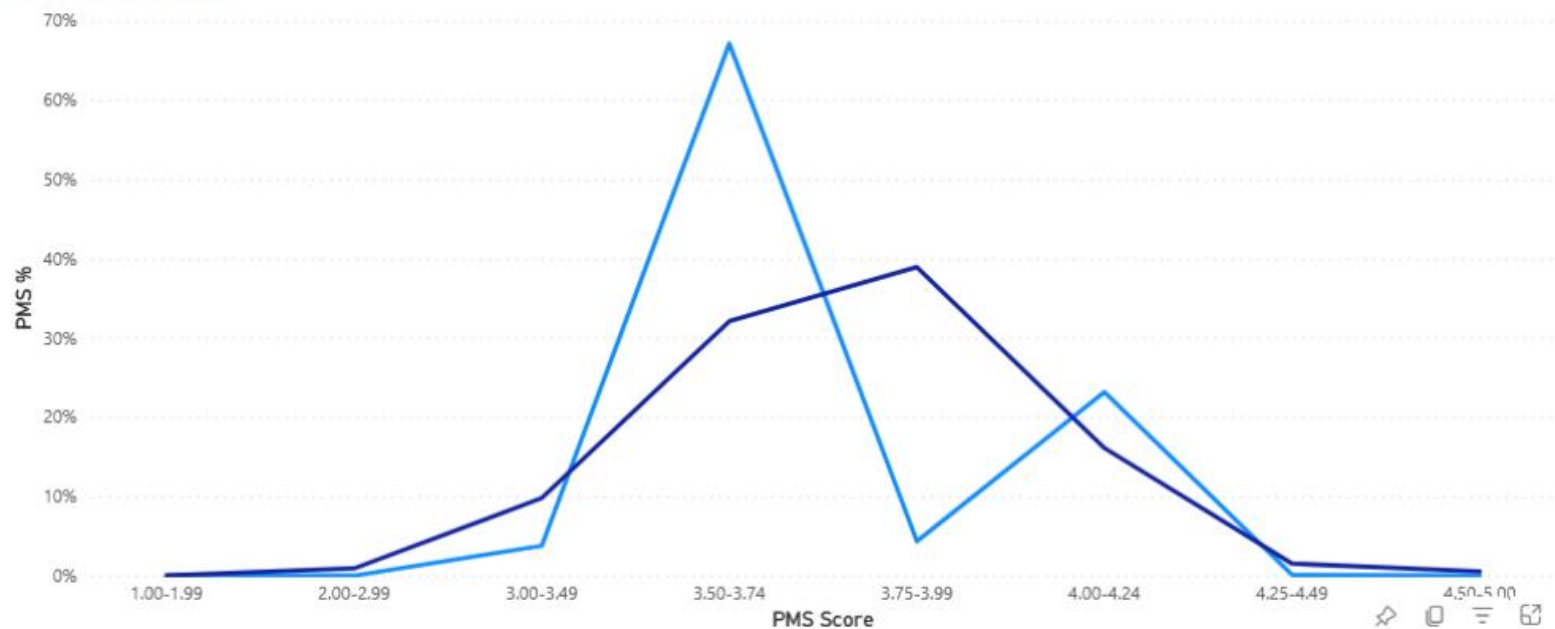


Holistic Talent Management

- Performance Monitoring & Enhancement:
 - A. Systematic tracking of employee performance metrics.
 - B. Identification of top talent and highlighting areas for improvement.

Distribution of PMS Rating by Year(s)

Year ● 2021 ● 2022



Year	2021		2022	
PMS Score	No.	PMS %	No.	PMS %
1.00-1.99	0	0.00%	0	0.00%
2.00-2.99	0	0.00%	12	0.91%
3.00-3.49	46	3.76%	129	9.79%
3.50-3.74	820	67.10%	423	32.09%
3.75-3.99	53	4.34%	513	38.92%
4.00-4.24	283	23.16%	212	16.08%
4.25-4.49	1	0.08%	20	1.52%
4.50-5.00	0	0.00%	7	0.53%
Total	1222	100.00%	1318	100.00%

