Seattle Indian Health Board Deploys Sage Intacct to Gain Transparency, Accuracy and Efficiency

CASE STUDY

armanino

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-Ben Luety

Challenge

Founded in 1970, the Seattle Indian Health Board (SIHB) is a $20 million Federally Qualified Health Center (FQHC) providing community health care and social services to urban American Indians and Alaskan Natives in the greater Seattle/King County area of Washington state. With 175 employees, the nonprofit delivers medical, dental, pharmacy, chemical dependency, mental health, and community outreach services centered around Native traditional health to over 10,000 people each year.

As a nonprofit 501(c)(3) organization, SIHB relies on as many as 60 grants per year to help fund total operating cost. "Often fulltime employees (FTEs) are allocated across a number of different grants," says Ben Luety, chief financial officer at SIHB. "This creates a need to capture and report on detailed data correctly so that we can track costs back to the appropriate funding source."

Before Luety joined SIHB, the nonprofit had moved from an older accounting software package that was no longer supported or being updated to a newer system. However, Luety found the new accounting software to be extremely complex and difficult to use effectively. It also lacked the scalability and robust reporting capabilities that Luety knew the organization needed.

Solution

In short order, Luety decided to replace the failing accounting software. He narrowed down the choices for a new cloud-based accounting system to two vendors. After a side-by-side comparison, SIHB chose Sage Intacct for its ease of use, transparency and robust dashboard and reporting capabilities. Luety was also impressed that Sage Intacct is recommended by the American Institute of Certified Public Accountants (AICPA).

SIHB decided to work with Armanino LLP, an end-to-end Sage Intacct implementation, customization and integration consulting provider, to deploy the new software. The largest independent accounting and business consulting firm in California, Armanino is also Sage Intacct's largest certified value-added reseller (VAR) partner for software, integration consulting and software consulting.

Armanino helped SIHB meet an aggressive deadline to deploy its new financial system in just four months. "I've been part of other software implementations throughout my career," says Luety. "Deploying a system like this in four months' time, including migrating our data from the previous system, is unheard of."

Terry Woodland, controller at SIHB, agrees and says that she appreciated the support, guidance and training that Armanino provided throughout the project. "The consultants from Armanino were very patient and responsive to our needs," she says. "While we knew what we needed

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to accomplish, we really benefitted from their knowledge of the Sage Intacct software and extensive experience with nonprofit organizations."

Results

With Sage Intacct, the SIHB team now has the accuracy, efficiency, transparency and scalability they need to better manage the nonprofit and make informed decisions. "Sage Intacct is helping us be more successful because it puts data at the fingertips of our division heads," says Luety. "With dashboards and drill-downs into actuals, they have the full transparency they need to run their part of the organization like an actual business."

According to Woodland, before Sage Intacct, it would take a week to find the answer to a question posed to her by the CEO. "Now, our CEO doesn't even have to ask me questions because she already has the information on her Sage Intacct dashboard," she says. Adds Luety, "My role is to look out the front windshield to see what is coming and prepare for it. Sage Intacct gives me the insight that I need to understand what we have to be doing in the upcoming months."

Another benefit SIHB is seeing with its new financial system is the ability to easily and quickly import data into Sage Intacct from other systems. "Importing information saves us a significant amount of time, both in getting the data into the system and managing it once it's in the system," says Woodland. "And it improves accuracy of the data because no one has to manually re-enter it."

Neither Woodland nor Luety can imagine their day without Sage Intacct. "It's made my life much easier," says Luety. Woodland agrees, "I don't know how I could get my job done the way it needs to be done without it.

Next Steps

Next up for SIHB is to connect the organization's cloud-based payroll system and with Sage Intacct directly to eliminate having to prepare and import the data. The longer-term goal is to align all of SIHB's systems to feed into the new financial system for maximum accuracy and efficiency.

When asked what future-looking advice he would give other nonprofit organizations, Luety recommends CFOs keep abreast of and curious about new software for finance and accounting. "Many CFOs are failing their organizations because they are still using old software. It's like relying on a stone tablet and chisel," says Luety. "There is always a better way, and CFOs need to be continually asking that question about every process."

About Armanino

Armanino provides an integrated set of accounting services—audit, tax, consulting and technology solutions—to a wide range of organizations operating both in the US and globally. You can count on Armanino to think strategically, to provide the sound insights that lead to positive action. We address not just your compliance issues, but your underlying business challenges, as well—assessing opportunities, weighing risks, and exploring the practical implications of both your short- and long-term decisions. When you work with us, we give you options that are fully aligned with your business strategy. If you need to do more with less, we will implement the technology to automate your business processes. If it's financial, we can show you proven benchmarks and best practices that can add value company-wide. If the issue is operational, we'll consult with your people about workflow efficiencies. If it's compliance, we'll ensure you meet the requirements and proactively plan to take full advantage of the changes at hand. At every stage in your company's lifecycle, we'll help you find the right balance of people, processes, and technology.

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