



Ontario March of Dimes finds competitive edge with Microsoft Business Solutions-Navision

Overview

Country: Canada

Industry: Not-for-profit

Customer Profile

Founded in 1951, Ontario March of Dimes is a non-profit agency that delivers a wide range of services to improve the lives of people with physical disabilities

Business Situation

Ontario March of Dimes needed to reduce clerical costs and improve the efficiency of its financial and case tracking systems to get the most from its budget in an era of shrinking government funding

Solution

Working with technology partner Altus Dynamics, Ontario March of Dimes deployed Microsoft Business Solutions-Navision to make its financial and case management systems more efficient

Benefits

- Reduced month/year-end closing
- Increased staff efficiency
- Quicker response to funding bids
- ERP Solution for the agency
- Fully integrated systems/services

“There’s a lot of financial pressure on non-profits today because government funding is a shrinking pot. In competitive bids for grant money, Navision gives us the tools to hit the ground running.”

Deborah Pal, provincial research coordinator, Ontario March of Dimes

Ontario March of Dimes (OMOD) is one of the largest non-profit rehabilitation agencies in Ontario, providing services to enhance the lives of people with physical disabilities. Based in Toronto, OMOD employs over 1,450 staff and manages annual revenues of over \$74 million. The charity needed to reduce costs and improve efficiencies to get the most from its budget in an era of shrinking government funding. In tandem with consolidating its operating systems on the Microsoft platform, OMOD deployed Microsoft Business Solutions-Navision, as its case management and financial tracking application. The solution has helped OMOD streamline processes, reducing month-end closing time from 20 business days to five, and year-end closing time from three months to one. The application has also helped OMOD respond quickly to competitive grant proposals, winning the agency more project funding.



About Altus Dynamics

Altus Dynamics is a leading provider of financial and operational software and services designed specifically for non-profit, education and government organizations.

Altus Dynamics financial and operational applications are powered by Microsoft Dynamics® NAV - a complete and integrated business application that has been implemented by over 70,000 organizations worldwide. Altus is a Gold Certified Microsoft partner whose success is grounded in an authentic feeling of passion for nonprofits.

Altus Dynamic's solutions include Financials, HRIS, Payroll, Contact & Volunteer Management, and Employee Self Service Portals as well as a range of consulting, analytical, and training services.

Situation

Ontario March of Dimes (OMOD) is one of the largest charitable rehabilitation organizations in Ontario. The non-profit agency provides a wide range of services across the province to enhance the independence and community participation of people with physical disabilities. Beginning in 1951 with a volunteer network of Canadian mothers who canvassed for dimes to finance polio research, OMOD has grown into a large organization with annual revenues of over \$74 million, funding services to almost 25,000 people.

OMOD employs more than 1,450 full and part-time staff, and has nine regions and over 70 service locations across Ontario. When the organization was consolidating its operating platform from a mix of Novell and Microsoft® Windows NT® to Microsoft Windows® 2000 operating system, it realized that it needed an integrated application to track its case management and financial systems.

"We had two software programs that didn't talk to each other – our finance system was text-based and ran on Unix, and we were using Visual Fox Pro for case tracking," says Deborah Pal, provincial research coordinator, Ontario March of Dimes. "We wanted something that was Windows-based and could integrate both those major applications."

OMOD's legacy systems were outdated and ineffective. The charity was using a journal-based financial management application, and its case management system only supported three of the 12 major programs in the organization. As well, because each of the three programs resided on separate databases, there was an overload of duplicated consumer information.

With its original system, OMOD staff spent most of their time performing clerical duties such as preparing spreadsheets and importing that data into the financial tracking system. Duplication of effort was costing the agency in employee time, with too much focus on the clerical side and not enough on the analytical side of reporting requirements. As well, temporary staff needed to be hired at month and year-end to help handle the workload.

Case management was suffering as a result of all the time being spent preparing financial reports. Often, OMOD was forced to delay submitting case reports to its service customers due to the amount of effort required in its financial reporting.

Solution

The Microsoft technology partner working with OMOD on the server upgrade recommended Navision to help make the agency's financial and case management systems more efficient. After reviewing other products from ACCPAC to Great Plains, OMOD chose Microsoft Business Solutions-Navision because it was the only solution that satisfied both needs.

"There really is nothing else on the market that would allow them to do what they needed to do in as rapid and as integrated an environment as Microsoft Business Solutions," says James Faw, partner, Altus Dynamics. "With Microsoft Business Solutions-Navision, they have one database solution for their entire operation, including financial and service delivery."