Year

2021

2022

Termination Effective Date

2022/4/1

2023/10/8

Probation Completion Date

1981/4/5

2024/4/3

Dept Code

- 全編
- (空白)
- CAD
- CDCE
- CFSD
- ECED
- ESD
- SBDD
- Y_HOSPIT
- YM_CMMD
- YM_WAD
- YNC

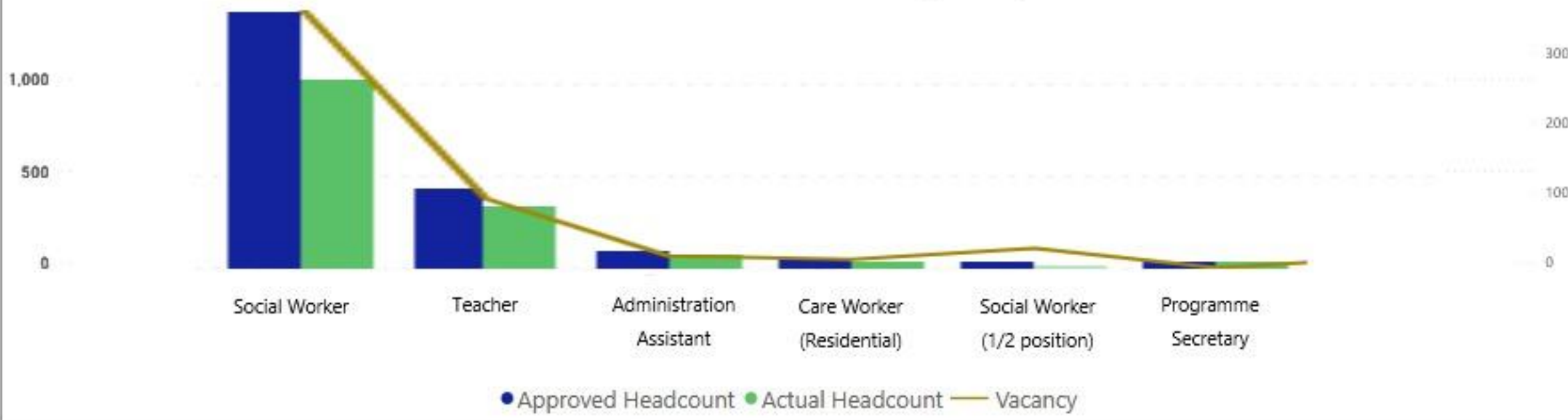
Unit Code

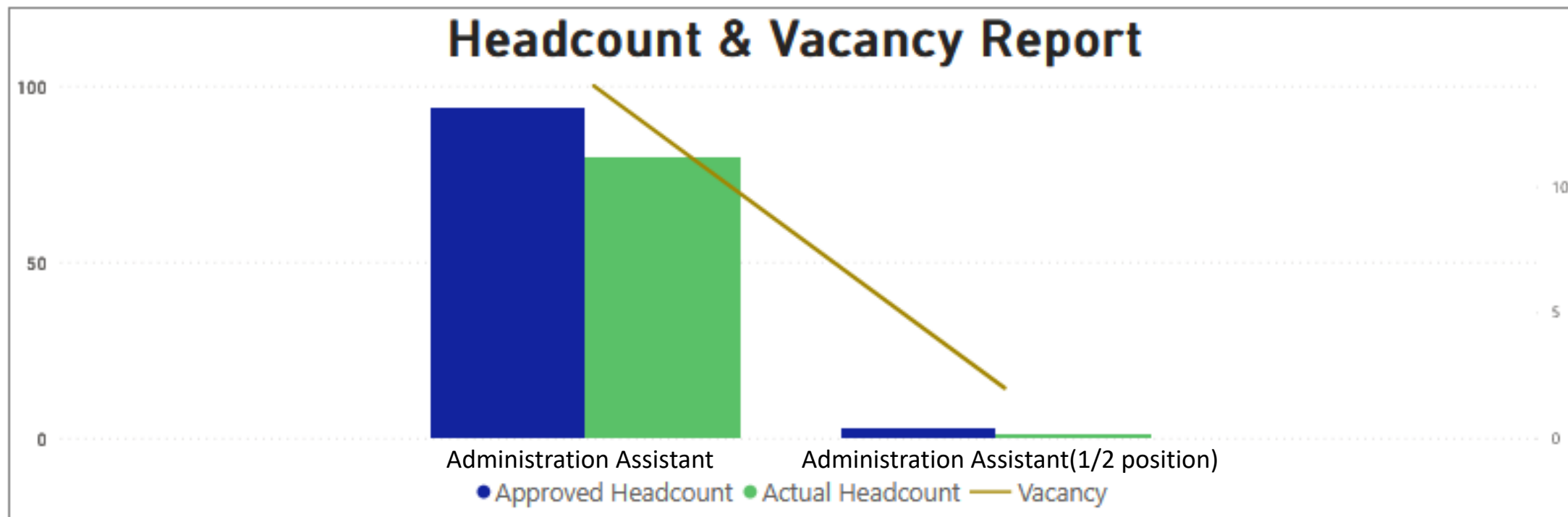
全編

Holistic Talent Management

- Talent Acquisition & Retention, Future-Ready Succession Planning:
 - A. Comprehensive view of staff vacancy rate, turnover rate, hiring trends.
 - B. Tools for identifying potential future leaders, fostering long-term talent development, identifying retention needs.
 - C. Assists in ensuring organizational continuity and seamlessly handling leadership transitions.

