



Success Story

Welter Consulting and Abila MIP™ Brings Fund Accounting Health to MCHC

Mendocino Community Health Clinic, Inc. (MCHC), is a Federally Qualified Health Center (FQHC) headquartered in Ukiah, CA. For 25 years, this nonprofit organization has provided medical, dental, OB/GYN, behavioral health counseling and psychiatry services. With a mission to provide the highest quality care for everyone in its communities, MCHC has the great task of offering health care services to all people including low-income patients and anyone who qualifies for Medi-Cal. They do not turn away anyone based on their inability to pay and serves patients in a language and manner that best suits their needs.

To provide these services, MCHC relies upon donors and grants. With a growing number of federal grants, local and private foundation grants and collaborative grants MCHC found themselves buried in manual work and realized they had outgrown their accounting system.

Disparate Systems Cause Processing Pains

MCHC had separate accounting, HR, and Payroll systems that didn't talk to each other. MCHC's Payroll Coordinator, Julia Ferrigan, comments, "Our payroll system was not connected with HR. We were manually entering paper timesheets into payroll. With 340 employees and multiple locations, we often had data entry errors that needed to be resolved."

Reliance on grants for funding, create unique needs for MCHC. "We track individual grants, create budgets and report to grantors," said Lavonna Schrock, Controller at MCHC. "Unfortunately, our accounting system wasn't able to automate our processes. We were overwhelmed with manual work and separate financials to show grantors how we spent their money."

"We needed an integrated system that would track grant funding, eliminate manual data entry, and provide the reports we needed," said Schrock. "Our team was ready for a change but we needed someone who could help us develop best practices. We were ready to invest in a new system and training, and we wanted to do it right." MCHC reached out to a trusted colleague who referred them to Abila MIP and Welter Consulting.

Welter Delivers Integrated Training and a Robust Cure

MCHC chose Abila MIP because the fund accounting software included integrated modules for HR, payroll and grant management. They partnered with Welter Consulting to implement and train them on their new fund accounting system. Vicki Welter, President of Welter Consulting comments, "I was so impressed with the MCHC team. They weren't afraid of change and wanted to do things the right way from reconciling to reporting!"

"The team at Welter Consulting brought an unmatched expertise right from the beginning," said Schrock. "They are CPA's with many years of experience and are well informed on issues specific to nonprofit accounting which was a huge benefit when implementing a new system."

“Welter’s cross training brought cohesiveness and open communication between departments that we’ve never had before. The joint training cleared up the confusion and provided clarity for our processes and people.”

Lavonna Schrock, Controller at MCHC

Cross training was a key part of the implementation process. “One of the smartest things MCHC did was allow for cross training between departments,” comments Welter. “By having accounting, HR and payroll sit in on all training, they could identify who would be the best person to do certain reconciliations. They also identified how to hand off processes between departments. Correction processes were taken to the next level based on input from all areas.”

“Welter’s cross training brought cohesiveness and open communication between departments that we’ve never had before,” stated Schrock. “There’s a problem when nobody is talking. The joint training cleared up the confusion and provided clarity for our processes and people.”

System Integration Reduces Errors and Brings Healthy Productivity

The new system brought the efficiencies and accuracies MCHC was looking for. “Now that payroll is integrated with the HR and accounting system, we can use electronic timesheets. This has been a huge timesaver for my department, not to mention that the system is far more accurate,” shared Ferrigan.

Ferrigan continues, “During end-of-year processing, Welter Consulting helped us figure out how to fix some payroll issues that came up. This is an incredibly busy time for everyone, but they fit us into their schedule and solved the problem for us.”

MCHC eliminated manual data entry in Excel and because of Abila MIP’s integration capabilities, the nonprofit gained financial reporting abilities that brought great visibility to the organization. With increased detail, they are now able to drill down on actuals, see if they are within budget, and create better future budgets. Welter evaluated the general ledger and proposed changes which helped with some complicated balancing issues.

Ferrigan described more time savings. “Populating the new ACA form (1095-C) at the end of each month is a huge time-saver when you get to the end of the year. EEO (Equal Employment Opportunity) reporting is much faster with the HR module compared to years past when it all had to be figured out manually. Said Welter, “We developed quarterly reconciliations so that end-of-year processing time is down to nothing. Catching things every quarter really takes the pressure off year end.”

Welter Sets MCHC Up for Long-Term System Health

The new system enabled better reporting for all departments. Financial reporting directly from MIP saves time and is far more accurate. “I am a huge fan!” said Schrock. “I love using DrillPoint to create our own reports. This is a benefit I didn’t expect, but now I couldn’t live without it! We can now easily track and report on grants. HR reporting is now simple and provides what we need for EEO and ACA reporting each year.”

“With the help of Welter Consulting and Abila MIP, we are set up for success,” Ferrigan comments. “Abila MIP increases transparency and collaboration between all our departments. Welter Consulting was willing to help us with whatever we needed, from payroll and accounting to process set up and training. Their knowledge of nonprofit reporting combined with their deep understanding of Abila MIP helped us set a firm foundation in place. We can better communicate with each other, identify errors and fix them. I’m so glad we made this change!”



Welter Consulting is a technology firm empowering nonprofit and government organizations with effective software, consulting & training. We are committed to finding the most affordable technology, the most powerful solution, and providing expert support. By leveraging technology and superior reporting, our team helps to free more of your time to devote to the important work of your mission. We are passionate professionals who choose to work in the nonprofit sector for the same reason you do – helping others.

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