CUSTOMER SUCCESS

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

"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 non-profit 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 nine percent of the total funds collected, well within the Better Business Bureau guidelines for non-profits.

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 non-profits, 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 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 MAS 500 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."

Customer:

United Way of Metropolitan Dallas

Industry:

Non-profit agency

Location:

Dallas, Texas

Number of Locations

One

Number of Employees

82

System:

Sage MAS 500

- 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 non-profit organization while providing a healthy return on investment.

SOLUTION

Sage MAS 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 back up; streamlined Internet pledging and reporting.

Sage MAS 500 manages all of United Way'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 Web site 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 MAS 500 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 MAS 500. "Cutting-edge software like this leverages the capabilities of a SQL database. The system does a lot of its own maintenance and back ups. 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 Software 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.

"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 MAS 500. This means we can be better stewards of the funds entrusted to us by our community's contributors."

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ABOUT SAGE SOFTWARE

Sage Software supports the needs, challenges, and dreams of more than 2.7 million small and midsized business customers in North America through easy-to-use, scalable, and customizable software and services. Our products help manage a complete range of business functions including: accounting, operations, customer relationship management, human resources, time tracking, merchant services and the specialized needs of the construction, distribution, healthcare, manufacturing, nonprofit, and real estate industries.

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