

Success Story

Tribal government gains speed and agility

Peoria Tribe of Indians of Oklahoma's move to Sage Intacct fast-tracks efficiencies and savings

“As a result of the efficiencies we gained with Sage Intacct, we were able to migrate one staff member to another department, reducing our accounting staff headcount by 20%.”

Bill Chase

Director of Finance, Peoria Tribe of Indians of Oklahoma



The challenge

Peoria Tribe of Indians of Oklahoma was challenged by the limitations of their previous system, which required numerous workarounds, continuous duplicate data entry, and offered limited integration capabilities.



The solution

Based on the recommendation of its trusted accountancy/consulting firm, Peoria Tribe migrated to Sage Intacct, a proven solution for nonprofits and Tribal organizations.



The result

The move to Sage Intacct has created numerous time and cost-saving efficiencies for Peoria Tribe, allowing it to modernize its operations and establish a firm foundation for the future.

- Saving one finance FTE.
- Reduced the number of AP checks processed by nearly 40%.
- Eliminated the need for a stand-alone grant management application.



Organization

Peoria Tribe of Indians of Oklahoma

Location

Oklahoma, US

Industry

Nonprofit / Tribal Government

Sage Products

Sage Intacct

Sage Partner

REDW



About the Peoria Tribe of Indians of Oklahoma

Due to its investments in lucrative business ventures and being awarded various grants, the Peoria Tribe has experienced immense growth. This has created the financial backbone needed to support its Tribal Citizens, provide scholarships, repurchase lost original allotments, and positively impact its community in numerous ways. These decisions ultimately further the Peoria Tribe down the path of self-sustainability and sovereignty.



A positive force in the community

The Tribal government of the Peoria Tribe of Indians of Oklahoma (Peoria Tribe) provides an extensive range of services to its members and its community. From early childhood education and elder care to wellness services and housing assistance, plus a casino, hotel, and golf course, the Peoria Tribe is a positive presence — and a significant area employer. After years of using another accounting software, Peoria Tribe’s finance team decided they needed better financial management tools to help manage its varied and complex organization. Sage Intacct is the solution Peoria Tribe chose to help meet those demands.

Outdated technology puts the brake on efficiencies

When Bill Chase, Director of Finance for Peoria Tribe, joined the organization two years ago, it was working hard to expand efficiencies throughout the finance department, but the existing accounting system formed a huge stumbling block.

“We were constrained by outdated technology and dated practices,” Bill explains. “For example, there were 13 separate bank accounts spanning three banks. Managing and reconciling those accounts was extremely time-consuming.”

Bill reached out to the organization’s accounting and consultancy firm, who advised him that the smartest option was to migrate to Sage Intacct. “They work with many Tribal governments and nonprofits, so they understand our complex reporting requirements, our need for efficiency, and our grant management concerns,” Bill adds. “We trust their advice and made the move.”

Paperless payables eliminate need for one FTE

Since its switch to Sage Intacct, Peoria Tribe has successfully implemented its electronic requisition-to-pay initiative. “Previously, someone from each business location would have to drive to our office each week to bring us paperwork for processing,” Bill explains. “Now they do it all electronically, including scanning and uploading any supporting documentation.”

Bill adds that this seemingly simple adjustment is delivering sweeping impacts. “We’ve nearly eliminated our need for additional filing cabinets and can use that space for more essential work. Plus, finding a document is so much quicker. It’s all in Sage Intacct associated with the transaction and easily located from anywhere. As a result of the efficiencies we gained, we were able to migrate one staff member to another department, reducing our accounting staff by 20%.”



As a result of its shift to Sage Intacct, Peoria Tribe is saving the equivalent of one FTE on its finance team and is gaining hours back each month thanks to new efficiencies.

Streamlining banking tasks

In another efficiency move, Peoria Tribes consolidated from 13 accounts across three banks to one single account. “Instantly, we eliminated 38% of the checks we were issuing since those were checks we issued to ourselves to move money around,” Bill says. “Plus, the elimination of 12 bank accounts significantly speeds the monthly reconciliation task, saving several hours every month.”

The organization is now implementing a virtual credit card program through its bank that promises to further reduce the number of paper checks it issues. “Our Sage partner created a report that we upload to our bank, which then issues one-time-use credit cards to our vendors,” says Bill. In a related initiative, Peoria Tribe began using the banks’ Positive Pay service. The finance team uploads a file containing check information to the bank, which then validates the data against checks submitted for payment. “This has eliminated the potential for fraudulent checks,” Bill adds.

Grant management simplified

Grant management is a common challenge among Tribal governments, and Peoria Tribe was no exception. “Previously, we used a stand-alone grant management application that didn’t work well,” Bill recalls. “Now, all our grant management is handled within Sage Intacct. This saves us the cost of the other system, and saves us the time we spend rekeying data into it while eliminating the possibility of data entry errors.”

Grant reporting is also simplified. Peoria Tribe now prints the required Schedule of Expenditures of Federal Awards (SEFA) report, a financial report required of organizations that receive federal funding, directly from Sage Intacct.

Another small change yielding big results is the organization’s newfound ability to effortlessly, yet securely, share departmental income statements with grant and program directors. “Previously, our directors had to request these reports from the Finance department,” notes Bill. “Now, they can look at their Sage Intacct dashboard at any time and see exactly where they stand. It’s especially advantageous when we’re nearing the end of a grant. We don’t want to leave money on the table, nor do we want to overspend.”

Dimensions streamline chart of accounts

Previously, Peoria Tribe’s general ledger account structure consisted of six segments, five of which were balancing segments. During its move to Sage Intacct, its Sage Business Partner showed the organization how to use dimensions to achieve the desired level of granularity in its reporting in a simpler, more straightforward way. “We were able to reduce our chart of accounts significantly,” Bill notes. “We now have a straightforward three-segment account structure, one of which is a balancing segment.”



“Acquiring access to highly efficient, long-term solutions for the Peoria Team has always been a priority. Sage Intacct provides that invaluable support that we’ve been looking for. It not only saves time and money but streamlines and simplifies financial processes across The Peoria Tribal Government as a whole.”

Craig Harper

Chief, Peoria Tribe of Indians of Oklahoma

Modern cloud-based solution

As a direct result of its move to Sage Intacct, Peoria Tribe has gained cost-saving efficiencies and a platform to support its mission far into the future. “Overall, Sage Intacct reduces the costs associated with completing our accounting and financial management processes and empowering individuals to own their information,” Bill says. “While our previous system was built on decades-old technology, Sage Intacct is a modern, cloud-based solution.”

He concludes, “We have always operated with best practices in mind and had clean audits. Sage Intacct provides a solid structure to maintain these standards. It will serve the organization well for decades. We’re confident we’re on track for the long term.”



Sage



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