

Nonprofit Organization ERP Software: Case Study of a System Implementation

Key Takeaways:

- RubinBrown was engaged to provide business process mapping services along with Enterprise Resource Planning (ERP) system assessment, evaluation, selection, and execution services. During the execution phase, RubinBrown provided project management, organizational change management, training services, and data advisory support related to the ERP implementation.
- Replace a suite of custom software applications and an aging finance and accounting system with a modern, cloud-based ERP.

Client:

This \$68 million independent nonprofit Agricultural Research Organization (ARO) is dedicated to delivering science-based solutions to some of agriculture's greatest challenges. With a focus on fundamental, translational, and applied research, the organization supports innovation in sustainable agriculture and land stewardship. It provides no-cost consultation and education to farmers, ranchers, and land managers, helping improve practices and productivity across diverse landscapes. The organization also operates seven research and demonstration ranches/ farms that serve as hubs for field-based research, training, and community engagement.

Challenge:

The ARO leadership was refocusing on the organization's mission to applied research from pure research. In addition to the mission shift, the organization was moving from the traditional pro bono services model to a fee for service model. This was a tectonic shift for the organization that required major changes in people, process, and technology.

Actions:

Conducted comprehensive mapping and documentation of all core business processes across the organization to establish a solid foundation for digital transformation. Led the organization through a full-cycle ERP software implementation, guiding stakeholders through each critical phase—including assessment of initial needs, solution evaluation, vendor selection, and the successful execution and deployment of the chosen system.

Successfully managed all facets of a complex, multi-million-dollar project from inception to completion, ensuring alignment with organizational goals and stakeholder expectations. Oversaw every phase of the project lifecycle—including initiation, detailed planning, execution, continuous monitoring and controlling, governance oversight, and formal project closure—while maintaining scope, budget, timeline, and quality standards throughout.

Solution:

RubinBrown provided end-to-end project leadership, overseeing every aspect of the initiative, including the evaluation and selection of a new ERP software solution. Through a structured and collaborative decision-making process, the client ultimately selected Microsoft Dynamics to enhance productivity and collaboration, along with the UKG Human Capital Management (HCM) system to modernize workforce management and HR operations.

The seamless system integration was successfully completed according to the established project timeline and within the approved budget.

The initiative delivered the intended improvements to key business processes, resulting in measurable increases in operational efficiency, better cross-functional collaboration, and streamlined workflows across all departments and functional areas.

Results:

Led the design and successful implementation of a new Chart of Accounts structure, developed specifically to support and align with a newly adopted fee-for-service business model, ensuring accurate financial tracking and improved reporting capabilities.

Streamlined and automated several previously time-consuming and highly manual processes across Accounts Payable, Budgeting, and Procurement functions, resulting in increased operational efficiency and reduced administrative workload.

Delivered enhanced system capabilities to enable more accurate and transparent tracking of product costs, detailed reporting of Cost of Goods Sold (COGS), and the implementation of a fully integrated grants management solution to support financial oversight and compliance.

Developed and implemented a new integration between the Human Capital Management (HCM) system and the ERP platform, enabling automatic population of direct labor cost components for both projects and grants. This streamlined process significantly reduces manual data entry, minimizes the risk of errors, and saves considerable time and administrative effort for project and finance teams.