

Vendor Profile

Company name and address:

AVF Consulting, Inc.
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Company Overview:

AVF Consulting is a Microsoft Certified ERP partner specializing in accounting applications and IT solutions for non-profit organizations and associations. AVF has provided ERP and accounting solutions since 1986 and has specialized in Microsoft Dynamics NAV and Serenic Navigator since 1996 and 1999, respectively. Our staff includes 26 professionals with extensive expertise in accounting as well as ERP installation and programming. Unlike typical consulting firms in the financial solutions industry, AVF's senior consultants are capable of performing all phases of implementation from systems analysis and design, to programming, customization, and testing. Our senior staff combines the typically separate roles of "system analyst" and "implementation developer" in order to avoid communication gaps. The project manager and the lead implementer will gather your requirements and will work hands-on with you to configure Serenic Navigator to meet your specific expectations. AVF has proven that this approach avoids miscommunications, in turn saving our clients money while allowing us to deliver a system that meets or exceeds your expectations.

Statement of Financial Stability:

AVF is a Subchapter S Corporation with 25 year history of offering accounting and business solutions in the Mid-Atlantic region. AVF has a sound history of steady growth and strong financial standing. We have consistently increased our revenues over the past decade and have ranked as one of the top 100 business software consultants and resellers of financial management software by *Accounting Technology* magazine for the past five consecutive years. In addition, AVF has consistently lead the country as one of top performing partners for Serenic Software focused exclusively on the needs of the not-for-profit industry, and has been selected by Serenic Software as their *Partner of Excellence* three times over the past five years.

AVF is not currently in litigation with any organization regarding fulfillment of contractual obligations, performance, or copyright and patent infringement.

Capacity to Deliver:

AVF has been serving nonprofits for over 25 years, allowing us to understand the nuances of fund accounting, encumbrance accounting, project accounting, grants management, budgeting and other issues that are unique to nonprofits.

For years, we have worked to standardize our approach to implementing new business management systems to ensure that all of the proper steps are followed. This approach has allowed our clients to quickly become proficient with their new system. We exercise a great deal of care in selecting clients to work with and are completely committed to helping them achieve their long-term technology objectives. We believe in our approach and feel confident in our ability to deliver on our promises. Our team has implemented over 500 business systems in AVF's 25 plus years of business. Our consulting staff has an average of over 10 years of business management and system deployment experience. AVF's team of experts includes accounting professionals and a dedicated support services team that truly understands the needs of nonprofits. Our Services Include:

- Project Management
- Needs Analysis & Process Reengineering
- Application Consulting
- Custom Development
- Data Conversion
- Training
- Help Desk and On-site Support
- IT Services

Proposed Employee Profiles:



Aderonke "Addie" Adelekan, Chief Operating Officer

Addie oversees all day-to-day activities that support internal administration and the delivery of high-quality services to AVF's clients. In this role, Adelekan is responsible for internal and client-facing technology services, software implementation services, customer support, training, administration and project management.

Steeped in high-level project management experience in the financial industry before joining AVF, Addie has guided a wide variety of complex and technical projects in her career. This includes oversight of projects focused on budgeting, reporting, training, customer service, software portfolio management, compliance, government audit responses, staff management and many other key facets of organizational operations and efficiency.



Brad Winslow, Manager of Implementation Services

Brad has a commanding knowledge of how to bridge the power of the Microsoft Dynamics NAV based Serenic Navigator system with the wants, needs and methodologies of our clients. Prior to joining AVF in 2000, Brad was an accounting manager and financial analyst and he has been working with Dynamics NAV – either as a client or as an implementer – since 1997.

With a natural ability for problem solving and using his creativity to find solutions for customers, Brad has collected a vast amount of knowledge in all phases of Microsoft Dynamics NAV and Serenic Navigator

implementation, including requirements analysis, designing and programming of customizations, data conversion, testing, training, documentation and post implementation support.

Brad leads a resourceful and innovative team of implementers that work closely with not-for-profit organizations to make sure that they get an ERP system that makes their day-to-day responsibilities a little easier and fully supports each organization's financial management and operations as well as its mission and vision.

