

Sage ERP X3 Is a Trusted Steward of Operations at The Woodlands Foundation

It is impossible not to feel the energy and enthusiasm present when camps sponsored by The Woodlands Foundation are in session. Using its fully accessible and barrier-free facilities, the foundation's programs enable children and adults with disabilities and chronic illnesses to experience social, cultural, environmental, recreational, creative, and spiritual growth. Serenely nestled in the North Hills of Pittsburgh, the 32-acre site features an indoor heated pool, 48-bed lodge, dining hall, creative arts and computer center, activity center, camping area, sports court, nature trail, amphitheater, and a par-three adaptive golf course.

This small nonprofit has complex accounting and reporting requirements, so it needs financial software with big-business power at small-business costs. Sage ERP X3 is The Woodlands Foundation's choice. "We are able to track our revenues and expenses by funding source, project, and program," explains Peter Clakeley, executive director for The Woodlands Foundation. "Sage ERP X3 is ideal for the detailed level of income and expense tracking that nonprofit organizations require."

Demanding Requirements

After being spun off from a larger nonprofit as an independent nonprofit foundation, The Woodlands Foundation decided that it needed to manage its finances more efficiently and upgrade its financial reporting capabilities. Board members and contributors alike were demanding timely, detailed financial reports that traced funds received to specific program expenditures. Regulatory bodies insisted on receiving meticulously accurate data formatted to exacting specifications. And the foundation had to achieve these mission-critical objectives constrained by a charity's tightly limited budget.

Any new accounting and financial reporting application would have to address many diverse requirements, including: delivery of real-time financial information; rapid resolution of the organization's monthly and annual books; facilitation of financial reporting for multiple parties, including the board of directors and contributors; consolidation of all the organization's financial tools into a single system; and integration with the foundation's existing information technology. Sage ERP X3 was selected for its ability to meet all of these requirements, and more.

"The decision-support system of Sage ERP X3 is a major reason we selected it," says Clakeley. "Our reports are timely and accurate, thanks to the software's automation features."

Customer

The Woodlands Foundation

Industry

Nonprofit

Location

Wexford, Pennsylvania

Number of Locations

1

System

Sage ERP X3



Challenge

The Woodlands Foundation requires a robust yet easy-to-use accounting and financial reporting application to meet its needs and those of its donors and clients.

Solution

Sage ERP X3 was selected over a decade ago and continues to meet the exacting needs of the foundation.

Results

One part-time financial clerk can handle the foundation's accounting. Three weeks are shaved off the monthly reporting cycle. Fund accounting is well supported.

With Power Comes Efficiency

While Sage ERP X3 has plenty of horsepower to manage the financial reporting of organizations with budgets in the hundreds of millions of dollars, Clakeley appreciates that its ease of use, intuitive interface, and efficient operation make it an ideal tool for managing the Foundation's more modest budget.

"We are able to run this organization with one part-time financial clerk," he says. "That is due in large part to the efficiencies gained with Sage ERP X3. A decade ago, our monthly financial reports required more effort and took us until the end of the following month to complete. Now they are wrapped up by the end of the first week in the month."

Tailored Reports

There is a broad and varied audience for many of the foundation's reports. Each manager receives reports detailing his or her department's year-to-date budget to actual performance by individual general ledger line item. Directors monitor reports that show the organization as a whole with revenue shortfalls and surpluses and expense savings and overages. "We also generate reports that meet the needs of our board of directors and of course our accountants and auditors," notes Clakeley.

"We run multiple programs and projects simultaneously, each with a different source of revenues and each requiring specific tracking," Clakeley adds. "The multidimensional features of Sage ERP X3 allow us to easily capture data and create virtually any financial report we want."

High-Functioning Fund Accounting

"We gather resources, revenue, and support from many sources," explains Clakeley. "Many of the funds we receive are restricted to use for specific programs or activities."

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**Peter Clakeley, Executive Director
The Woodlands Foundation**

Sage ERP X3 enables us to manage and track our funding sources in great detail to ensure we are complying with our donors' requests."

Time Tested and Approved

The Woodlands Foundation implemented Sage ERP X3 over a decade ago, and it continues to serve the organization well. "Three years ago we performed an evaluation of our systems to be certain we still had the best, most cost-effective tools available to us. We looked at other solutions but honestly could not find a better solution out there than Sage ERP X3," Clakeley concludes.



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