



# United Way Eases Grant Management and Reporting with Comprehensive Business Solution

IT plays a key role for United Way Worldwide, helping it maintain a streamlined operation so that it can better advance the common good. However, its legacy account system led to a number of inefficiencies. Most notably, the complexity of reporting hindered productivity, responsiveness to donors, and insight into grant spending. To remedy this, United Way implemented Microsoft Dynamics GP and has since seen considerable improvements in employee productivity, budgeting, grants management, and financial management and control.

## Results

- Streamline reporting, redirect time savings to support change
- Improve budgeting and grants management
- Gain financial management controls

## Industry

Nonprofit/Charities & Philanthropic

## Country or Region

United States

## Customer Size

204 employees

## Number of Users

14 employees

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*"By helping us run our business better and more easily, Microsoft Dynamics GP is freeing our time to focus on our mission."*

Chris Keightly, Vice President of IT, United Way Worldwide

United Way Worldwide is the leadership organization for more than 1,800 United Ways in 41 countries and territories; there are more than 1,200 United Ways in the United States. The world's largest, privately supported nonprofit, the mission of United Way is to advance the common good and improve lives by mobilizing the caring power of communities around the world. Acting on this mission, United Way works to create long-lasting community change that addresses the underlying challenges that prevent progress in the areas of education, income stability and health—the building blocks for a good quality life.

To better support local United Ways and the communities they serve, United Way Worldwide strives to operate as effectively as possible. This means not only having the right people and processes in place, but also being efficient. "We use technology to drive operational efficiencies," explains Chris Keightly, Vice President of IT, United Way Worldwide. "The less time people on our front line have to spend getting the information they need to do their jobs, the more time they can focus on our mission."

United Way Worldwide's legacy accounting system often proved a barrier to such aspirations. "To run a report, we would extract all the data to Microsoft Excel and then format and process it for further analysis," remarks Keightly. "It was a time-consuming effort, and if someone then wanted to see the information in a different way, we would have to start over."

Because reporting took so much time, specific employees took ownership of running specific reports, and they only ran those reports quarterly. Not only did this lead to needless dependencies, but it also meant employees could not get the information they needed, when they needed it. Says Keightly, "The last thing we wanted was for supporters to make a donation and then think we didn't have good control over it because we couldn't

run a report for them when they inquired into how their money is being spent.”

The system also simply lacked certain areas of functionality, for example to handle approvals and to allow headquarters to issue financial credits to local chapters to spend on training. As a result, United Way financial managers handled these tasks manually.

*“Instead of spending all our time to just get the reports out, we can now take a step back and analyze the data.”*

Chris Keightly, Vice President  
of IT, United Way Worldwide

## Solution

To solve the reporting issues, United Way Worldwide implemented Microsoft Dynamics GP with the help of Microsoft Gold Certified Partner SSI Consulting. Says Keightly, “Microsoft Dynamics GP offered the flexibility and reporting capabilities that we needed, and it came at a price that was extremely attractive to us as a nonprofit.”

With Microsoft Dynamics GP in place, United Way Worldwide gains comprehensive accounting functionality, ranging from accounts payable, accounts receivable, and general ledger to fixed assets management and grants management. With such comprehensive functionality on a single Microsoft SQL Server database, accounting staff can quickly pull the information they need based on any number of dimensions. And they can do so with the tools of their choosing, be it through Microsoft Dynamics GP, Microsoft FRx, SQL Server Reporting Services, or even Microsoft Excel.

Most recently United Way has taken advantage of the grants management functionality and ease of reporting in Microsoft Dynamics GP to expertly manage the funds for the construction of the Mary Gates Learning Center—a new training center at the United Way Worldwide headquarters. Says Keightly, “Helping us gain better control over the budgeting of our projects, Microsoft Dynamics GP enables us to enter a range of dates and view all the costs, ranging from travel, food, consulting, architecture, and construction. We can then categorize those costs based on a number of criteria or quickly run the report again for a different period of time.”

The flexibility of the solution allowed United Way to customize it to enable headquarters staff to issue training credits to local chapters along with dues payments. Says Keightly, “Now if someone takes a class here in Alexandria, we can automatically reimburse them based on their credit.” The organization can now also take advantage of approval workflows to instill control over financial management.

United Way aspires to extend access to Microsoft Dynamics GP from the current narrow focus on financial management to encompass the organization’s other business groups in the future, enabling them to access key information and perform reporting on their own.

## Benefits

By moving from a legacy system to Microsoft Dynamics GP, United Way Worldwide has seen considerable improvements in productivity and

reporting and now has easy access to the information it needs to improve donor relations and gain tight control over grants and budgeting.

### **Streamline Reporting, Redirect Time Savings to Support Change**

With all information in one place, United Way has eliminated the need for manual data entry and eased financial management and reporting. In fact, with Microsoft Dynamics GP, United Way has cut the time to run reports by more than 50 percent. Testament to the productivity gained by the solution, United Way Worldwide underwent a merger with United Way International without expanding staff.

"Thanks to the efficiencies we gained, our worldwide team was able to expand its role to take on the duties of the now larger and more complex organization, without needing to add additional staff," says Keightly. "Instead of spending all our time to just get the reports out, we can now take a step back and analyze the data. We can look at donor information, trend information, budget, spending, and revenue generation, and even simply look at our capital and fixed assets, which we couldn't easily do before."

### **Improve Budgeting and Grants Management**

United Way can now draw on the budgeting and grant information it needs, when it needs it. As Keightly explains, "With Microsoft Dynamics GP we have a better way to communicate the activities that are happening in a grant. We can get back to a donor at any time and provide an update as to how we are spending funds."

Keightly goes on to add, "We can now monitor and manage our budget on an ongoing basis, instead of just quarterly, and quickly identify and isolate any variances before they become problems later."

### **Gain Financial Management Controls**

United Way has gained a newfound trust in its corporate information. This control comes from more than just eliminating data entry. Approval workflows in Microsoft Dynamics GP helps to ensure that the organization follows proper protocols while an audit history allows employees to drill down into information and quickly view who made what change and when.

Concludes Keightly, "Our mission is about advancing the common good and mobilizing the caring power of communities. By helping us run our business better and more easily, Microsoft Dynamics GP is freeing our time to focus on our mission."

## **Next Steps**

- [Connect with Microsoft Dynamics](#)
- [Learn about Microsoft Dynamics solutions for public sector and non-profit organizations](#)
- [Read about ways Microsoft Dynamics helps other charitable organizations serve their communities more effectively](#)

For more information about Microsoft Dynamics, go to: [www.microsoft.com/dynamics](http://www.microsoft.com/dynamics)

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