Headcount & Vacancy Report

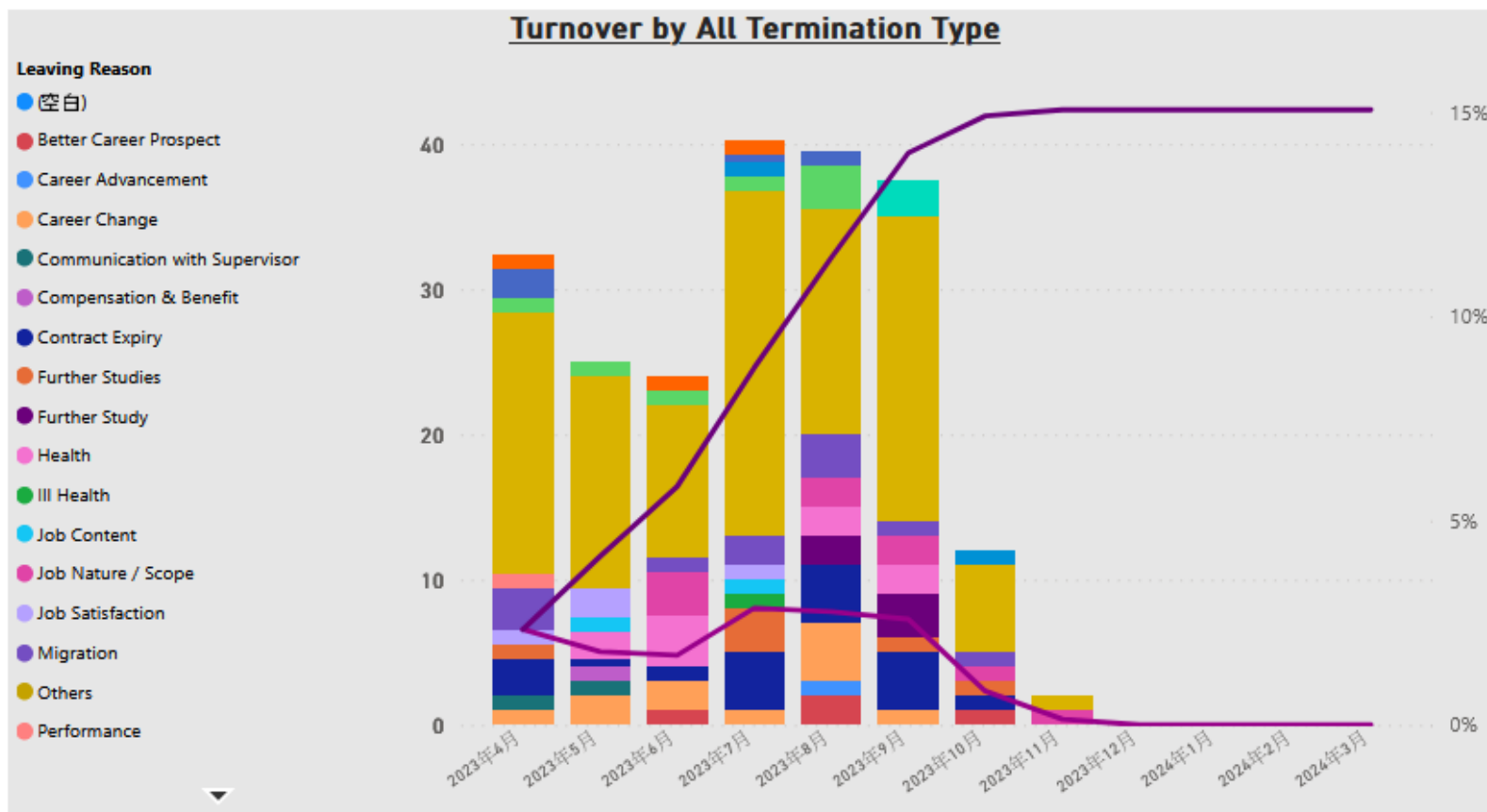




Vacancy List

Dept Code	Unit Code	Approved Grade Description	Approved Grade	Approved Headcount	Actual Headcount	Vacancy
CDCED	CECO	Administration Assistant 行政助理 I	G1	3.00	2.00	1.00
YNC	CERC	Administration Assistant 行政助理 I	G1	0.50	0.00	0.50
ESD	DHE	Administration Assistant 行政助理 I	G1	2.00	1.00	1.00
CFSD	FWC_KC	Administration Assistant 行政助理 I	G1	4.00	3.00	1.00
CFSD	FWC_TSW	Administration Assistant 行政助理 I	G1	2.50	0.00	2.50
ESD	HHKC	Administration Assistant 行政助理 I	G1	3.00	1.00	2.00
YNC	ITWD	Administration Assistant 行政助理 I	G1	2.00	1.00	1.00
CDCED	LK	Administration Assistant 行政助理 I	G1	5.00	4.00	1.00
ESD	MEEL	Administration Assistant 行政助理 I	G1	5.00	3.50	1.50
ESD	MEMY	Administration Assistant 行政助理 I	G1	2.50	2.00	0.50
ESD	SECP	Administration Assistant 行政助理 I	G1	2.00	1.00	1.00
YNC	SSW	Administration Assistant 行政助理 I	G1	4.00	2.00	2.00
ESD	YC_HMT	Administration Assistant 行政助理 I	G1	3.00	2.00	1.00
ESD	YC_STK	Administration Assistant 行政助理 I	G1	2.00	1.00	1.00
YNC	YCSRP	Administration Assistant 行政助理 I	G1	1.00	0.00	1.00

