



# College Success Foundation Soars with Welter Consulting and MIP

Based in Washington State, College Success Foundation provides low-income students with the support they need to attend and succeed in college. The foundation works with students as early as middle school to prepare and connect them with the resources they need to be successful in college. By providing in-depth financial assistance, College Success Foundation has created a scalable and effective model of helping students prepare for and attend college.

However, the organization had a major problem. The accounting system wasn't set up to accommodate the needs of the organization. Closing took 45 to 50 days, and even then, it was anyone's guess whether it was complete. Staff had to generate reams of paperwork to finish each closing, so much paperwork it filled half of a file cabinet. Extraneous journal entries required correction, which meant printing off page after page of journal entries to fix mistakes.

The data in the system was accurate, but in such tedious and minute detail that no one outside of the accounting department could understand it. Everything that needed to get done in the old system was hard to do.

Instead of searching for new software, the organization began the search for a software consultant to fix their current system.

## Welter Consulting: A True Partner

Sarah Porter, Director of Accounting and Finance, and her team at College Success Foundation interviewed several consultants before choosing Vicki Welter of Welter Consulting.

"Vicki has been an excellent partner for us," Sarah said. "She asks the right questions to get the right answers."

Many consultants, Sarah found, just want to implement the solution they know, rather than the solution that's right for

their client. "I talked to other Abila MIP consultants in our area, but I could tell that they didn't really understand our issues."

Sarah found that Vicki was unlike any of the other consultants she spoke with that spring. "Vicki understood, in just one conversation, our problems. She knew immediately what we needed the system to do."

## Creating a New Chart of Accounts in Record Time

Welter Consulting embarked on the project around April. By July, the enhancements were ready for rollout.

One of the solutions Vicki suggested was a new chart of accounts. By anyone's standard, creating a new chart of accounts is a major undertaking. Sarah was afraid it would take a long time, but Welter Consulting was able to set up the entire new chart of accounts and make it operational in just about three months.

"It was a surprisingly fast turnaround for such a major undertaking," Sarah said. "But it was so necessary. The old chart of accounts was completely out of sync with what we were trying to do."

## New, Streamlined Reports

Another problem Vicki was able to solve was the reporting issue. "The data we had in the system was accurate, but the reports we produced weren't helpful," Sarah said. "Our team had a tough time understanding the existing report. Vicki helped us sort through the information available to figure out what we really needed. We created a reporting structure that now truly meets our needs."

The new reports focused on the information that the Foundation needed, presented in such a way that was easy to grasp. "Now we have both accuracy and data visibility," said Sarah.

“We feel confident that we’re in a much better position now to achieve our goal of serving more students by 2030,” said Sarah. “We used to say 20,000 by 2030. Now I’m confident we could serve 30,000 by 2030 with our newly configured Abila MIP system.”

### Accommodates Changes with Ease

Recently, the Foundation shifted its reporting model from a centralized one to a regional reporting method. In the past, the finance team would have braced for the extra work getting the old system up to speed. But the reorganized chart of accounts and new reports proved so flexible that the Foundation had no trouble adjusting their accounting to the new model.

“The only thing that changed was our reporting,” Sarah said. “We capture new data now. But the reports that Vicki set up were so flexible, it was easy to make the change when our organization made structural changes.”

### Saving Trees (and Time) During Closing

The closing process is now so swift and smooth that Sarah and her colleague, Finance Manager, Debra Weiss Wilson, can complete the process without “killing trees” as Sarah jokes since they’ve eliminated a great deal of the paperwork that accompanied the former method.

Now, closing takes just 10 days, and both Sarah and Debra agree it could probably be done in less time if necessary.

“We’ve cut closing time by 75%,” said Debra, “and staff by 25%.” “Not to mention saving money on paper!” Sarah added.

### The Foundation’s Growth: Ready to Serve More Students

The reconfigured Abila MIP accounting system couldn’t have come at a better time. The Foundation has expanded its reach and has grown by approximately 10% since reworking their system.

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### Building a Strong Foundation by Fixing Software Setup

Both Sarah and Debra can’t believe how far they’ve come after working with Welter Consulting.

“Thanks to Vicki’s expert advice and the training she provided, we were able to easily update and tweak the system ourselves,” Debra said. “The results far exceeded our expectations. We were able to distribute ALL of the worksheets a whole month ahead of last year!”

“I never dreamed we’d be able to achieve such efficiencies,” Sarah added. “It just goes to show you what you can accomplish when you have the right consultant to guide you.”

### Results Achieved

- Completely revised chart of accounts
- Revamped reporting now meets the foundation’s needs
- Training that empowered finance leaders to make their own updates
- Closing reduced from 50 days to 10 days (or less)
- Worksheets and reports distributed ahead of schedule
- Organization now ready to serve 30,000 students by 2030



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 ore 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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info@welter-consulting.com | welter-consulting.com | 19410 Hwy 99, Ste A259 | Lynnwood, WA 98036