

Success Story

Canadian nonprofit embarks on massive modernization with Sage Intacct

UNITI - Semiahmoo House Society

“In the social service field, we always want to deliver as much as possible with as little as possible. That’s exactly what Sage Intacct helps us do. It is simpler to support our staff in making good financial decisions, and report to government agencies on the overall health of the organization—all of which ensures we’re addressing the needs of the community we serve.”

Ellen Powell

Director of Finance, UNITI



Company overview

UNITI is the partnership of three sister societies that work inextricably together to galvanize the development of diverse and inclusive communities. In particular, the Semiahmoo House Society provides quality services and support to people with disabilities and their families in British Columbia, Canada.

Results with Sage Intacct

- Improved finance team productivity by 30%.
- Reduced unwieldy chart of accounts by 50x.
- Saved ~20 days per year in intercompany reconciliations.
- Gained room to scale with less headcount as nonprofit grows.
- Uncovered new visibility for development planning and projections.

Sage

Company
UNITI

Location
Surrey, Canada

Industry
Nonprofit

Sage Products
Sage Intacct



UNITI - Semiahmoo House Society



A need for greater inclusion fuels growth

As part of the Canadian partnership UNITI, Semiahmoo House Society provides quality services and support to people with disabilities and their families. Together with its sister societies, The Semiahmoo Foundation and Peninsula Estates Housing Society, the group operates from a \$20 million (CAD) budget that's primarily funded by long-term government contracts, grants, and donations, as well as rent payments. The popularity of the nonprofit's affordable inclusive living and community inclusion services have driven constant growth and expansion over the past several decades, including new contracts and staffing for employment and recreation programs. In addition, UNITI recently embarked on its next apartment development, increasing its inclusive housing capacity by 60%.

All of these changes added significant complexity to UNITI's operations, budget, and reporting, creating a catalyst for the finance team to upgrade its accounting and property management systems. After using Sage 300 for 20 years, it was time for a change. The team turned to their trusted long-term consulting partners at Cantatus Systems Group, who recommended a move to the Sage Intacct financial management solution. "When I first saw Sage Intacct, I just thought, 'wow, this is a whole other world,'" recalled Ellen Powell, director of finance at UNITI. "Right away, I saw that the system could do everything we needed, and the company also had impressive relationships and seamless integrations with specialized software vendors. Its mature cloud practices gave me confidence that our data would remain safe and secure," said Ellen.

After migrating from Sage 300 to Sage Intacct, the team achieved 30% efficiency gains that created room to scale—by saving days through automated intercompany reconciliations and speeding the purchase-to-pay cycle—and uncovered new visibility for development planning.



Sage Intacct's multi-entity capabilities make it painless for UNITI's finance team.

Finance transformation reaps 30% more efficiency

With the help of Sage Intacct partner Cantatus, UNITI kicked off the first stage of its finance transformation right as COVID-19 hit. Despite the challenges of working remotely, they were able to harmonize the group's cryptic chart of accounts by leveraging Sage Intacct's flexible dimensions. Now, users simply tag transactions with the appropriate department, program, participant, restricted fund, and more—resulting in a more intuitive general ledger that has 50 times fewer accounts. After creating this scalable foundation, the organization simplified core processes, such as invoicing, order entry, accounts payable, bank reconciliations, and accounts receivables across all three entities.

Sage Intacct's multi-entity capabilities make it painless for UNITI's finance team to track rent payments, cash receipts, payroll, administrative staffing costs, and other expenses. Allocations are automated across entities or even between hundreds of individual departments or programs, which saves considerable time. "One of the first spreadsheets to go was our intercompany accounting, and that was huge," mentioned Ellen. "Before Sage Intacct, we were doing a lot of manual reconciliations and having to enter every shared transaction up to three times, which got confusing. My staff would spend a day on that each month, but there were always differences and we never had time to fully reconcile. Now it's perfect without us having to do anything," said Ellen.

By adding the Yooz AP automation app from the Sage Intacct Marketplace, UNITI also allows budget owners to upload a photo or scan of an invoice and instantly submit it to finance from their phone or desktop, rather than having to remember to bring paper invoices into the head office to get processed. The system electronically routes bills through internal approvals, which has the added benefit of limiting unnecessary COVID exposure for staff working with highly vulnerable communities. As a result of its new paperless workflow, the organization sped up payment processing and avoided vendor late fees.



Improved visibility helps society prepare for the future

Over time, UNITI expects to realize Sage Intacct's greatest impact from newfound insights. "I spend a good chunk of my time doing projections, planning, and calculating the impact of changes or risks," noted Ellen. "With Sage Intacct, we have a resource that makes forecasting so much easier and more exact," said Ellen. For example, as Peninsula Estates Housing Society considers its future property management needs, operating costs, and development plans, the team can view expenses by unit or by type, and make design selections that balance long-term operational costs with upfront capital costs.

In addition, the group can effortlessly report on monthly rent rolls by unit or by tenant. They also report on individual participants who have dedicated funding for multiple services from the different entities, and Ellen is building dashboards for rent receivables. She said, "Giving our property management team real-time visibility into arrears so they can manage collections without having to ask for information from accounting will be a real time-saver, especially as we expand." And rather than tediously preparing custom financial statements for every program manager, Sage Intacct's personalized dashboards support budget accountability by providing better transparency into spending at a granular level.

Next up, UNITI plans to implement Sage Intacct's Budgeting and Planning, Spend Management, Fixed Assets, and Projects modules, integrate its property management and expense management systems, and continue building out helpful metrics for stakeholders across the organization. Specifically, Ellen looks forward to connecting Sage Intacct with the society's payroll and scheduling software so she can easily add staffing hours onto dashboards. By leveraging statistical accounts in Sage Intacct, she'll be able to show program managers and funders whether they are over or under-delivering on the approved service hours budgeted for each contract.



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