OMOD deployed Microsoft Business Solutions-Navision in tandem with its scheduled server upgrades, going live in April 2002 and completing the implementation in September 2002. The integrated operability of the Microsoft server system has allowed

the organization to automate all its programs on a single platform.

As well, OMOD standardized its entire billing function with Microsoft Business Solutions-Navision. The organization manages eight different regions and 1,450 employees, many of whom enter times into the billing system. Prior to deploying Microsoft Business Solutions, this was a time-consuming and inconsistent process.

“We’re finding a lot of unexpected benefits because of the flexibility of Navision, and its ability to integrate with other programs we have in place,” says Pal. “We’re able to track our key indicators much more efficiently, which is critical given what’s happening in the non-profit sector. So while we may have focused on our service delivery and financial tracking, now we’re also looking at other ways Microsoft Business Solutions software can help increase our internal efficiency.”

Benefits

Consolidating its operating systems on the Microsoft platform has given OMOD a more stable, secure IT environment; deploying Microsoft Business Solutions for Financial Management has helped the organization streamline its financial and case management processes, and at a more reasonable cost.

“We had an approved budget for the financial implementation, and pretty early in the process OMOD realized Microsoft Business Solutions could also help them replace all the silos of information around their service delivery,” says Faw. “So with the same budget they were able to get an application that runs their entire business.”

Reducing the Clerical Workload

With Microsoft Business Solutions, OMOD has the benefits of a fully integrated financial and case tracking system, which has

dramatically decreased the amount of clerical work needed to do month-end and year-end reports. Previously, it took 20 days to prepare for month-end and three months to prepare for year-end. Using Microsoft Business Solutions software, OMOD administration staff is able to compile month-end reports in just five days, and prepare for year-end in one month.

As well, Microsoft Business Solutions has consolidated OMOD’s consumer data on a single platform, which has eliminated duplication and resulted in consistent case reporting and billing policies across its numerous programs and regions. OMOD’s funders now receive timely service reports, which have increased their satisfaction with the organization.

Deploying Microsoft Business Solutions has made financial and case management processes at OMOD more efficient, which has decreased costs by both eliminating redundant clerical tasks, and reducing the number of temporary staff needed to help manage the reporting workload.

“There’s a lot of financial pressure on non-profits today because government funding is a shrinking pot. The more efficient you can be, the less it costs you to deliver necessary services to consumers,” says Pal. “Now we have the tools in place to be more efficient, and to respond much quicker as new programming monies become available. In competitive bids for funding, Navision lets us hit the ground running.”

Flexibility for the Future

In 2005, OMOD is planning to upgrade to the latest version of Microsoft Business Solutions-Navision and extend the application to include its human resources, payroll, business analytics, grant management and constituent management systems.

Altus Dynamics

For more information about Altus Dynamics solutions, contact an Altus account representative. In the United States and Canada, call toll-free 866.878.5552. Visit us on the website at www.altusdynamics.com.

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“Navision showed us clear benefits because of its ability to be flexible and easily customizable,” says Pal. “One of the key features that attracted us was the fact that the application is modular – you can add functionality as you go without re-implementing.”

The software’s integration with Microsoft Office System means OMOD will have a more intuitive, familiar interface fronting all its business processes. Accordingly, training costs will be minimal as employees and new staff will already understand how to use the applications.

“We’ve found it easy to cross-train with Microsoft Business Solutions because the interface is simple and most users are already familiar with Windows,” says Pal. “With other products, you have to take a full-blown course to learn how to use it. But Navision uses standard Microsoft Windows features, and everything is integrated directly within the operating system so when we hire new staff, they can start using the applications right away.”

Microsoft Business Solutions

Microsoft Business Solutions offers integrated business applications and services that allow small and mid-sized organizations and divisions of large enterprises to connect employees, customers, and suppliers for improved efficiency. The financial management, customer relationship management, supply chain management, and analytics applications work with Microsoft products such as Microsoft Office and Windows to streamline processes across an entire organization, giving businesses insight to respond rapidly, plan strategically, and execute quickly. Microsoft Business Solutions are delivered through a worldwide network of channel partners that provide specialized services and local support tailored to a company’s needs.

For more information about Microsoft Business Solutions, go to: www.microsoft.com/businesssolutions/

Hardware

- Microsoft Windows 2000
- Microsoft Business Solutions-Navision

Partners

- Altus Dynamics
- Serenic Software Inc.