



## CLIENT STORY: VETERANS OUTREACH CENTER

### Challenges

Like most nonprofits, the Veterans Outreach Center (VOC) works within a tight budget. The organization offers supportive services designed to meet the needs of veterans and their families in Rochester, NY and surrounding regions. Like many nonprofits, the VOC relied on out-of-date software for all of their accounting. It was time for a change.

Laura Stradley, the Executive Director, along with the Board of Directors, had lost confidence in the accuracy of the financial reporting. They realized their organization was in desperate need of a software solution; at a minimum, one that was automated and provided greater visibility with real time access. Due to limitations in applications like QuickBooks, important data was input manually by staff who relied heavily on Excel spreadsheets filled with data but little insight. Important financial decisions were made by guesswork. Even within the VOC retail operation, the Flag Store, sales were downloaded manually after the transaction versus being captured in real time.

### Company Overview

Founded in Rochester, NY in 1973 by returning Vietnam Veterans, Veterans Outreach Center remains anchored in the community and offers a comprehensive portfolio of supportive services designed to meet the needs of veterans and their families. Our mission is to serve veterans with compassion and advocate for all who have worn our nation's uniform so they can RISE and live life to the fullest. Through the generosity of the community, all these programs and services are provided free-of-charge.

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# Outsource Accounting & Finance

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Laura needed additional resources to support the accounting team, who were consumed with other departmental responsibilities. “We couldn’t afford to hire a Director of Finance who possessed the skill level we were looking for. Our previous efforts weren’t meeting our needs. We needed a company that could take our financial operations to the next level.” She also wanted to partner with a vendor who tailored its software to the unique needs of nonprofit organizations.

### Solutions

The VOC hired The Bonadio Group to assume the role of outsourced CFO and implemented Sage Intacct, a cloud-based accounting platform that proved to be the ideal solution. Upon implementation, the VOC realized significant time savings and efficiencies in all transaction cycles. It also allowed the VOC to gain valuable insights with push-button access to real time customized reports.

A direct link was created from Bill.com to Sage Intacct. This action completely revamped the AP process and allowed access to bill approval via the web. The VOC also established a link from their Flag Store POS system directly into Sage Intacct via the open Application Programming Interface (API) structure. Now, when a sales transaction is completed, it is automatically uploaded into Intacct.

“The transition to Sage Intacct was very smooth”, says Stradley. “The Bonadio Group coached our staff through every step. Since the transition in 2019, they have been our subject matter experts, adding skill competency and accuracy to our finance department. They also coach our controller and bookkeeper on best practices and are a valuable liaison to our Board, especially for monthly close reporting and implementing our annual budget. Our reports have significantly improved. What’s more, we now have enhanced connectivity between our programs and finances. As a result, we have more accurate forecasting.”

**“Hiring Bonadio and moving to their outsource model was one of the best decisions I’ve made over the last two and a half years!”**

*Laura Stradley—Executive Director,  
Veterans Outreach Center*

### Results

The Bonadio Group has helped the VOC gain new insights on ways to deliver services to area veterans more effectively. For the first time, departments have dashboards that drill into data on demand. Process automation provides significant time savings, eliminating 20 hours of manual accounting work monthly and cutting monthly close time by 30%. As a result, department teams can work on more strategic initiatives. Departments have regained confidence in financial reporting, facilitating improved relationships between advancement and finance.

“We are extremely pleased with the skills and dedication of The Bonadio Group. Our consultant works with our leadership team and their individual departmental budgets, stays through all finance committee and full board meetings and has provided guidance on banking and investment decisions among many other things. Hiring Bonadio and moving to their outsource model was one of the best decisions I’ve made over the last two and a half years!”

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