

Success Story

Sage Intacct meets the unique needs of nonprofits

Samaritan House

“The flexibility of reporting in Sage Intacct and being able to get any information the way you want it has really been amazing for us.”

Jolie Bou

CFO, Samaritan House

Company overview

Since 1974, Samaritan House has grown to become San Mateo County's leading non-profit that brings a new level of hope, dignity and empowerment to people living in poverty, helping fulfill immediate needs and guide people to self-reliance. The largest food distribution agency in the county, Samaritan House also provides free shelter and housing assistance, medical and dental clinics, clothes for children, personalized case management and much more.

Executive summary

Previous software:

- QuickBooks

Results with Sage Intacct

- Audit prep time reduced by eight days.
- Payroll processing cut from 1½ days to three hours.
- Dramatically improved budget visibility and control.
- Greater efficiency in a paperless environment.



Sage

Company
Samaritan House

Location
California, US

Industry
Nonprofit

Sage Products
Sage Intacct





Sage Intacct has proven to be the ideal solution for Samaritan House.

Meeting the unique needs of nonprofits

Like most nonprofits, Samaritan House works within a tight budget. The organization strives to commit the vast majority of its limited resources into providing “safety net” services such as food, clothing, shelter, and healthcare to as many as 7,000 low-income people in San Mateo County, California. And like many nonprofits, Samaritan House relied on entry-level software for accounting and business reporting.

Yet limitations in applications like QuickBooks and Excel can mean manual work and guesswork decisions that drive up cost and diminish social impact. At Samaritan House, the five-person accounting team juggled multiple spreadsheets for monthly statements, while producing annual reports would take weeks of work. All the while, visibility suffered. “QuickBooks wasn’t handling our reporting requirements, and we weren’t able to easily get information for year-end financials and our audit,” as Jolie Bou, Samaritan House CFO, recalls. “It made things really time-consuming and difficult,” Jolie said.

Jolie wanted greater efficiency for the accounting team with a more automated, cloud-based solution. She also wanted to go paperless and have more robust capabilities to fulfill Samaritan House’s role as a fiscal agent for eight other agencies. Most of all, she wanted to partner with a vendor that had tailored its software to the unique needs of nonprofit organizations.

More time for analytics and innovation

Sage Intacct has proven to be the ideal solution. The cloud-based accounting platform stood out in its rich functionality, ease of use, and nonprofit capabilities after Samaritan House’s evaluation of Blackbaud Financial Edge, Serenic, and FUND E-Z. “Sage Intacct was really the only one at the technical level that was really investing in nonprofit organizations and gearing the software for the nonprofit world,” Jolie said.

Going live in July 2015, Samaritan House has seen transformative benefits in time savings and insights that help it better fulfill its social mission. For example, payroll processes that used to take one and a half days are now completed in just three hours with Sage Intacct. Preparation for annual audits in the past required eight days of pulling files, data, and report generation. Now, auditors can log in directly to Sage Intacct and select the data they wish to see. “Greater accounting efficiency translates into saving about a half of one full-time employee,” Jolie said. “And it gives the team more time for value-added analytical work, rather than just transactions,” Jolie said.

And with a paperless environment, Samaritan House is saving additional time in no longer hunting down paper documents. “We lived with QuickBooks for a long time and struggled with formatting and spreadsheets,” Jolie said. “The out-of-the-box capabilities of Sage Intacct have been a huge timesaver for us. Because we can do things so much faster, staff is always looking for ways to be even more efficient. We’re coming up with new ideas all the time,” Jolie said.



Better budget visibility and control

Samaritan House also has new insights that help it more effectively deliver services to those in need. For the first time, department heads have dashboards in which to monitor budget vs. actuals and drill into data on demand. For instance, the nonprofit has gained new transparency into overtime costs at a 24-hour shelter that it operates, and it's been able to calculate costs per visit when a person visits a Samaritan House medical clinic. That visibility enables it to better prepare and manage budgets and avoid cost overruns for both Samaritan House and eight partner agencies for which it manages funds. Those partners now have real-time information through Sage Intacct to keep track of spending.

"Managers can go in and get the information themselves on a regular basis," Jolie said. "They can monitor their budgets, they can drill down, they can see what's going on. They're asking more questions about the data they see, and it's creating conversations that are way more timely than after-the-fact," Jolie said.

The nonprofit has set up 13 dimensions in Sage Intacct for reporting on non-standardized accounting lines such as funding sources, clients and fundraisers. For instance, the development team saw a 40 percent revenue increase from an event after from analyzing costs and metrics of events, and identifying areas for improvement. "The flexibility of reporting in Sage Intacct and being able to get any information the way you want it has really been amazing for us," Jolie said.