Sample of Implementation Experience

- Alliance, Inc.
- American Assoc. of State Highway Transportation Officials
- American College of Surgeons
- American Psychological Association
- American Urological Association
- Baltimore Medical System
- Beth Tfiloh
- Gifts In Kind
- Human Rights Campaign
- League of Woman Voters
- National Association of Counties
- PACT
- See Forever Foundation
- Service Employees International Union
- The Society of Cincinnati
- The Jane Goodall Institute
- The Salvation Army



Jodi Heibert, AVF Implementation Specialist

Jodi has over 20 years of business and accounting experience including financial reporting, annual budgeting and quarterly revenue forecasts, asset management, government form management, bank loan presentation, collections, ISO 9001 documentation, and the development of a safety program that significantly reduced worker compensation rates. Jodi was a Serenic Navigator Super User for nine years before she joined AVF. Steeped in accounting experience and implementation knowledge, Jodi excels at closely listening to our clients, understanding their challenges, devising solutions tailored for that specific nonprofit's operational business model, bringing projects to completion on time and on budget.

Sample of Implementation and Experience

- Alliance, Inc.
- ARTS (AED)
- ASCD
- Chimes
- Eastern Lebanon School District
- Educate Online
- Unified Community Connections (formerly United Cerebral Palsy)
- League of Women Voters
- Philadelphia Zoo
- Palmyra School District

- Responsive Education
- Sabin Vaccine Institute
- SEEP Network
- Unity Health Care



David Opdahl, AVF Implementation Specialist

Dave Opdahl is a CPA who has been advising organizations on financial management and reporting processes for more than 30 years. Having worked with school districts, businesses, unions, and nonprofits large and small, Dave is experienced at helping managers in a variety of working environments.

What differentiates Dave is his unique skill set. In addition to Serenic Navigator, Dave specializes in working with Microsoft Dynamics NAV and takes the lead on the majority of AVF's for-profit implementation engagements. He is also a Jet Reports Certified Professional and AVF's resident Jet Reports expert. As both a NAV implementer and Jet developer, Dave possesses a thorough working knowledge of both products, and as such is able to train clients and develop reports incredibly effectively.

Dave brings his strong analytical skills, knowledge, and creativity to each project and is dedicated to consistently delivering the highest level of white-glove service. By leveraging his unique expertise, Dave always ensures that his client's needs are met and voice is heard throughout the entire implementation process.

Sample of Implementation Experience

- Delaware Valley School District
- The Jane Goodall Institute
- Baltimore Medical Systems
- National Endowment for Democracy
- Commonwealth Foundation
- The Chimes
- Holcomb Behavioral Health Systems
- Groton School
- International Planned Parenthood Federation
- Laborers' International Union
- Clean Earth, Inc.
- Boys and Girls Clubs of America
- Bacchus Importers
- Richland School District
- Westmont Hilltop School District



Lynn Applegate, Implementation Specialist

As part of the AVF team, Lynn specializes in working directly with nonprofit clients to coordinate resources and manage implementation engagements. Lynn is a Maryland CPA and worked in public accounting for 10 years, conducting audits for nonprofit organizations, including Single and A-133 Audits. She also worked for the Mentor Network - a health and human services provider for adults and children with developmental disabilities - serving as the State Accounting Manager (CFO) for Maryland, Virginia and Washington, DC.

Lynn was introduced to AVF while she was the Controller at the Maryland Zoo. In that role she was responsible for all accounting functions, including the oversight of multiple profit centers and the preparation of their annual \$16 million budget. For 7 years while at the Zoo Lynn worked with Serenic Navigator and became so knowledgeable about the product that she coordinated implementations at other organizations before ultimately joining the AVF team.

Whether it is requirements analysis, data conversions, testing, training, documentation or support, Lynn has been in the clients' shoes and can always appreciate their unique perspectives. The combination of her accounting expertise and extensive work within the nonprofit industry enable Lynn to always help clients realize the full value of their financial management and accounting software.

Sample of Implementation Experience

- Maryland Zoo
- Educate Online
- Catholic Charities USA
- Council on Foundations
- Community Support Services
- National Business Group on Health
- Philadelphia Zoo
- Safe Horizon, Inc.
- Responsive Education Solutions
- YWCA of Harrisburg, PA
- SEIU



Larry Sharrow, Implementation Specialist

As a CPA with a quick grasp of technical elements, Larry represents many of the traits that AVF's clients have come to appreciate and rely on during implementations and upgrades.

Whether it is configuration and setup of the software, unit testing, requirements gathering, gap assessment, writing specifications for modifications or training and assisting clients through process optimization, Larry shares his client's point of view and stays focused on the unique challenges for each not-for-profit organization.

Sample of Implementation Experience

- Council on Foreign Relations
- SCO Family of Services
- AASHTO
- Association of Maryland Pilots