



Executive Summary

Results with Sage Intacct:

- Gained real-time insight into key metrics that support organization's mission
- Automated processes to minimize finance headcount needs
- Saved dozens hrs/mo on grant reporting and manual reconciliation between systems
- Shortened monthly close by 2-3 days despite tripled budget
- Software paid for itself in <6 months

“With Sage Intacct, our finance team is now a much bigger part of St. PJ's strategic direction. Because most of the work of the past is now done in an automated fashion, we are spending less time looking backwards at the transactions that have already happened, and we are able to provide more forward-looking insight into the programmatic changes of the future.”

—Curtis Ruder, CFO, St. PJ's

125-Year-Old Organization Navigates Rapidly Changing Waters

St. PJ's Children's Home is a nonprofit organization that's served mistreated children in Texas with residential care and other programs for over one hundred years. However, in the past few years, the landscape of the state's foster care system has evolved, and St. PJ's changed its strategic programming in response to these dynamics. These shifts necessitated more communication with funders and grantors in order to proactively explain the agency's fluctuating financial metrics. Thankfully, the organization made a smart move about five years ago by replacing its outdated accounting software with Sage Intacct's modern best-in-class financial management.

“Sage Intacct helps us tell our story to long-term funders in a way that's meaningful and backed up with data, so they can understand why we're doing things differently and advocate for our new strategy externally,” said Curtis Ruder, CFO at St. PJ's Children's Home. “The solution's ability to quickly capture and share impactful statistical and financial metrics has been crucial to alleviating unease and maintaining continued support as we evolve the ways we're achieving our mission.”

For example, the home is shifting its focus from longer-term services towards shorter-term programs that get children out of the emergency shelter and into foster care sooner. But since the most expensive time a child is with St. PJ's is during key transitional periods like their first week and last week, this change is increasing the agency's average cost per child, which could be perceived as a rising inefficiency. The finance team addresses this by leveraging insights in Sage Intacct such as an aging schedule that shows how long children have been in the shelter, the number of children served, and cost per day of service across each program. They can demonstrate, for instance, that a third of the children have been there for less than two weeks – revealing the programmatic context behind shifting metrics.

Actionable Insight Informs Day-to-Day Operations and Fundraising

This powerful visibility drives even more value inside the organization, where leaders can use personalized Sage Intacct dashboards to more closely monitor their departments' key performance indicators and make adjustments in real-time as needed. The nonprofit's development director has an Sage Intacct dashboard that includes metrics like the number of active donors or major donors, and their average gift or total gifts to date, and also shows how those figures are changing from the prior year.

This insight, along with a big picture view into how broader child services improvements impact St. PJ's funding needs, helps in the agency's fundraising efforts. "In our emergency shelter, average cost per day is approximately \$150, while our reimbursement from the state for this contract is \$120," commented Ruder. "So every day we have a child stay with us, we give our development director a bill for \$30. With this precise data from Sage Intacct, she is able to clearly articulate the organization's needs as she seeks donations and prepares grant applications."

On the other hand, St. PJ's kitchen manager pulls up Sage Intacct to not only approve invoices, but track the number of meals served. He monitors exact food costs per meal or per child, including salaries, supplies, and everything else that goes into running a cafeteria. As trends emerge, he can quickly react with staffing or grocery order changes that keep costs low while still meeting the needs of the organization.

Best-in-Class Financial Management Lays the Foundation for Growth

"In the five-plus years St. PJ's has been using Sage Intacct, our budget, headcount, and transaction volumes have tripled, yet we've been able to keep pace while only adding one person to our finance team," noted Ruder. "Our expansion has been completely seamless and effortless thanks to the automation and efficiency that Sage Intacct's modern, best-in-class system provides."

In particular, real-time integration between Sage Intacct and the organization's Orange Leap donor management software eliminated duplicate data entry between the two mission-critical systems, reducing a two-day monthly reconciliation process to just 90 minutes. In addition, Sage Intacct's dimension-based General Ledger captures the business context of each transaction to give St. PJ's stakeholders very targeted and relevant data about their activities with minimal manual effort. The organization can easily analyze performance by departments, projects, programs, funds, grants or other drivers without having to manipulate the data in Excel, dramatically improving grant reporting and compliance.

Thanks to all of these efficiencies, St. PJ's monthly close is around three days faster, and its annual audit fieldwork takes half the time. Now that the auditors have read-only access to the organization's Sage Intacct software in the cloud, audit costs have gone down by \$5,000 a year, and everyone benefits from retaining conversations for future reference via Sage Intacct's collaboration functionality.

About St. Peter-St. Joseph Children's Home

St. PJ's Children's Home is a social service agency operating under the Archdiocese of San Antonio as an independent 501(c)3 non-profit. It was established in 1891 to be a safe and loving refuge for children in crisis, breaking the cycle of abuse and neglect one child at a time.



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