



Non-Profit achieves efficiencies with Dynamics 365

Located in Sugar Land, TX, The Arc of Fort Bend County has served their community for over 50 years, offering services and advocating for people with intellectual and developmental disabilities (IDD). They strive to improve the quality of life of their members, providing programs and resources to those with IDD and their families.

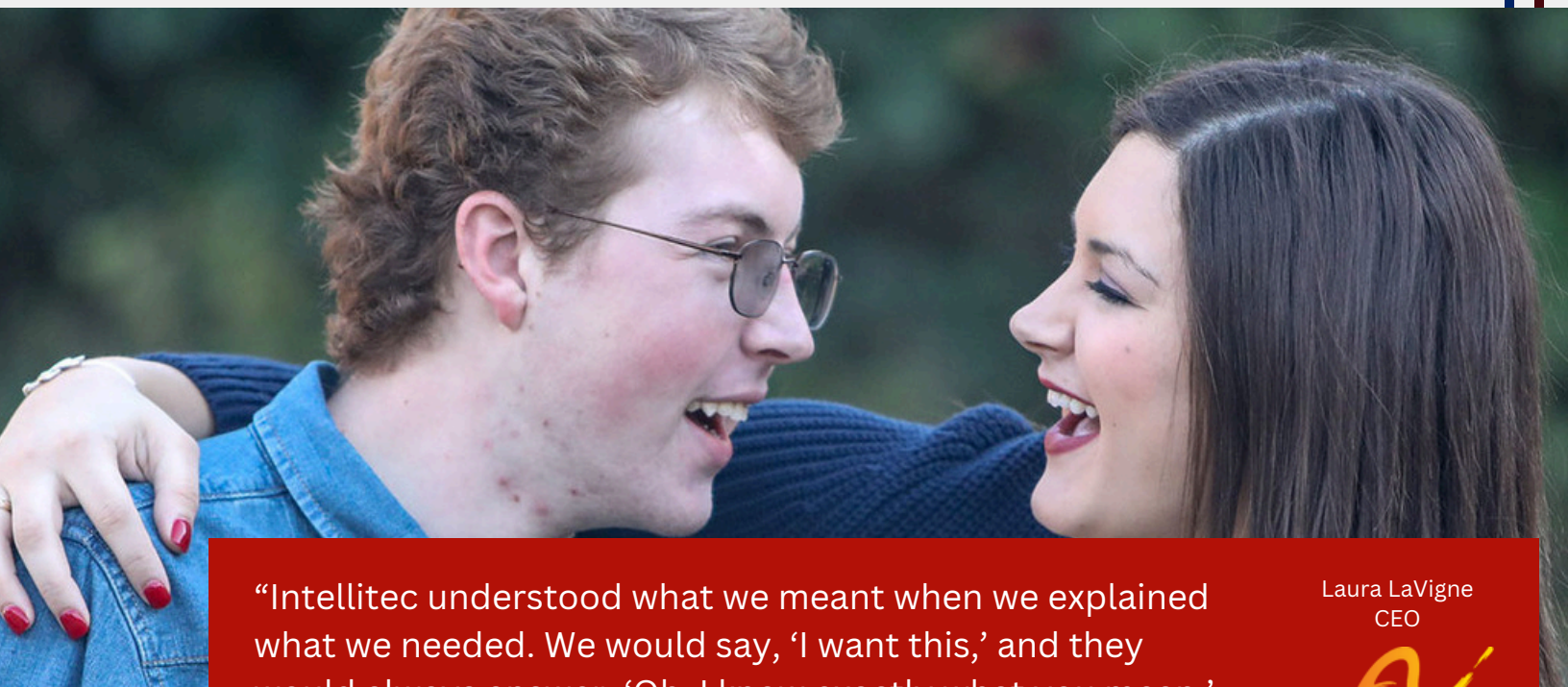
They provide monthly recreational and social activities, as well as organizing a Special Olympics delegation which creates an opportunity for members to compete in any of 10 different sports year round. They have a full-time education advocate who works with parents, teaching them how to navigate the special education system, informing them what their rights are, educating them on what the school is supposed to be doing, and helping parents obtain the support that their child needs in order to benefit from instruction.

