



OPAL Outgrows QuickBooks and Moves to MIP with Welter Consulting

OPAL Community Land Trust is a unique nonprofit organization. Located in the Orcas Island community of Washington State, the Trust was founded in 1989 to help year-round residents secure affordable housing. Like many desirable locations, real estate prices on the island soared during the 80s. People who worked locally couldn't afford to live in the communities in which they worked. OPAL serves as a bridge between families and the housing market, enabling residents to put down strong roots in the community through affordable home purchases or rentals. Today, OPAL provides housing for about 8% of the island's year-round population and continues to fulfill its mission to help families, single people, and people who are elderly and those with disabilities to find and afford housing.

Moving from QuickBooks to MIP – More Challenges Than Expected

As OPAL grew and added more creative ways to help people afford housing, the organization knew it had outgrown QuickBooks. While QuickBooks was fine for basic bookkeeping, their accounting needs have grown increasingly complex over the years. The chart of accounts, for example, contained eight segments and hundreds of funds and accounts. After much searching, the organization chose MIP for its fund accounting focus and ability to handle complex nonprofit accounting setups.

Even though OPAL knew they had made the right choice in MIP, the migration was not smooth sailing. Miscommunications about what was included in their purchase led to slowdowns and snafus.

Added to this was high staff turnover in the accounting department. OPAL couldn't find anyone locally who could work in their office and who understood MIP. The result was 100% staff turnover during a time when continuity was vital.

Welter Consulting: Amazing MIP and Nonprofit Accounting Expertise

Lisa Byers, Executive Director of OPAL, reached out to her network of trusted colleagues in the nonprofit sector seeking an MIP expert who could complete the migration. Welter Consulting and Vicki Welter came highly recommended from other Welter clients. What attracted Lisa to Welter Consulting was both Vicki's approach to their problem and her deep MIP and nonprofit accounting experience.

"Vicki was both knowledgeable and forthright," Lisa remembers. "Although we spoke with several consultants, in the end, we chose Vicki and Welter Consulting because of their honesty, experience, and integrity. We felt great confidence that they could help us overcome our challenges and the steep learning curve that goes with moving to true fund accounting."

Once Lisa began working with Vicki, she quickly realized she had chosen the best consultant for OPAL's needs.

"Vicki has an amazing ability to remember everything about our organization and our accounting needs. Not only did she help us with the migration problems, but she back tracked into the whole setup, helping us uncover several areas we hadn't covered during our initial due diligence," said Lisa. "She helped us sort through the

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Lisa Byers, Executive Director of OPAL

many choices facing us. She understands MIP thoroughly, and she also understands the nuances of our work and nonprofit accounting.”

“Like a Member of Our Team”

Vicki quickly rolled up her sleeves and became a virtual member of the OPAL accounting team. It couldn't have come at a moment too soon. Lisa recounts the many challenges OPAL faced three months into the migration from QuickBooks to MIP.

“We would get one area of our accounting working correctly in MIP, and then another area would get behind. Even after months into the migration, we were not fully up to speed. Vicki quickly became – and still is – my go-to person for MIP. Not only is she smart, but she's also fun to work with, and we can laugh at the challenges before digging in to solve them. She's been the bright spot in this migration.”

Results Achieved: A-133 Audit Without Findings – During Period of 100% Staff Turnover

Today, two years after moving from QuickBooks to MIP, Lisa looks back with a sense of accomplishment. “During our first year working with Vicki and Welter Consulting, the organization submitted a full A-133 audit without any findings. This was completed during a year when we experienced 100% staff turnover, implementation of a new system, and countless other challenges, yet through

it all Vicki helped us prepare for a thorough audit, on time, that met the highest federal standards.”

Lisa now views Vicki not just as a consultant, but as a vital virtual member of the accounting team at OPAL. “We're a place-based organization, and very much involved with our local community. It seemed odd at first to work remotely with someone. But now, Vicki is a member of our team even though I have never met her in person. She's been our guide during some very challenging times, and an asset to our organization's accounting and MIP management.”

Although OPAL has more work to do with their MIP accounting system, they know it will get done because Welter Consulting is now their go-to partner for MIP and nonprofit accounting guidance.



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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