

Success Story

Finance efficiency jumps 60% at the Boys & Girls Clubs of Greater Tarrant County

Boys & Girls Clubs of Greater Tarrant County

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Robert Ehret

VP of Finance, Boys & Girls Clubs of Greater Tarrant County



Company overview

For more than 90 years, the Boys & Girls Clubs of Greater Tarrant County has served youth with life-changing programs that promote academic success, healthy lifestyles, and positive citizenship. The largest club in Texas, it serves 23,000 youth a year.

Results with Sage Intacct

- Financial efficiency increased by 50% to 60%
- Board reporting cut from 1 hour to minutes
- \$65,000 avoided in added headcount
- Speed and simplicity in merging two sister clubs

Sage

Company

Boys & Girls Clubs of Greater Tarrant County

Location

Texas, US

Industry

Nonprofit

Sage Products

Sage Intacct



BOYS & GIRLS CLUBS
OF GREATER TARRANT COUNTY



Texas nonprofit seeks an upgrade to modern cloud accounting

The Boys & Girls Clubs of Greater Tarrant County serves about 23,000 youth in the Fort Worth and Arlington areas of Texas with a range of programs geared to help youngsters mature into healthy, productive, caring, and responsible adults. The nonprofit provides after-school and summer programs, and initiatives focused on education, character and leadership, drug prevention, and gang intervention across 27 locations. With a \$23 million annual budget, financial management is essential to the organization's success.

Improving finance and accounting became a top priority when Robert Ehret, with a background in church and bank finance, joined the Boys & Girls Clubs of Greater Fort Worth as its CFO in 2014. (The club would merge with a sister club in Arlington to create the Tarrant County organization in 2018, with 290 full- and part-time employees). Robert quickly found that the club's previous accounting application, and heavy reliance on Excel, wasn't well suited to the needs of a nonprofit organization.

"It was just so difficult to extract information," Robert said. "You couldn't report across fiscal years, and the majority of our grants cross fiscal years. It was a very lengthy process just to produce board reports, and if you needed to make a change it was very painful to go through the whole process of making an adjusting entry and rerunning reports. There was no doubt we needed to make a change," Robert added.



The four-person finance team is 50% to 60% more efficient with Sage Intacct, and productivity is up 30% to 40%.

A 40% improvement in finance team productivity

Robert consulted with Trustantial, a Dallas-based IT consultancy that had worked with the Fort Worth Club for several years. Trustantial had recently become a Sage Intacct partner, and suggested Robert size up its capabilities. “Trustantial sent me a demo and I said, ‘If Sage Intacct does what I’m seeing in this demo, this is what I want.’ The dimension concept in Sage Intacct really captured my imagination, and it’s proven to be all I thought it would be,” said Robert. Trustantial handled the implementation, bringing in two years of historical data from Microsoft Dynamics GP. “Trustantial did a phenomenal job, and they’ve always provided outstanding support,” Robert said. “They’re very responsive and just a great partner,” Robert commented.

The move to cloud-based Sage Intacct has paid off with dramatically better efficiency and visibility for informed decision-making. Robert says the four-person finance team is 50% to 60% more efficient with Sage Intacct, and productivity is up 30% to 40%. In one example, board reports that took an hour to complete with Microsoft Dynamics GP and Excel are now complete in minutes. “We’re not spending nearly as much time fighting to get basic information in or out of the system,” Robert said. “That’s freed up more time for us to focus on better analysis and better reporting,” Robert added.

Sage Intacct also helped accelerate and streamline financial aspects of the 2018 merger between the two sister Clubs in Fort Worth and Arlington, which had been running QuickBooks. “It was fairly simple with Sage Intacct to nearly double our grant- and location-based cost centers to about 30 through the merger and be up and running with them almost immediately,” Robert said. “It would have been a nightmare with the previous system because we would have had to set up a separate chart of accounts for each cost center,” said Robert. And Sage Intacct has helped the accounting team scale despite additional workloads through the merger. Without the solution, Robert estimates he’d need to add at least two more employees to his team.



More 'bang for the buck' with in-depth reporting

The Boys & Girls Clubs is producing more timely, in-depth financial reports each month with Sage Intacct that include a comparative balance sheet, cash flow, income, and expenses. Those insights into budget versus actuals help grant and branch managers closely monitor spending and make data-driven decisions to adapt as needed. "We're able to produce better reports with more information faster with Sage Intacct. The ability to slice and dice data with dimensions is extremely useful," Robert said. "The more efficiently we can allocate and track costs, the more bang for the buck we can get. That equates to more youth served," Robert commented.

Robert has found Sage Intacct especially valuable for tracking restricted contributions (in which funders specify a particular use for funds) by eliminating the difficult manual work of extracting transactional details from spreadsheets required in the past. "One of my favorite things about Sage Intacct is how we can track and report on grants and restricted contributions very easily and instantaneously, up-to-the minute," Robert said. "It's as if Sage Intacct was designed specifically for nonprofit accounting," Robert said. That capability and others help the Boys & Girls Clubs improve transparency and accountability to funding agencies that want reports on how their money is spent.

One funder, the city of Fort Worth, inquired about the club's accounting system and sat down to see it in action. "They were highly impressed with what we were able to do," Robert said. "It gives them confidence that the information we provide them is accurate and reliable," Robert commented. In a next step, the Boys & Girls Clubs is looking to roll out Sage Intacct dashboards that will give operational personnel access to real-time data and key metrics. From there, the nonprofit will be able to link financials to programmatic outcomes and further increase its social impact with youth in greater Tarrant County.



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