



The Heart and Stroke Foundation of Ontario Powers Up its Fight to Protect the Lives of Canadians with Microsoft Dynamics GP

Overview

Country: Canada

Industry: Not for Profit

Customer Profile

The Heart and Stroke Foundation of Ontario is one of 10 provincial foundations and one national office which constitute the federation of the Heart and Stroke Foundation of Canada.

Business Situation

The company sought a technology solution which would help it streamline its financial reporting process.

Solution

After a thorough evaluation of a number of solutions, the Heart and Stroke Foundation of Ontario implemented Microsoft Dynamics GP.

Benefits

- Time savings
- Access to custom real-time reports
- Improved efficiency

With Microsoft Dynamics GP, much of the financial account reconciliation happens automatically. The overall reconciliation of accounts now takes much less time and effort.

Kyla Lougheed, Manager of IT Solutions, Heart and Stroke Foundation

Working to protect the health of Canadians for over 50 years, the Heart and Stroke Foundation of Ontario funds nearly 450 researchers and teams in hospital and university-based institutions across the province. As a donor dependent organization, the Foundation has a high accountability to all its supporters, therefore requiring the most accurate financial reporting. To ensure the Foundation continues to meet this high standard of reporting, the Foundation decided to replace their outdated accounting technology, and implement Microsoft Dynamics™ GP. With its new solution in place the organization has been able to drastically reduce reporting turnaround time, saving close to 320 hours each month on bank account reconciliation alone. As well, with business intelligence gained from Microsoft Dynamics GP, the Foundation is now able to execute its growth strategy.

Situation

In 2006, the Heart and Stroke Foundation of Ontario invested almost \$60 million into research and health education and community programs to help treat and prevent the leading cause of death and disability in Canada. Since 1952, the organization has continued to deliver breakthrough medical advances, effect social change and educate Canadians, both consumer and professional, on how to prevent and manage these diseases.. Remarkably, this volunteer-based health charity has accomplished this and more while receiving no operational funding from government sources. As the organization's motto states: this is what happens when you put your heart into it.

As an organization funded entirely by donations, the Heart and Stroke Foundation is particularly conscious of the need for transparency and reporting. The Foundation needs to show donors that the money collected is spent efficiently and has impact on the people the organization serves. Creating financial activity reports was a challenge for the Heart and Stroke Foundation as its reporting needs outgrew its existing accounting software, Sun Accounting.

On a monthly basis, The Heart and Stroke Foundation creates financial reports, which are distributed to its 30 area offices located throughout the province of Ontario. Its old solution submitted data to Microsoft Office® Excel® spreadsheet software where it would be manually formatted into reports. To safeguard the information, the Foundation's IT department would transform each final report into a PDF document which would then be distributed to branch offices.

"With this archaic process, creating and distributing basic reports took eight days each month, which was much too long. It also took up a significant amount of time for the IT

department to transform each report into a PDF file," says Kyla Lougheed, Manager of IT Solutions, Heart and Stroke Foundation. "A by-product of this process was that our IT team would then get inundated with questions around the reports. It was something we wanted to address as we need our IT team to focus on their core competencies."

Lougheed adds, "As well, our organization has a strategy to increase donations over the next five years and included in that strategy is a goal of leveraging our financial data to provide business intelligence to the organization. Our old system, however, was barely able to provide us with basic information, so without a new technology solution, our vision would be impossible to achieve."

The organization also found business planning to be a challenge as the limited reports did not allow it to assess program profitability or area office profitability. Additionally, meeting compliance regulations was a difficult process for the organization. The Heart and Stroke Foundation participates in some government funded initiatives, particularly in the area of tobacco use control and education. It is required to meet strict reporting regulations and timelines for any such programs, and manually gathering and processing data to meet those requirements was a massive task.

"We spent so much time just keeping the lights on that there was simply no time or resources left to think about innovative initiatives that could help move our Foundation forward," says Lougheed. "We knew we needed to make a change."

Solution

Wanting to address its challenges and recognizing the potential for turning its reporting system into a business value

generator, the Heart and Stroke Foundation embarked on a search for a new IT solution. The Foundation went through a rigorous evaluation process, measuring the performance and benefits offered by products ranging from enterprise accounting systems to products specifically aimed at not-for-profit organizations. At the end of its evaluation process the foundation decided to implement Microsoft Dynamics™ GP because of the reporting capabilities it offers, as well as its web services and self-service features. The solution's ease of use and easy integration with the rest of the organization's IT systems also made it a great fit for the Heart and Stroke Foundation.

"One of the key deciding factors for adopting the Microsoft solution was the excellent service we received from Microsoft® Gold Certified Partner TGO Consulting. As a non-profit organization, we have some very specific requirements when it comes to accounting and reporting," says Loughheed. "With previous technology vendors we found it a struggle to get the level of support we needed and felt we were dealing with people who simply did not understand our business. With TGO we knew we had found a team that not only understood our needs, but cared enough to meet them."

The Cost Effective Way to Manage Finance: Microsoft Dynamics GP is a great fit for not-for-profit organizations. It provides a comprehensive business management solution built on Microsoft's highly scalable and affordable platform. It offers a cost-effective solution for the management and integration of finances, human resources and many other critical business processes.

