

## Insight into Financial and Community Impacts Support More Effective Program Decisions

United Way of Central Indiana



### Challenges

## A Quest for More Detailed, Accurate Grant Reporting

The United Way of Central Indiana (UWCI) is a nonprofit working to create lasting change in its community by aligning organizations, efforts, and resources across six counties. The organization's finance department supports this important mission by helping to demonstrate program impact through fund accounting and grant reporting. Over the years, they grew increasingly frustrated with their USL Financials system, which limited UWCI's reporting capabilities and hindered the team's productivity.

Because the software lacked a digital audit trail, they had to store back up paper copies of all general ledger entries, accounts payable invoices, and more. UWCI's senior director of finance, Lynn Auffart, remembers, "We wanted to be able to report out to our funders, government agencies, and board in greater detail, but we were constantly behind the eight ball and working up to the last minute to meet deadlines. All of our financial processes were manual, forcing us to be reactive rather than proactive, and limiting our confidence in the data."

Eventually Auffart and her team went in search of a more comprehensive financial management solution with better report writing capabilities. "We looked at Microsoft Dynamics GP (Great Plains), Abila MIP, Oracle Netsuite, and Sage Intacct, which was the most flexible and well-suited to our specific needs," she said. "I appreciated that Sage Intacct would let me simply push a button to instantly produce comprehensive financial statements, as well as the platform's ability to easily track expenses for each grant."

### Solutions

## Streamlined Financial Processes Boost Efficiency

UWCI chose Sage Intacct and brought on its partner AcctTwo to help with the implementation. Auffart noted, "The AcctTwo team challenged me with new ideas about how Sage Intacct could help us improve our processes, and they always got right back to me when I had questions." By setting up Sage Intacct's dimensions so the organization could apply each transaction to a specific department, project, restricted grant, vendor, and customer as needed, AcctTwo helped UWCI completely rework its chart of accounts and save an enormous amount of time. In the past, the organization only tracked grant restrictions at year-end, and the Excel-based process took at least 20 hours of work. Now, they can see exactly how much they have left to spend on each grant, or how much revenue they've collected on a fundraising campaign, at any point in time with the push of a button.



### Company Overview

United Way of Central Indiana harnesses the collective impact of local partners specializing in education, financial stability, health and basic needs to focus on specific, measurable goals and improve the lives of everyone in Central Indiana. Its vision is a community where children, individuals and families thrive; neighbors care for each other; and residents enjoy quality of life.

### Executive Summary

#### Previous Software:

- USL Financials

#### Results with Sage Intacct:

- Accelerated community impact due to increased program visibility
- Added valuable detail to grantor and government reports
- Sped monthly report preparation by 4X
- Increased finance team efficiency by >25%
- Improved organization-wide accountability

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The organization also benefits from seamless, paperless financial processes. For example, invoice approvals no longer require finance to spend hours each week tracking down and filing individual signatures, since all accounts payables are routed automatically by Sage Intacct. Managers upload and code vendor invoices directly into the system and have full transparency into how everything feeds into their individual budgets. In addition, Sage Intacct's seamless integration with Joseph Eve's Asset Edge tool means less time spent managing fixed assets.

"My favorite thing about Sage Intacct is probably the smiles on my team's faces," shared Auffart. "They're not struggling anymore. They're able to foresee questions from our stakeholders and they're eager to learn, which means I can delegate new tasks. With the time Sage Intacct saves us, we're building new reports and dashboards for more timely, meaningful insight, and keeping our stakeholders up to speed on UWCI's happenings."

### Results

## Greater Program Visibility Drives Community Impact

Today, nearly the entire organization enjoys access to these Sage Intacct dashboards, where they can monitor UWCI's performance and view all their key community impact metrics in one place. Sage Intacct's dimensions help the organization track specific expenses going towards various community programs – such as basic needs, literacy, preschool, health, or financial stability. What's more, the organization's monthly financial statements and grant reports are produced four times faster with Sage Intacct, leaving Auffart more time to better explain the numbers and show how they tie back into community impact.

"By giving us a better handle on our budget, Sage Intacct supports the United Way's mission," she said. "We're able to track the dollars going back into our community to see if we're making the right impact. We know how much money we're spending on specific programs, and can see the results. If a certain project's not working, we quickly move forward with a different approach to ensure we're investing our resources into the areas of greatest need."

*“Our finance team is no longer just task-oriented; we’re much more forward-thinking, which is wonderful. As a result, collaboration across the organization has increased tenfold. Everyone from our community impact department, to fund-raising, to the volunteer center, is coming to us to ask questions and plan for the future of the United Way of Central Indiana.”*



Lynn Auffart,  
Senior Director of  
Finance,

United Way of Central Indiana

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 [www.sageintacct.com](http://www.sageintacct.com)

300 Park Ave #1400  
San Jose, CA 95110

 877-437-7765



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