CASE STUDY

sage Intacct

Keeping Pace with High Growth Demands

Meals on Wheels America

Challenges

Keeping Pace with High Growth Demands

Meals on Wheels America is the leadership organization supporting the more than 5,000 community-based programs across the country that are dedicated to addressing senior isolation and hunger. The nonprofit's challenge is to prepare the network that already serves 2.4 million Americans each year to meet the increasing demands of a rapidly growing senior population.

Meals on Wheels America needed modern financial management to keep up, as Don Miller recognized when he joined the nonprofit as chief financial and administrative officer in 2013. "I walked into an organization that was running on QuickBooks and Excel and was very limited by its systems, especially when it came to managing grants," Miller said. "I knew we needed an accounting system that could help us grow." As it was, Meals on Wheels America faced tons of time-consuming manual accounting work, and relied on Excel to manage grant funding—which was especially problematic with restricted grants from funders that specify a particular use. Reporting was severely limited, and travel and expense accounting was still done on paper.

Miller led an evaluation of leading financial systems, looking for a robust solution that could integrate with other applications and run in the cloud to avoid the high costs and complexity of on-premises software. "We looked at almost everything under the sun, and for us Sage Intacct provided the best combination of powerful functionality and user-friendliness," Miller said. "It also gave us the best value as far as functionality vs. cost."

Solutions

Real-Time Data for Visibility and Collaboration

Sage Intacct proved to be the ideal solution for financials, reporting, time and expense, and especially grants from corporate, philanthropic, and federal funders. For the first time, Meals on Wheels America has real-time visibility into expenses booked against a particular grant. That enables the finance team to quickly identify issues and work with a department head or project lead to align budget and actuals. The nonprofit is also better able to ensure that restricted grants are applied to their intended use, improving accountability with funders.

MEALS on WHEELS AMERICA

Company Overview

Meals on Wheels America is the oldest and largest national organization supporting the more than 5,000 community-based senior nutrition programs across the country that are dedicated to addressing senior hunger and isolation. This network exists in virtually every community in America and, along with more than two million volunteers, delivers the nutritious meals, friendly visits and safety checks that enable America's seniors to live nourished lives with independence and dignity.

Executive Summary

Previous Software:

- Intuit QuickBooks

Results with Sage Intacct:

- Accelerated monthly close from three to two weeks
- Scaled efficiently with 20% growth, while avoiding the cost of at least one FTE
- Cut audit preparation time by 60%
- Sped departmental planning process by 4X
- Software paid for itself in 2 months based on business value

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KEEPING PACE WITH HIGH GROWTH DEMANDS

The organization's grant management and other accounting practices have been dramatically improved by Sage Intacct's dimensions capabilities—which allow them to tag transactions and funds across multiple dimensions to add business context. Users can easily apply filters to view data any way that's needed—by project, department, funder, and more—to improve transparency and forecasting across the organization. Sage Intacct dashboards deliver key metrics to stakeholders, while "extremely powerful" reporting gives users flexibility to drill into information. "We've improved real-time visibility into our performance," Miller said. "We're now course correcting all the time and we're only able to do that because of the fact that we're on Sage Intacct."

Compared to siloed systems of the past, Meals on Wheels America has taken advantage of Sage Intacct's open integration capacity to connect it to CRM, fundraising, association management, and other applications. That's given the organization "one source of financial truth" and streamlines what were previously disconnected processes.

Results

Efficiency and Flexibility for a Changing Future

Meals on Wheels America is running significantly faster on Sage Intacct. Process efficiency has soared by eliminating manual Excel work, cutting a week from the monthly close, and reducing field work for audit preparation by 60%. The efficiency gain has avoided the cost of at least one full-time employee. Moreover, it means the finance team has more time for forward-looking strategic work and collaborating with department heads. "We've become business partners instead of bean counters," Miller said.

Greater speed and visibility are vital amid rapid growth for Meals on Wheels America. The nonprofit is able to channel resources into fulfilling its social mission of bettering the lives of millions of seniors in need, even as it faces funding uncertainty at the federal level. "We've grown nearly 20% every year since 2013, and the complexity of our business has increased as well," Miller said. "Fortunately, Sage Intacct has supported this growth by easily scaling, without forcing us to add headcount."

With a flexible accounting platform, the organization is poised for further expansion. For instance, it's aligning its services with the senior healthcare industry's move from acute care into more community-based settings. Partnering with insurance companies, hospital systems, and other healthcare providers introduces new complexity and compliance requirements. "I'm confident that Sage Intacct is going to be able to support us as we go in a completely different direction," Miller said. "It's good to have a system where I don't have to worry about strategy getting ahead of the infrastructure."

> *"For me, the best things about Sage Intacct are that it's easy, it's powerful, it's cost-effective and the reporting is really flexible. It gives us all the information we need to manage the business effectively."*

Don Miller, Chief Financial and Administrative Officer, Meals on Wheels America

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