With the solution, The Heart and Stroke Foundation is able to access a range of detailed financial management options including general ledger, accounts payable, and accounts receivable modules for bank

reporting, cash flow management, and easy reconciliation. The solution also reflects financial data changes in real time, providing the Foundation an accurate picture of its business performance.

The Foundation is also able to derive more value out of its data and make better business decisions as the solution provides the organization with a broad range of flexible and customizable analysis, reporting, and budgeting options.

Being able to provide employees access to self service tools was one of the criteria the Heart and Stroke Foundation had for any new solution. With Microsoft Dynamics GP, the Foundation is able to provide staff with self-service options in a secure and flexible way. Built on Microsoft .NET™ technologies, Microsoft Dynamics Business Portal integrates with Microsoft Dynamics GP, so data and processes can be accessed from a Web-based portal, enabling staff to access information anytime, anywhere.

Benefits

After an 11 month implementation, the Heart and Stroke Foundation went live with its Microsoft Dynamics GP solution in September, 2006. During the implementation period, the Foundation completely revamped its accounting and reporting. The organization transformed what was once a time and resource intensive process with low returns, into a business value driver for the Foundation. The Microsoft Dynamics GP solution enabled the Foundation to create a central, secure repository of financial information, while saving countless hours and significantly improving financial reporting efficiency.

Fast and Accurate

One of the key benefits the Microsoft Dynamics GP solution has helped the Heart and Stroke Foundation realize is the

reduction in its month end reporting time. Manual report creation is now eliminated, cutting report turn-around by almost half. This reduction in processing time took place while the Foundation was introducing customized reports to provide a comprehensive and accurate real-time view of operations—including profitability of programs and offices.

“The IT staff really appreciates the fact they are no longer expected to be financial report experts,” says Lougheed. “Because we have been able to automate the creation of reports and have been able to add a lot of self-service capabilities, our IT staff can now focus on more strategic initiatives, helping us derive more value from our technology investment.”

Another area of great time savings for the Foundation is its financial account reconciliation. The Heart and Stroke Foundation needs to reconcile over 40 different bank accounts each month. Previously this had to be done manually, requiring a staff member to spend several days a month reconciling accounts.

“With Microsoft Dynamics GP, much of the reconciliation happens automatically. The overall reconciliation of accounts now takes much less time and effort,” says Lougheed.

The Foundation is also able to centralize its accounts payable through Microsoft Dynamics GP. Where previously its 30 area offices needed to issue their own cheques and process accounts payable within their office, a custom tool added to the solution by TGO makes it possible for the Heart and Stroke Foundation offices to enter their bank deposits directly into Microsoft Dynamics GP. With this tool, most account reconciliation is automatically handled by Microsoft Dynamics GP, which also automates the transmission of payables for the Foundation resulting in additional efficiency gains and time savings.

Centralized and Optimized

“One of the symptoms of the inefficiency of our old reporting system was the fact that nearly everyone within our organization kept budget records on their desktops. Maintaining these disconnected information silos was unacceptable to us in the long run,” says Lougheed. “With Microsoft Dynamics GP, we have been able to migrate all of the information into a central, secure location. Our staff can draw from that information and doesn’t have to manually track it themselves, which has resulted in immense productivity gains for the whole Foundation.” Implementing the Microsoft Dynamics GP HR module has also allowed the Foundation to gain a holistic view of its financial operations. Previously, the organization used two standalone systems – one dealing with finance operations, the other dealing with HR. The integration now provides the Foundation the ability to view employee data and remuneration information in a single database. This approach is also helping The Heart and Stroke Foundation realize financial savings as they’ve been able to reduce the number of IT systems that required maintenance.

Looking Ahead

The solution is also helping the Heart and Stroke Foundation move towards its strategic growth vision. “Microsoft Dynamics GP is helping us assess our business, for example, determine which programs need revising to make them more efficient. It is flexible enough to grow with us as we grow our Foundation, which is extremely important,” says Lougheed. “We are constantly finding new ways to use the information the system provides and we’re also putting a change management advisory team in place to assess how we can get the most out of the new tools and optimize our use of Microsoft Dynamics GP going forward.”

For More Information

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For more information about TGO Consulting products and services, call 905.470.6830 or visit the Web site at: www.tgo.ca

For more information about Heart and Stroke Foundation of Ontario products and services, call 1-888-473-4636 or visit the Web site at: www.heartandstroke.ca

With a secure and centralized reporting system in place, the Foundation is now looking at ways to leverage its technology to better meet privacy regulation requirements as well.

Best of all, this change is happening with the support and enthusiasm of the Foundation's staff.

"In the beginning, we did have some concerns about how staff would handle a complete remaking of the reporting process, but we have found our staff has had no problem adjusting to the new tools. One of our employees, someone who has been with us a long time and was quite used to the old ways of working, actually told us in a meeting that she loves Microsoft Dynamics GP. Once we heard that, we knew we were in the clear."

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to: www.microsoft.ca/dynamics

Software and Services

- Microsoft Dynamics GP

Partners

- TGO Consulting

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