HRD 4 Turnover Report



1410.43

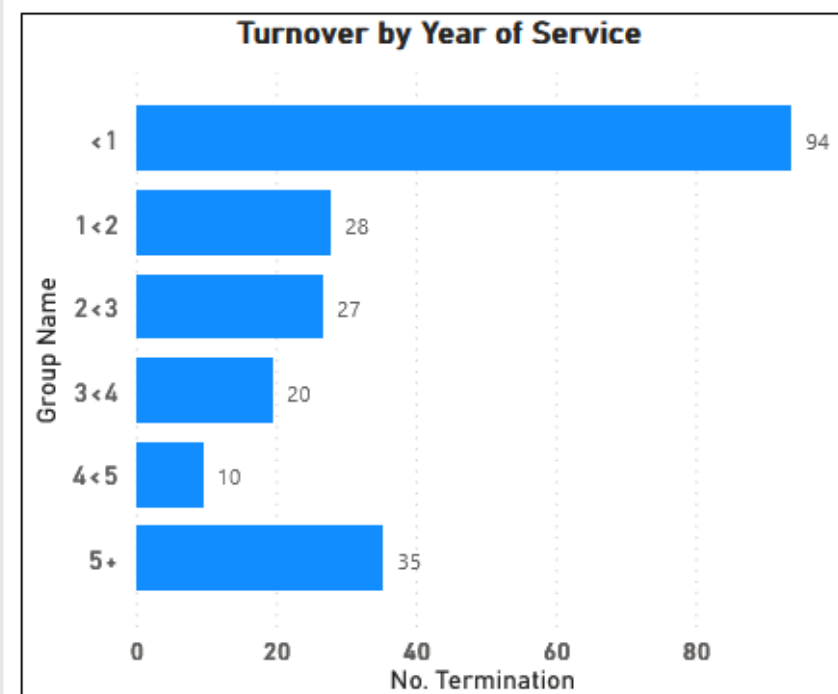
Headcount

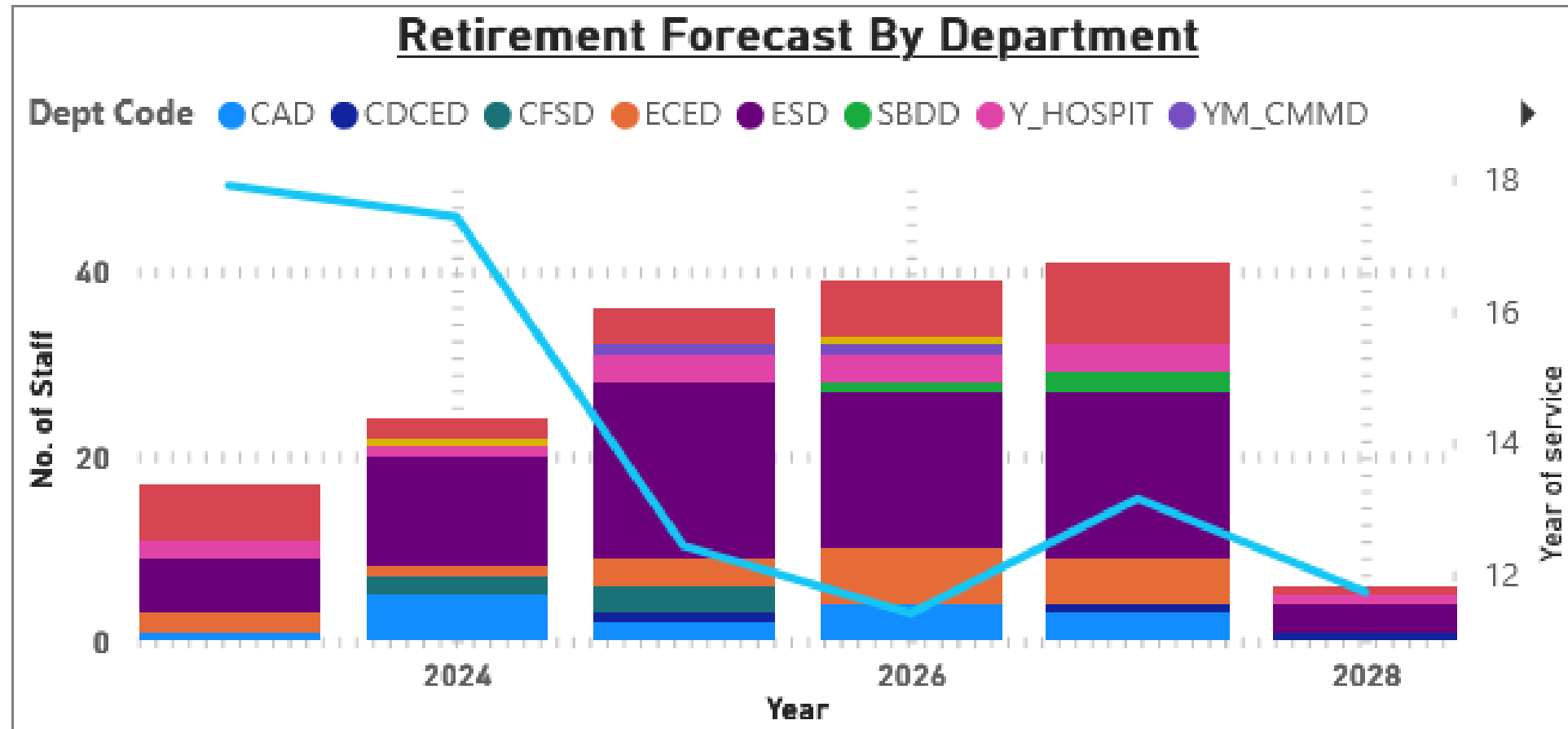
212.43

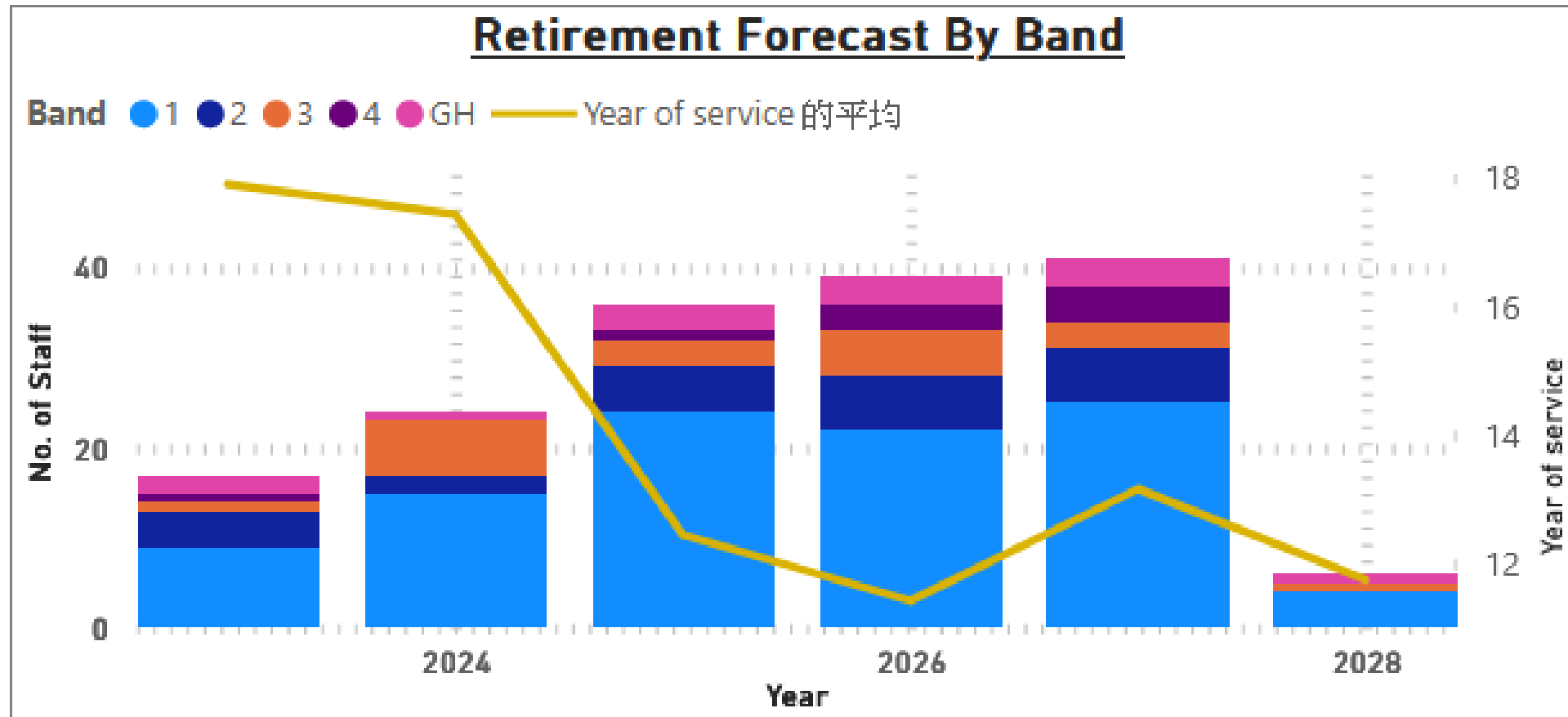
No. Termination

15.06%

Turnover Rate







Fight Path Analysis Summary

P
o
t
e
n
t
i
a
l

High

Medium

Low

PMS Score 0

1

3

3.5

4


5

 %
Passenger

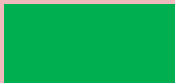
 %
Seed Corn

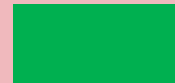
 %
Rising Star

 %
Silent Star

 %
Minimun
Player

 %
Solid Citizen

 %
Hidden Passenger

 %
Potential Passenger

Thank you



Q & A

