Success Story

Catholic Charities amplifies impact with Sage Intacct

Modern, cloud-based financial management solution delivers broad new efficiencies.



About Catholic Charities of Eastern Washington
Catholic Charities of Eastern Washington (CCEW) affirms the dignity of every person, partnering with parishes and the greater community to serve and advocate for those who are vulnerable, bringing stability and hope to people throughout Eastern Washington.

Executive summary
CCEW was using Abila MIP, but the pandemic highlighted the application's shortcomings, particularly surrounding remote access. With the help of Sage business partner Clark Nuber, CCEW moved quickly to implement a modern, cloud-based financial management system and chose Sage Intacct.

Results with Sage Intacct
- Time spent preparing grant reports cut by 20%.
- Integration with Salesforce provides clear view across the organization and eliminates duplicate data entry.
- Gained capacity to manage additional grants effectively.
- Rapid, streamlined implementation accelerated ROI.

Company
Catholic Charities of Eastern Washington

Location
Washington, US

Industry
Nonprofit

Sage Product
Sage Intacct

Sage Partner
Clark Nuber

Catholic Charities
EASTERN WASHINGTON

Sage

Helping more than 60,000 individuals annually
Due east and across the Cascade Mountains from Seattle is Spokane, the state's second-largest city. It is home to Catholic Charities of Eastern Washington (CCEW), which has been serving vulnerable residents of the area for more than 100 years. With over 400 employees and an operating budget of $29 Million, CCEW positively impacts the lives of more than 60,000 clients each year.

Abila MIP not up for the challenge
CCEW was using Abila MIP to manage its finances, but when the pandemic struck, the on-premises application's shortcomings became glaring. "We needed to provide secure, streamlined remote access for our personnel," explains Wendi Snyder, CCEW's VP of Finance. "So, a cloud-based solution was our top priority. In addition, we wanted to use our move to the cloud to improve and automate other areas of our operation."

The organization's CFO recommended Sage Intacct as the next-generation solution. Wendi and Ty Hosack, CCEW's accounting manager, sat in on a demonstration of Sage Intacct provided by Sage business partner Clark Nuber, and were also quickly convinced. "We especially loved the intuitive interface of Sage Intacct, the ability to drill down into transactions, and the available integration options," notes Ty.

"There's functionality in Sage Intacct that we didn't have in Abila MIP," says Wendi. "The dashboards, automated approval workflows, and ISV integrations, for example. As a result, we're doing more inside the application and less manually or in spreadsheets."

Cloud-based solution is always on
While most of CCEW's workforce has returned to the workplace, the benefits of a cloud-based application continue. For example, Wendi recalls that previously her department would have stretches of downtime while IT staff installed server updates or performed routine maintenance. "No more," she says. "We're live and operational at all times."

Integrations amplify value
Integration capabilities were important in CCEW's selection of Sage Intacct, and the option most important to CCEW is the Sage Intacct Advanced CRM Integration for Nonprofits, which provides seamless integration between Sage Intacct and Salesforce. "It consolidates our organizational data into one place, making it accessible and keeping everyone on the same page," Ty says.

CCEW uses Salesforce to capture employee expense data, track donor, grant, and client details, and capture metrics surrounding program participation and individuals served. The data is imported into Sage Intacct automatically, so finance teams and program managers have visibility into the data each needs to do their jobs.

Next up will be rolling out the ADP Workforce Now integration with Sage Intacct. The integration will allow the organization to easily sync employee data and post payroll entries from ADP to the Sage Intacct general ledger.

Moving budgeting out of spreadsheets
Budgeting is another area of the operation benefiting from the power of partnership. CCEW implemented Questica PowerPlan, a budgeting solution that provides bi-directional integration with Sage Intacct. "Previously, we performed all our budgeting in spreadsheets. It was time-consuming, error-prone, and not collaborative," Ty says. "Now we push expenses into PowerPlan, which gives program managers up-to-date access to their budgets and actual spending."

Saving 20% on grant reporting tasks
"I'd estimate we've cut about 20% off the time we spend producing our monthly grant reports," Wendi says. "All the information we need is available and easily sharable. Plus, we can drill down and view invoices and other transactional details to help provide context to the reports. We think the time saved will allow us to take on and successfully manage more grants," adds Wendi.

Dimensions simplify complexity
The move to Sage Intacct and its dimensional general ledger allowed CCEW to simplify its chart of accounts, eliminating one segment. Dimensions also provide the organization with a straightforward way to track and report on income and expenses for every grant, department, program, activity, customer, or employee. "Dimensions provide an intuitive yet powerful way to organize, analyze, and share our financial data," says Wendi.

Wendi says she loves how easy it is to see metrics such as open payables, expected cash flow, and bank balances. "I can stay on top and out in front much more easily than before. As a result, I'm able to catch potential problems before they happen. That's hard to put a value on, but it's significant.

"Accounting software migrations have a reputation for being difficult and lengthy. CCEW's experience with Sage Intacct was neither. Clark Nuber led the way, and we were up and running and gaining value quickly. I think it's important for other nonprofits to know that the process is painless — and very worthwhile," concludes Wendi.

> "We think the time saved will allow us to take on and successfully manage more grants."
>
> **Wendi Snyder**
> VP of Finance, Catholic Charities of Eastern Washington

Sage

©2023 The Sage Group plc or its licensors. Sage, Sage logos, Sage product and service names mentioned herein are the trademarks of The Sage Group plc or its licensors. All other trademarks are the property of their respective owners.