

## Success Story

# Grown up accounting keeps focus on the kids

Tulare Youth Service Bureau gained visibility, control — and an ally when it replaced NetSuite with Sage Intacct.

“I can look at our financials from a dozen angles in minutes. It puts us in control. We know precisely where we’re at all month long.”

**Nichol Ritchie**

CFO, Tulare Youth Service Bureau



### The Challenge

Tulare Youth Service Bureau’s new CFO inherited a partially implemented NetSuite application and found support services to be unresponsive and costly.



### The Solution

The organization replaced NetSuite with Sage Intacct, engaging a local business partner to provide personalized, compassionate, and responsive support and training services.



### The Outcomes

Tulare Youth Service Bureau is benefiting from increased financial visibility, streamlined grant reporting, and optimized workflows.

- Monthly grant reporting reduced from days to seconds.
- Budget visibility ensures every program optimizes its grant funding.
- Reduction of busy work leads to improved employee retention.
- Dashboards provide real-time insights that fuel daily decision-making.

Sage

**Company**  
Tulare Youth Service Bureau

**Location**  
California, USA

**Industry**  
Nonprofit

**Sage Products**  
Sage Intacct



### About Tulare Youth Service Bureau

Tulare Youth Service Bureau is committed to providing children and families compassionate, culturally sensitive mental health services that nurture hope, strengths, and healthy relationships at home, school and in the community.



### **Mission needs a lifeline**

The city of Tulare sits in the heart of California's San Joaquin Valley—one of the state's most productive agricultural areas. Here you'll find vast fields of grapes, tomatoes, nuts, cotton, and sugar beets. Tulare Youth Service Bureau (TYSB) makes its home here too. The organization helps the city's youth thrive by providing critical mental health services, crisis intervention, medication support, and much more.

When Nichol Ritchie joined TYSB as its new CFO, she wasn't prepared for what she found. "The prior CFO had implemented NetSuite but had never configured it properly. They were barely using the application, entering everything in spreadsheets instead. In addition, the books had never been closed—it was honestly a mess."

Nichol reached out to NetSuite for help, opening a support ticket, but waited a month for a response. "Then they told me they couldn't help me until I'd been trained on the application, and that would cost \$18,000," she recalls. "I was so frustrated. I decided right then that I wouldn't use NetSuite if that's how they support their customers. I also decided I wanted to work with a partner that understands the demands of nonprofit organizations and could help us get on the right track."

### **Taking back control**

Nichol went to the board with a plan. "I have to redo the financials anyway, so I want to pick a new application, one with a local partner for support and training," she told them. "They agreed." A previous co-worker who was brought on board to assist on the project had worked with Sage applications before, and also recommended a local Sage business partner. "Right away, I was sold," she adds. "Sage Intacct has such a clean, intuitive interface and was designed to support nonprofit organizations. I loved both the product and the partner, and we got started!"

### **Accurate budgeting maximizes every dollar**

Accurate budgeting is essential for nonprofits, but previously, budget data was held in spreadsheets that weren't accessible to the organization's various teams. As a result, program managers and therapists had little insight into the funds available for their programs.

"It wasn't uncommon for some programs to be thousands over their budget at the end of the year and others to be thousands under," explains Nichol. "If we don't spend all our funds, we risk having the county reduce next year's budget. Now, everyone has real-time data about their programs—what's been paid, what's pending, and what funds remain. Our therapists tell us they love it—they can maximize their budgets and put every dollar to work."



Tulare Youth Service Bureau has gained deep visibility into its financial operations and is able to monitor grant spending in real time to maximize the funds available for its mission.

“We’re using our insights to make other improvements as well,” says Nichol. “For example, members of our staff were struggling with some equipment that was 25 years old and needing replacement. We shared that program’s spending history with the county, demonstrating the fiscal responsibility and the need, and the county gave us additional funding for new equipment.”

### **Real-time data access**

TYSB has configured dashboards in Sage Intacct to provide real-time access to reports and data visualizations. For example, Nichol’s dashboard displays the income statement, month-over-month comparisons, operating cash flow, bank balances, and approved and pending expenses.

“As a nonprofit, it’s essential that our financial processes are robust, transparent, and auditable,” says Nichol. “Sage Intacct provides all of that and more. Because it’s so easy to access and analyze our data, we’re doing more of it. I can look at our financials from a dozen angles in minutes. It puts us in control. We know precisely where we’re at all month long.”

A year into her new role, Nichol is looking at expanding TYSB’s use of Sage Intacct to include inventory and purchasing. “We’re implementing a procure-to-pay application that integrates with Sage Intacct,” she says. “It will further streamline and automate tasks, allowing us to centralize important business tasks and gain needed visibility. For example, our therapists and practitioners can use the application to generate their own purchase requisitions, which then enter an approval workflow. That gives them more ownership and accountability of their spending.”

### **Instant grant reporting**

TYSB receives its funding through grants, primarily from the county, and is required to provide extensive grant-based reporting to the county, its board, and other stakeholders. “We use the dimension element in Sage Intacct to track our grants,” says Nichol. “Dimensions make grant reporting so much easier. We can produce the grant reports the county needs straight out of Sage Intacct. Before we got Sage Intacct up and running, I spent several days each month preparing these reports. Now they’re instantaneous.”

### **Right tools, team, and resources**

“Sage Intacct has simplified my work life—and that’s invaluable,” Nichol says. “There’s a lot of responsibility in being a nonprofit CFO. Sage Intacct has freed me from the drudgery of crunching numbers and allows me to think—and act—more strategically.”

Nichol believes that Sage Intacct is also helping the organization’s employee retention efforts. “With Sage Intacct, we’ve eliminated so much of the manual, busy work associated with accounting. That allows everyone to put their efforts into more meaningful tasks that really contribute to our mission. Accounting can be fun when you have the right tools, team, and resources.”

Nichol concludes, “Without Sage Intacct and our Sage business partner, I’m not sure how we would have gotten through this first year. I see a real commitment to service with Sage Intacct that I certainly did not see with NetSuite.”



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