

## Success Story

# Sage Intacct meets the unique needs of nonprofits

Samaritan House

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**Jolie Bou**

CFO, Samaritan House

### Company overview

Since 1974, Samaritan House has grown to become San Mateo County's leading nonprofit that brings a new level of hope, dignity and empowerment to people living in poverty, helping fulfill immediate needs and guide people to self-reliance. The largest food distribution agency in the county, Samaritan House also provides free shelter and housing assistance, medical and dental clinics, clothes for children, personalized case management, and much more.

### Executive summary

Previous software:

- QuickBooks

### Results with Sage Intacct

- Audit prep time reduced by eight days
- Payroll processing cut from 1.5 days to three hours
- Dramatically improved budget visibility and control
- Greater efficiency in a paperless environment



Sage

**Company**  
Samaritan House

**Location**  
California, US

**Industry**  
Nonprofit

**Sage Products**  
Sage Intacct







### **Better budget visibility and control**

Samaritan House also has new insights that help it more effectively deliver services to those in need. For the first time, department heads have dashboards in which to monitor budget vs. actuals and drill into data on demand. For instance, the nonprofit has gained new transparency into overtime costs at a 24-hour shelter that it operates, and it's been able to calculate costs per visit when a person visits a Samaritan House medical clinic. That visibility enables it to better prepare and manage budgets and avoid cost overruns for both Samaritan House and eight partner agencies for which it manages funds. Those partners now have real-time information through Sage Intacct to keep track of spending.

"Managers can go in and get the information themselves on a regular basis," Jolie said. "They can monitor their budgets, they can drill down, they can see what's going on. They're asking more questions about the data they see, and it's creating conversations that are way more timely than after-the-fact," Jolie said.

The nonprofit has set up 13 dimensions in Sage Intacct for reporting on non-standardized accounting lines such as funding sources, clients and fundraisers. For instance, the development team saw a 40 percent revenue increase from an event after from analyzing costs and metrics of events, and identifying areas for improvement. "The flexibility of reporting in Sage Intacct and being able to get any information the way you want it has really been amazing for us," Jolie said.

