

## Success Story

# Australian not-for-profit improves accounting efficiency 50%, frees finance team to support winning tenders

“Now we do our monthly close in half the time and focus on helping managers win tenders and new revenue.”

### Alan Tudo

Financial Controller, Westgate Community Initiatives Group

Westgate Community Initiatives Group is an innovative, high quality and effective provider of disability, employment, training and youth services, working with those experiencing the greatest levels of disadvantage.



### Key outcomes:

- Reduced time for monthly close by 50%.
- Paperless workflows driving audit efficiency.
- Managers applied for three times more tenders.
- Audit requests for documentation halved.

Sage

### Company

Westgate Community Initiatives Group

### Location

Australia

### Industry

Not-for-profit

### Sage Products

Sage Intacct



### About Westgate Community Initiatives Group

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### **Westgate Looks to the Cloud for a Leap in Efficiency**

Westgate Community Initiatives Group (WCIG) first opened its doors in 1986 as a Baptist church run initiative helping unemployed find work. Today, the not-for-profit helps improve the lives of unemployed and disadvantaged people living in metropolitan Melbourne and Geelong. Westgate's mix of services includes employment, social enterprise, social support and education, which generates revenue of \$16 million a year in grants from government and other sources.

The Footscray head office delivers these services through 14 hubs based in suburbs from Corio to Werribee.

Not-for-profits that manage multiple services define their efficiency by the quality of their reporting. They can deal with several streams of income that need to be acquitted against expenses for the relevant program. The complexity of reporting back to donors on each grant, across multiple services and locations, demanded a more flexible financial platform than their desktop-based system (Sage 300).

The finance team had to use several workarounds with Excel to massage reports into a meaningful format for managers. These adjustments sometimes required the assistance of an external consultant, adding hurdles and significant expense to the oversight process. Also high on the wishlist was a more modern, easier-to-use interface and a cloud-based platform that managers could log into from any hub, not just in head office.

“We need to be on premises in order to access the system, or access it via remote desktop. There's obviously internet issues where it may lag because you're accessing a server remotely, or the shortcut keys don't work because of the way that it's set up,” says Alan Tudo, Financial Controller at Westgate Community Initiatives Group

Westgate engaged its external CFO provider, Giuntabell, to deploy Sage Intacct and improve accounting efficiency by 50% and transform the finance team into an operational support role.



### **Reducing Monthly Close by Over 50% and Slashing Report Times**

Westgate evaluated several other ERP systems such as SAP ByDesign before selecting Sage Intacct, a strong favourite in the not-for-profit sector. Nunzio Giunta, owner of Giuntabell and part-time CFO for Westgate, configured Sage Intacct to the community organisation's requirements. The migration took about four months. Giuntabell managed the transition and made sure Sage Intacct had the functions required and showed where it could improve processes that were limited by the previous system. The move to a cloud-native ERP turned out to be a very wise decision as the Victoria-based organisation adjusted to months of extended COVID-19 lockdowns. Alan Tudo, the rest of the finance team and service managers could continue their daily work from home without disruption.

The greatest impact was the dramatic upgrade to the reporting process. The report writer in Sage Intacct uses a drag-and-drop interface that makes it very easy to add and remove fields and view data in multiple dimensions, says Alan. There is no need to use an external consultant. It wasn't just the finance team that appreciated the change. Service managers have their own customised dashboards that automatically update each time the manager logs on. If a manager wants to investigate the numbers behind a statistic, they can click on a section to see the raw data.

Another productivity improvement was a shift to paperless workflows. All paper receipts and invoices are scanned and attached to the electronic transaction in Sage Intacct. "Previously, there was a lot of paperwork that needed to be filed away. There's pretty much no one printing anything at the moment, everything is stored in the system," says Alan. This has made everyone's lives easier, especially the auditors. Alan estimates that requests by the auditors for paperwork have halved.

"We give the auditors a license to log in themselves. They can click through the journal entries and see an attachment for the supporting documents. Everyone's really happy with that," says Alan.



“Usually the CEO hardly hears from us because we’re busy processing data. But now, he hears from managers that they’re getting support from the finance team to generate reports on demand, acquit expenses or on engaging a tender.”

**Alan Tudo**

Financial Controller, Westgate Community Initiatives Group

**Greater Efficiency Promotes a More Collaborative Culture**

Sage Intacct has had a major impact on the efficiency of the finance team. The end of month close, which previously took two weeks, is finalised by the fifth business day. Reporting is much faster. Instead of downloading data and uploading Excel spreadsheets to folders for each manager, the team sends one email to all managers when the dashboards are ready. This has saved the finance team several hours a month, says Alan.

After each round of reports, the finance team would receive requests from department managers asking for more detailed reports in specific areas. Now, managers can drill into reports and view transactions for each GL account. “Their dashboards are amazing,” says Alan. Sage Intacct has helped accelerate a key process. Tender applications are usually quite stressful; managers and the finance team race to assemble the required information before the tender deadline.

This process sometimes requires adjustments which effectively means starting over again. Each time this occurred, the finance team had to recollect data from supporting systems such as payroll. “Now, it’s pretty easy. We can report by this department and by this month and send it across to the managers. If you want to start from scratch again it doesn’t take long at all because we know exactly where to go,” says Alan. The finance function works differently.

The finance team previously focused on processing transactions and relying on the managers to acquit programs correctly. Now the finance team makes sure that expenditure is eligible based on the conditions of each contract and makes adjustments to balance spend against revenue.

The CEO says he sees more of the finance team generally. “Usually the CEO hardly hears from us because we’re busy processing data. But now, he hears from managers that they’re getting support from the finance team to generate reports on demand, acquit expenses or on engaging a tender,” says Alan.



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