Business Challenge

With just five full time employees and one part-timer, managing all the various programs was a challenge. Adding an additional layer of complexity was that The Arc owned 16 group homes and two commercial properties, leasing them to providers of in-home services for those with IDD. "It's a big job being a landlord because we want to maintain our homes," states Laura LaVigne, CEO of The Arc of Fort Bend

County, "We want to make sure that the clients who are living there are living in a nice home that's repaired and well-maintained and also so that the neighbors have nice neighbors living next to them."

The Arc used a variety of spreadsheets to track the membership and participation in the programs they offered, as well as the repairs and maintenance on the properties they owned. The task of tracking all the different events and offerings that The Arc provides, as well as who's availing themselves of the different facilities and services was time consuming. "We found we were spending too much time chasing spreadsheets", said Kirk White, Consultant for The Arc of Fort Bend, "That was time we would rather spend providing services to the community."



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Laura LaVigne
CEO



As part of their five-year community “needs assessment”, The Arc realized they needed a Microsoft Dynamics 365 partner to assess their programs and services, and analyze how each was mission-aligned as compared to their profitability. From the assessment results they developed a five-year plan of their goals and objectives, and the activities they were going to implement. They soon realized that implementing a CRM solution was essential to that plan. “I had never worked with a CRM solution before. But when I saw what it could do, I thought ‘Wow, I need this!’” according to LaVigne.

A search was started to find what the right CRM solution would be. The Arc reached out to business application providers, software publishers, associates in the Non-Profit industry, as well as contacts at other chapters of The Arc across the United States. The goal was to find a solution that would provide the data and reporting they needed to drive

overall efficiency, but also be affordable given their size and budget constraints.

Technology Solution

The Arc of Fort Bend looked at several solutions – some of which had unnecessary functionality, or could deliver on only some of what they needed. Ultimately, they spoke to another chapter of The Arc who had worked with Intellitec Solutions. They recommended that The Arc of Fort Bend go with Microsoft Dynamics 365 as their software and Intellitec as the implementation and Microsoft Dynamics 365 partner. The Arc of Fort Bend felt that Microsoft Dynamics 365 offered the framework they needed to track individual members, family members, as well as the renewals of memberships. It also gave the ability to track their real estate holdings and associated costs, plus how each facility was used and what they were charging per month for those facilities.

Intellitec Impact

By partnering with Intellitec for the implementation, The Arc of Fort Bend was able to leverage Intellitec's experience in implementing Microsoft Dynamics 365 for another chapter of The Arc. "Intellitec understood what we meant when we explained what we needed," states Laura LaVigne, "We would say 'I want this', and they would always answer 'Oh, I know exactly what you mean', and it was always right." Kirk White agreed, noting that Intellitec's know-how made the decision to go with them quite easy "I put together kind of a matrix of a number of different options," reports White, "We knew what our chapter needed. Knowing that Intellitec had done Microsoft Dynamics 365 integration with another chapter of The Arc, it just all kind of fell together and made a lot of sense."

As part of the implementation process and as Microsoft Dynamics 365 partner, Intellitec worked with The Arc of Fort Bend to determine the critical business processes that must be included in the solution, and gathered the information necessary for a successful implementation. They identified the key areas as Adult and Youth Programs, Advocacy, Events, Facilities, Fundraising and Memberships. Intellitec then configured Dynamics 365 to meet those requirements. The next step was to take the processes The Arc identified and run the users through these processes in Dynamics 365, using The Arc's own data sets. This gave the users a feel for the system, and helped identify any areas of the software that needed further fine turning. From there, Intellitec trained key staff members on the system, and gave guidance and support as they went live. "I was floored at what Intellitec was able to do and stay in our budget level," notes Kirk White.



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Now that they are live on the solution, Laura LaVigne feels they have taken steps forward on being able to deliver on their mission in an efficient manner. They have information at their fingertips that before was difficult and time consuming to gather. "I now have the numbers that I can give to a grantee, where before I only had estimates," states LaVigne, "Now I have quantitative measurements that I can put out there and show people, and I can do so easily. That's the most important point to me."

As for what she would recommend to other Non-Profits, LaVigne had direct advice "If another nonprofit would come to me, I would absolutely recommend Dynamics 365. I would recommend that they find the money, that they write a grant, that they somehow get this together because automation and joining the 21st century is so important for us to be able to keep up and to be able to compete for the dollars that are out there."