

# RBP Serves the Sisters of St. Mary of Oregon

## SUCCESS STORY

### The Challenge

SSMO had expanded their ministry from two to five different entities. Their DOS-based system quickly became obsolete. It provided very limited capabilities, especially with billing and reporting. Expanding the organization using the DOS software was impossible and SSMO needed the ability to operate with their new growth.

### The Solution

RBP Methods installed Sage MIP Fund Accounting and restructured the reports, billing forms and budget information to streamline operations.

### The Result

SSMO has saved hundreds of hours annually on report preparation, they are able to see the entire organizations' operating information as a whole as well as report on them separately and they are set up to handle future growth.

Nestled in the beautiful, green countryside of Beaverton, Oregon, the Sisters of St. Mary of Oregon (SSMO) has been devoted to God's purposes since 1886. The nonprofit organization houses many different ministries including a K-12 school, a music center, a day care center and a nursing home. While the main campus sees the fruition of the many programs at SSMO, the majority of the sisters themselves reside in branch houses throughout the Portland area, where they maintain their own individual budgets based on their cost of living and ministry expenses. As the Sisters of St. Mary of Oregon faced tremendous growth by implementing new ministries, an appropriate software program became a vital tool for organizing their operations.



### **Black and White Software Issues**

About five years ago, SSMO's ministry was limited mainly to its schools. They weren't responsible for the day care and they had no parent company to handle their operations such as IT, custodial and infirmary. As they began expanding their programs and breaking off into separate entities within the corporation, their DOS-based system quickly became obsolete and provided very limited capabilities, especially in billing and reporting. Since the program already had its weak points, it would have been impossible to expand the organization through this software. As an example, this system had no report writing capabilities. It couldn't export any reports to excel spreadsheets, so when a report was created, it had to be printed off the system, then manually re-typed into a spreadsheet. This created room for error as well as disagreement with the General Ledger. As an added irritability, there were no report formatting capabilities, so it was impossible to customize the look and design of any given report.

A second and major issue with the old program was its inability to bill interchangeably throughout different entities within the corporation. When SSMO added the day care and music center, their billing methods became much more complicated. The different programs each had specific needs. Some billed tuition, some didn't. If SSMO wanted to apply a discount for multiple students it did not update this information in the system. The old program could not accommodate the intricacies of hosting several individual organizations within one large corporation.

Another huge problem with the DOS system was the lack of technological support that came with it. If the system went down or was corrupted, there was no way to resolve the issue. They would have to revert to the most recent back up and completely start over as they were unable to recover any lost data. Cheryl Harmon, Chief Financial Officer of Sisters of St. Mary of Oregon, reflects on the nightmarish experiences that she constantly faced. "There was no support and they couldn't fix problems which resulted in lots of down time. I had to become an expert of the software, myself."

### **Divine Intervention**

As a very hands-on person, Harmon took her staff to different sites which maintained similar programs. Through interviews and demonstrations, they were able to see and hear what other people



# “We couldn’t be happier with our new software. Kent and RBP Methods have made our lives so much easier.”



## Organization Profile

### Type of Business

Nonprofit serving children and the elderly

### Headquarters

Beaverton, Oregon

### Other

Devoted to God’s purpose

## System Profile

### Sage MIP Fund Accounting

General Ledger  
Accounts Payable  
Accounts Receivable Reporting  
Accounts Receivable Billing  
Forms Designer  
Data Import/Export  
Fixed Assets

liked or didn’t like about various software products. One particular organization was utilizing *Sage MIP Fund Accounting*, and it had been very well received by the staff there. The rave reviews of this software, along with a publication in *The Journal of Accountancy* which promoted *Sage MIP Fund Accounting*, solidified the decision to go with the product. Once that was determined, Harmon’s auditor gave a strong recommendation to partner with Kent Arnold from RBP Methods to handle the implementation.

The implementation took six months, but went incredibly smoothly. RBP provided the service that had been missing for so long, and they worked extremely well with Harmon, happily abiding to the special needs of SSMO. One thing that was important to Harmon during the implementation was to have ownership over the process. “They were okay with this,” Harmon comments. “They never tried to ‘own’ the process. I explained what we wanted the system to do, and [Arnold] used his experience to tell me what would work best.”

RBP and SSMO spent hours brainstorming and collaborating to create a program capable of all of SSMO’s unique needs. They also conducted regular trainings, enabling the staff to access a ‘test’ program to become familiar with the aspects of the system that they would be using in their individual duties. Arnold helped create all the standard use form designs for all invoices, customer statements, and all reports in *Sage MIP Fund Accounting*. In addition, all of the Accounts Payable was directly put into the system so that there was no duplication. “[Arnold] helped create all of the import files so that all we had to do was put the data in a spreadsheet—we imported the budget, customers, vendors, General Ledger and fixed assets. Nothing had to be done by hand,” says Harmon. All of this groundwork remarkably permitted SSMO to be up and running on July 1<sup>st</sup>, the very first day of their new fiscal year.

## Better Billing is a Good Habit

Harmon was very pleased with the result. “Although things looked different, we didn’t miss a beat.” The old system would never have been able to handle the restructuring of SSMO into separate entities. Expanding from two corporations to five as well as the ability to perform advanced reporting and billing has provided SSMO the opportunity to better serve their community. All of the benefits for which they were hoping to have now come to fruition in *Sage MIP Fund Accounting*. They are able to bring the entities together with intercompany transactions, yet report them separately, as well as offer the discounting. This has saved Harmon hundreds of hours annually as she no longer has to manually take the information out of the old system and putting it into a separate spreadsheet.

## Faith in People

As their organization continues to expand, SSMO is confident that they can handle the challenges that face their complex nonprofit organization. RBP not only implemented a new system, but also gave the staff at SSMO the ability to be self-sufficient in their software needs. Success in an implementation is measured by autonomy with the new system. Arnold summarized it succinctly, “We provided the vision to utilize the package’s capabilities to achieve the results they wanted to see.” Because of Arnold’s hard work, SSMO had a truly successful implementation and now has a product that works for them, as well as a faithful support staff to oversee their every day operations.

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