



## CASE STUDY

# Merrimack Valley Dream Center

MVDC has launched ministries in the community to meet the immediate physical and spiritual needs of the people.

**Company Name**  
Merrimack Valley Dream Center

**Company Type**  
Non - profit

**Headquarters**  
Lawrence, MA

**Julio Meran is a busy man.** As the Founder and Executive Director of the Merrimack Valley Dream Center, he wears many hats when it comes to managing the organization's multiple outreach programs. Located in Lawrence, MA, Merrimack Valley Dream Center is a non-profit grassroots organization focused on serving unhoused neighbors in the community with a focus on recovery. Additionally, there are a myriad of programs dedicated to the overall public such as back to school backpack and supply initiatives, food drives, block parties and more.

## CHALLENGE

With only a staff of two and a steady stream of 50-60 volunteers on a weekly basis for each program, Julio was able to help his community in a variety of ways but struggled with the back end management of spending and expenses. Despite having so many programs and volunteers, Merrimack Valley Dream Center only had one debit card that was linked to the business and checking account. Julio was the only person with card access and therefore had to take on the time consuming responsibility for managing expenses, reporting, and approving spend needs.

Admittedly, Julio became the bottleneck and often processes were delayed. “I was the bottleneck...I was the go-to person so every time someone had to submit an expense report or purchase equipment, they had to go through me.”

As the sole card holder, Julio also had to oversee reordering and upkeep of supplies all the while ensuring everything was within budget and allocated to the correct program. As these tasks grew to taking over 12 hours a week, Julio recognized the need for a better solution to save time and ensure projects moved forward.

## SOLUTION

Through Aplos’ integrated partnership with PEX, Julio discovered PEX’s expense management solution and quickly implemented the cards at his organization. Julio found the solution simple to set up.

“The process was surprisingly easy. I was connected with a [PEX] Account Manager and she did two or three onboarding sessions at different times to make sure I was ok and comfortable maneuvering the dashboards and walked me

through the whole set up and every single thing. The onboarding process was definitely easy.”

There have been many benefits for Merrimack and Julio’s team since initiating PEX. Not only has the cards proved to be a time saver but the features have helped streamline the expense process as well. “The cards have been working perfectly for us. I love the mobile app because it’s so easy. We tend to lose receipts a lot - it’s so easy to lose paper receipts.



“It’s a huge benefit. It is definitely a time saver and less load off my shoulders. I’m able to implement those hours into other things.”

[With the app] while you make the purchase and before you submit, you take a picture of the receipt - upload, add notes or tags and it’s done. It’s not only easy for me but also easy for [the card holder].”



## CLOSING COMMENTS

For Julio and the Merrimack Valley Dream Center, adopting PEX has proved to be a valuable asset to their organization. Not only has Julio saved time but the user friendly interface and reporting has helped him relieve additional stress. “The reports are awesome! For the Board of Directors, reports are everything. [On PEX] the reports are easy to attain and to understand.”

To those who may be on the fence on adopting a new expense platform, Julio had these final words “I highly recommend it. It is very user friendly and makes things a lot easier.”