



**Island Health Foundation  
obtained accurate reporting,  
earned trust with their  
Board, and became better  
stewards of their donors'  
money with Aplos**



**CASE STUDY**

Island Health Foundation  
Mike Ward | Board Treasurer

Island Health Foundation is a nonprofit that exists to support its local community hospital, also called Island Health. The hospital provides care to the people of Skagit County, and it has a primary care clinic on Orcas Island that serves the residents scattered throughout the San Juan Islands.

The Foundation provides grants for new technology, equipment, and programs in the hospital, such as mental health care and community health education, that the hospital would not otherwise be able to offer due to budget constraints.

**► Challenge**

**Island Health Foundation needed a modernized fund-accounting system**

When Mike Ward joined the Board of Directors for the Island Health Foundation, he quickly learned they needed better accounting and reporting. "We were mired in several financial system challenges. We had a legacy software accounting system that was a desktop version," said Ward. "It wasn't a good fit for our fund-based program... We're not a business. We're not looking for profit/loss."

As a nonprofit, they needed to track the funds and programs that supported the hospital. "One of our core values is stewardship of our funds, and if we don't have a financial system that's going to produce financials that we can make sense of and track every dollar that comes in our door, that's a bad place to be for a foundation," Ward explained.

**► Aplos rose to the top as the solution**

Island Health Foundation needed a new accounting system to fit their business model and support their mission. They established a team to do some market research for accounting software that would meet their requirements. Ward explained, "Aplos was one of those systems that made the final cut. And based on its focus on nonprofits and fund-based

**Island Health  
Foundation**

Anacortes, WA

**Island Health Foundation exists to support their local community hospital by providing:**

- Grants for new technology and equipment
- Specific program support
- Money for hospital programs, such as mental health care and community health education

accounting, based on its affordability and accessibility being an online system, and its simplicity to operate, Aplos rose to the top of that analysis.” Ward continued, “Aplos met our criteria. It certainly was affordable, and so we took it to our full Board of Directors for approval and they approved it unanimously.”

**“Aplos rose to the top...so we took it to our full Board of Directors for approval and they approved it unanimously.”**

“We were sure that it was the right decision, but we weren't sure how long it would take to get there,” explained Ward. Island Health Foundation started transitioning to Aplos in late November, and the goal was to be live in Aplos at the beginning of January.

Lynn Mason, their Implementation Specialist, walked them through the process of building their chart of accounts and setting up their accounting. “She was extremely flexible and knowledgeable,” said Ward, and she kept them on track to be ready to go on January 1. “Lynn also made it fun. She's a great personality, and that's hard to do in the accounting business. Financials typically aren't fun,” Ward joked.

“The transition support—I highly recommend doing it, especially if you're not familiar with Aplos. And if it's your first time using a fund-based accounting system, I think it's critical to get it set up correctly so you understand what you're doing.”



**We've earned that trust back with our Board that we know what we're doing with our finances. And I think we have an enduring financial program that we can count on to best support our hospital and be good stewards of our donors' money.**



## ► Results

### **With true fund accounting and accurate reports, Island Health Foundation secured an enduring financial program**

At the end of the quarter, the team was able to audit, reconcile, review, and approve the Q1 2024 financials. “I couldn't have been more proud of our team, and our Board was not expecting to get there that quickly, but they were super impressed as well,” said Ward. The Foundation finally had the reports they needed. “We wouldn't have been able to do it without going to Aplos.”

“We've come light years,” Ward raved. “We've earned that trust back with our Board that we know what we're doing with our finances. And I think we have an enduring financial program that we can count on to best support our hospital and be good stewards of our donors' money.”

Ward would recommend Aplos to other nonprofits as well. “There's everything in Aplos that we wanted in terms of the chart of accounts structure, the ability to set up our funds the way we needed to finally be able to track them, and track the execution of them, and all the reporting tools... It's a comprehensive financial system.” At the same time, Ward explained, “It can be tailored and focused to what each individual organization requires for its mission.”

He also appreciates the reports Aplos provides. “It has a great list of reporting options, and it's super quick. It doesn't take three minutes to produce one. It produces one in about three seconds. You can dive deep into the minutiae of the report, and that's fantastic.”

**“There's everything in Aplos that we wanted... It's a comprehensive financial system.”**

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