

Improved Visibility Boosts Donations 10% Annually to Serve More Patients

Remote Area Medical

Challenges

Gaining Timely Reporting Across Entities and Projects

Remote Area Medical (RAM®) is a nonprofit that operates mobile medical clinics delivering no-cost health care via 20,000 medical volunteers to 45,000 patients around the world each year. As its reach has grown, so has the organization's need for scalable financial processes and better visibility into location-specific spending. RAM previously used the on-premises Microsoft Dynamics GP accounting system, but found it cumbersome and opaque. Consequently, the finance team struggled with duplicate data entry between their donor database and ERP software, a complex conglomeration of Excel spreadsheets for board reporting, and a multi-month lag on the financials.

In order to resolve these issues, RAM decided to make a switch to more powerful financial management software, and turned to its current Value Added Reseller (VAR), LBMC Technology Solutions, for input. LBMC recommended Sage Intacct as a great fit for RAM's nonprofit needs. "We wanted a cloud-based solution with flexible, real-time reporting across multiple entities or locations—and Sage Intacct fit the bill perfectly," said Don Mackay, CFO at RAM. "Unlike Oracle NetSuite and other ERP systems, Sage Intacct gives us the ability to grow without headaches when it comes time to add new clinics, update our financial workflows, or adapt to evolving reporting requirements."

Over the five years since deploying Sage Intacct, RAM's finance team scaled easily with more than 300 percent transaction growth, improved clinic visibility for better operational decisions, and delivered accurate reports that increased donor and volunteer confidence in the organization and its mission—ultimately helping fuel 10 percent more donations every year.

Solutions

Integrated Financial Systems Scale with 300% Growth

With LBMC Technology Solutions' help, RAM quickly made the transition from Microsoft Dynamics GP to Sage Intacct and immediately benefited from more efficient tracking of how much it costs to run and operate each clinic. Now that the team simply tags individual transactions with key dimensions—such as location, vendor, employee, department, project, vehicle ID, and more—their project accounting is less time consuming and more accurate.

RAM extended the benefits of their financial system of record by adding several partner solutions from the Sage Intacct Marketplace—including Martus Solutions for budgeting, Stampi for



Company Overview

Remote Area Medical (RAM®) provides free, quality dental, vision, and medical care to those who cannot afford it. The nonprofit organization sets up mobile medical centers that deliver competent and compassionate health care to those who are impoverished, isolated, and underserved around the world.

Executive Summary

Previous Software:

- Microsoft Dynamics Great Plains

Results with Sage Intacct:

- Shortened monthly close by 2 weeks
- Maintained lean finance team amidst 300% growth
- Boosted donor and volunteer confidence via visibility into clinic costs
- Helped organization consistently increase donations 10% year-over-year to serve more patients

IMPROVED VISIBILITY BOOSTS DONATIONS 10% ANNUALLY TO SERVE MORE PATIENTS

accounts payable approvals, Expensify for expense management, and Proliant for payroll. With project data flowing seamlessly throughout this robust technology stack, it's easier to set up new clinics, create spending controls, and shift data entry responsibility into the hands of field employees. The organization also integrated Sage Intacct with its Sumac donor management system, so each donation automatically flows into Sage Intacct without any manual work. All of this minimizes room for error, ensures real-time visibility into clinic expenses, and gives the team better work-life balance. As a result, they now run the financials and close the books in just a few days as opposed to the 15-20 days it took before.

"Even as we grew clinics and transaction volumes by more than 300 percent, and expanded to international disaster relief, Sage Intacct allowed us to keep our finance team lean and avoid adding staff at the same pace as the rest of the organization," noted Mackay. "We're no longer just focused on entering historical data or putting out fires. Instead, we're able to reallocate our energy to value-added analysis that directly furthers RAM's mission."

Results

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Sage Intacct's visibility into functional expenses and financials for each clinic helps RAM hold program managers accountable to donors' expectations. By demonstrating careful spending, the nonprofit has earned the trust of its donors and volunteers, which contributes to consistent 10% increases in donations year after year. Sage Intacct's statistical accounts and multi-dimensional reporting capabilities also give RAM more granular insight beyond clinic costs, such as program impact metrics per patient or volunteer, and actual spending on each plane or truck's fuel and maintenance expenses. This helps the organization decide which new clinic requests to pursue, since they can better forecast how much the development team will need to raise in order to cover equipment costs.

Overall, RAM's executives enjoy having more timely financial data at both the consolidated and individual entity level. Sage Intacct dashboards help them effortlessly monitor restricted and unrestricted donations, cash flow, revenue compared to budget, monthly short-term investment reports, and RAM's sustainability index. "Our CEO loves being able to just open up Sage Intacct and immediately see what's happening in the organization from a financial standpoint," shared Mackay. "He can track clinic costs, see which volunteers are assigned to each location, or check the number and demographics of patients served."

Board meetings are more productive now that Mackay can pull up financial reports right on the spot, including total spend against donations. If someone has a question about a line item, he instantly drills down to show where specific expenses came from, help the board make informed decisions, and determine where to focus their planning. Finally, Sage Intacct saves the finance team time when it comes to annual government reporting and audits, because all the necessary information is properly documented and easy to access directly from the system.

"Our reporting is like night and day compared with Microsoft Dynamics GP. Sage Intacct has opened our eyes by delivering real-time visibility into each and every one of our clinic locations. And now that we have greater transparency into our donations, we know exactly how many patients we can support each year and what level of care we can offer them."



Don Mackay, CFO,
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