

Sage 500 ERP | Customer Success

United Way of Dallas: Giving More Efficiently With Sage 500 ERP

“One way that helps us all.” Fulfilling that promise has made United Way the largest nongovernmental funder of health and human services in America. Its Metropolitan Dallas chapter, established as the Community Chest in 1924, raises money for health and human services in a three-county area. The locally incorporated nonprofit is one of the top 15 in the nation in size.

United Way of Metropolitan Dallas (UWMD) raises and distributes charitable contributions for organizations as diverse as daycare centers, vocational training, the Boy Scouts and the Girl Scouts, emergency shelters for battered women and children, medical and dental treatment for the underprivileged, and programs for the blind and disabled. Administration costs are just 9 percent of the total funds collected, well within the Better Business Bureau guidelines for nonprofits.

Putting Systems Under Scrutiny

With 80+ employees, revenues topping \$50 million, and its own building in the works, United Way of Metropolitan Dallas rivals many mid-sized companies in complexity. Not only does it funnel donations to local nonprofits, but it also has a capital fund, conducts campaigns for several other counties and government employee groups, runs a foundation to offset administrative costs, collects funds for various national campaigns, and distributes designated donations to target groups. Each activity has its own books and operates much like a separate company.

Meticulous outside audits examine United Way’s fiscal integrity (and frugality) each year. So IT costs must be kept to the barest minimum. This explains why UWMD performed such a thorough search for a new business system when it switched from a mainframe to a Windows®-based client/server architecture. The new package would have to bring a hefty return on investment in improved efficiencies to justify the purchase price.

Frugal and Functional

“We really did our homework, measuring competing software packages against needs matrices,” says Dan Alaniz, vice president of information systems at UWMD. “Sage 500 ERP* was the right choice. It allows us to be about 40 percent more efficient and has made an enormous difference in reducing administrative and maintenance costs.”

*Sage 500 ERP was named Sage ERP MAS 500 when United Way of Metropolitan Dallas initially implemented this solution. The product names have been updated in this case study to reflect current naming.

Customer

United Way of Metropolitan Dallas

Industry

Nonprofit agency

Location

Dallas, Texas

Number of Locations

One

Number of Employees

82

System

Sage 500 ERP

- Accounts Payable
- Cash Management
- Customizer
- eExecutive
- General Ledger



Challenge

To find an advanced business system that can manage the complex operational challenges of a \$50 million nonprofit organization while providing a healthy return on investment.

Solution

Sage 500 ERP financial modules.

Results

40 percent more efficient; huge savings in administration and IT costs; exceptional reporting and instant data access; reliable system maintenance and backup; streamlined Internet pledging and reporting.

Sage 500 ERP manages all of UWMD's accounts payable and other general ledger functions. It cuts checks to scores of external vendors involved in campaigns, tracks pledge fulfillments, and makes sure that member agencies receive promised funds on time. A customized application developed by the reseller provides managers with the ability to electronically approve checks before issuing.

UWMD could even be called an e-nonprofit with its new system. Donors can pledge online through the organization's website and secure socket connection. Agencies tasked with reporting to UWMD on a quarterly basis can do so using a specialized application over the Internet, saving a lot of paperwork for time-strapped agencies.

The consultant fees United Way used to spend for special reports are now a thing of the past. "Digging numbers out of our mainframe system was tedious and difficult, requiring predefined queries," says Alaniz. "Sage 500 ERP offers us a whole new world of access to data. We can put our hands on information whenever and however we like. This gives us confidence in the accuracy of our data, especially when it's time for an audit."

Alaniz also appreciates the built-in maintenance features of Sage 500 ERP. "Cutting-edge software like this leverages the capabilities of a SQL database. The system does a lot of its own maintenance and backups. Our users feel very comfortable with its stability and security, knowing that data will not be permanently lost if the system happens to go down."

United Way subscribes to the Sage Silver Support program for technical support. "They have always gotten back to us very quickly," Alaniz notes. "It's worth every penny." He also turns to his reseller frequently for help, whom he praises for expert assistance and outstanding responsiveness.

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**Dan Alaniz
Vice President of
Information Systems
UWMD**

"Very few of the dollars we raise remain here at United Way," Alaniz comments. "Even fewer stay now because of the enhanced efficiencies we've achieved with Sage 500 ERP. This means we can be better stewards of the funds entrusted to us by our community's contributors."

About Sage

Sage North America is part of The Sage Group plc, a leading global supplier of business management software and services. At Sage, we live and breathe business every day. We are passionate about helping our customers achieve their ambitions. Our range of business software and services is continually evolving as we innovate to answer our customers' needs. Our solutions support accounting, operations, customer relationship management, human resources, time tracking, merchant services, and the specialized needs of the construction, distribution, manufacturing, nonprofit, and real estate industries. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs 12,300 people and supports more than 6 million customers worldwide. For more information, please visit the website at www.SageNorthAmerica.com or call 866-996-7243. Follow Sage North America on Facebook at: <http://www.facebook.com/SageNorthAmerica> and Twitter at: <http://twitter.com/#!/sagenamerica>.