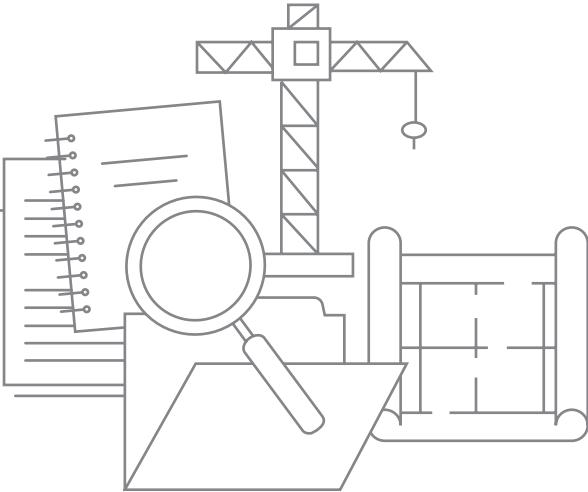


## CASE STUDY:

### DESIGN-BUILD INSTITUTE OF AMERICA

#### OVERVIEW

Design-Build Institute of America (DBIA) is a nonprofit organization that fosters innovation and collaboration in the construction industry. Founded in 1993 by architectural, engineering and construction industry leaders, DBIA offers education and certification in the design-build model. Under this system, contractors and designers work together as a unified team to provide construction services. DBIA members have worked on some of America's most successful construction projects, and over 5,000 professionals nationwide belong to the organization.



#### NONPROFIT IMPROVES BOTH THEIR TECH AND FINANCIAL FUNCTIONS

##### Background

Things just didn't feel right to Lisa Washington. As the executive director of DBIA, Washington knew that the effectiveness of the organization's finance department was critical to the organization's success. Unfortunately, many challenges existed with the department. The issues ranged from a lack of standard operating procedures to inaccuracies in the financial data being reported. Things were falling through the cracks, and the department had developed a habit of performing tasks in the same way, even if it was inefficient. This was negatively affecting the entire organization.

Washington decided that DBIA needed an objective look at its finance function. So she called in RSM to perform an assessment, which validated many of her concerns: the finance department lacked clear policies and standard operating procedures, and the quality of the work was inconsistent. Now that Washington had verification from accounting and financial professionals, she had to figure out the path forward.

##### A new phase

Although Washington had brought in RSM to perform just an assessment, she quickly discovered that the firm offered managed services. Outsourcing the chief financial officer function and bringing in professionals with access to cutting-edge technology appealed to Washington, so she hired RSM to manage the organization's accounting. The engagement's initial goals were to improve the accuracy of DBIA's financial statements and streamline their operations. But just as crucial was rebuilding trust and confidence in the financial data being presented.

"RSM had the capacity to perform tasks more efficiently, and to tackle projects like switching to a different accounting platform and updating our process," Washington says. "But they also stay up to date on any changes in laws, regulations or IRS rules, which is really hard to do with internal employees who have other duties. RSM's work allowed us to gain strategic insights into our initiatives and to make sure we know the potential changes that might have an impact on our finances."

With their finance function improving, DBIA's leaders considered additional ways in which RSM could help the organization. They soon thought of their IT department.

## The engagement expands

"Because we had experienced success on the accounting side, we looked to RSM to help with our information technology," says Tracy Powelson, director of administration for DBIA. "We needed an improvement in that area as well, because our current managed service provider wasn't meeting our needs."

Powelson says that DBIA was looking for a new provider that would be proactive and take a strategic approach to the organization's technology. DBIA wanted to be sure they had the best technology in place for the future, without the duplication of software licenses and the lapsed subscription services that had plagued the previous provider.

"RSM really seemed to be what we were looking for," Powelson says. "They felt like part of the team even during our initial interview process. RSM analyzed concepts holistically, made lots of recommendations and really dived in to give us examples of solutions that we hadn't even thought of, which was really great."

Once the IT portion of the engagement began, RSM quickly initiated fixes to longstanding issues, upgraded the organization to cloud servers and tackled infrastructure changes. Also, because DBIA was moving to a new location, RSM assisted with the physical move of the office.

"We needed someone who understood the basic logistics of a move—things like having the correct cables and wiring for our system," Powelson says. "But we also needed someone who knew a lot about bandwidth, the technical requirements and more sophisticated platforms. RSM could do all that, while thinking about what we needed in the future rather than just right now."

## The dual approach

RSM was now working with DBIA on two fronts: financial accounting and information technology. As with any major endeavor, there were challenges, such as learning the communication styles of the various team members. In addition, procedures, deadlines and responsibilities had to be established, sometimes under stressful conditions. Furthermore, the office move added a layer of complexity to most decisions.

However, RSM and DBIA worked together to overcome these obstacles—with clear results.

Washington says that on the financial side, RSM helped DBIA become more effective by leveraging the organization's banking, vendor and other business relationships. She adds that RSM also provided advanced tools and resources that improved everything from the budgeting process to the accuracy of the organization's financial statements.

"Bringing in RSM gave us a fresh start," Washington says. "Prior to RSM, we often heard the phrase 'our numbers don't match yours' when discussing the financial function. But now we have more faith in the data."

Powelson says that the organization's IT function has seen improvements as well. She says that DBIA has benefited not just from RSM's technical upgrades and platform changes, but also from more consistent help desk responses that rely on a vast IT knowledge base.

"It's much easier to get something fixed with just one call," Powelson says. "The people who are helping us now have a higher level of technical competency, and they are more likely to get it right on the first try."

## Moving forward

Washington and Powelson agree that RSM has had a positive impact on DBIA's efficiency, with both the finance and IT functions running more smoothly than in the past. They also agree that improved efficiency has a cascading effect on the entire organization.

"Better processes mean that people can spend more time developing things that will actually bring revenue into the organization, and less time trying to figure out their spreadsheets," Washington says. "They focus more on their core roles, which is always good for the organization."

Powelson says RSM's next IT project will be to analyze DBIA's cybersecurity system. Washington adds that RSM will continue to hone its approach to the organization's financial functions.

After working with RSM for this long, Washington believes that the firm's influence extends beyond the scope of the engagement. She says RSM has had a strong impact on DBIA's culture.

"When RSM first started, the morale in the accounting department was just gone, and all the challenges had beaten people down," Washington says. "But RSM is inclusive, and that definitely affects our culture. They are approachable and don't see questions as a bother or hindrance. RSM feels like part of the DBIA family."

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**+1 800 274 3978**

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