

## Success Story

# Georgetown Visitation Preparatory School looks to modernize financials with Sage Intacct



“We saw a huge difference in how much easier it was to use Sage Intacct’s reporting and analysis capabilities.”

### Roberta Hopkins

CFO, Georgetown Visitation Preparatory School

Georgetown Visitation Preparatory School is a 200+ year-old private Catholic high school in Washington D.C. In recent years, its accounting team recognized that they could better serve families by modernizing operations through a new financial solution. Previously, the team had struggled to keep up with billing and other processes because of their rigid on-premise Blackbaud Financial Edge system, which was never in sync with the organization’s other applications.

The school used FACTS for tuition payment services; Blackbaud’s Raiser’s Edge for fundraising and donor management; and Veracross for managing administrator, teacher, student, parent, and household contact information and student enrollment data.

It took significant manual work and data re-entry to keep these silo’d systems up-to-date. The finance team was also downloading data from Financial Edge into Excel and then tediously creating financial statements for its Board of Trustees, and wanted an easier way to prepare reports. Georgetown Visitation turned to its consulting partner Brittenford Systems, who recommended a switch to the Sage Intacct’s best-in-class cloud ERP software.

### Key Outcomes

- Saved 85 hours per month with seamless integration and easier reporting
- Reduced monthly close by 5 days
- Improved organization-wide accountability



### Organization

Georgetown Visitation Preparatory School

### Location

Washington, DC

### Industry

Nonprofit

### Sage Products

Sage Intacct



**Georgetown  
Visitation**  
PREPARATORY SCHOOL

### About Georgetown Visitation Preparatory School

Georgetown Visitation Preparatory School is rooted in the Roman Catholic faith and committed to educating young women from diverse backgrounds. The school enrolls nearly 500 students in the ninth through twelfth grades.

### **Accounting automation improves customer relations**

With Brittenford's help, the school was up and running on Sage Intacct in just two months. Brittenford also implemented its billing and integration suite, SchoolConnect, which enables Georgetown Visitation to manage all financial and operational data within Sage Intacct. This eliminates the manual work of integrating student management and tuition payment systems, which Hopkins estimates was 50% of one employees' workload. Now, tuition payments, address changes, email address changes, donations, etc. are all synchronized, and the accuracy of the school's financial data has improved. By integrating Bill.com with Sage Intacct, Georgetown Visitation has been able to dramatically streamline its Accounts Payable process as well.

In addition, Sage Intacct helped the school speed its monthly close by nearly a week and greatly streamlined financial reporting. "Since we couldn't prepare consolidated financial reports in Financial Edge, we used to spend at least six hours every month on Excel manipulation, and often even more time fixing mistakes," commented Hopkins.

"But with Sage Intacct, we're able to instantly produce over 100 financial reports at any time – including consolidated reports across our operating fund, plant fund, and capital campaign fund, as well as reports for each individual entity, department, project, grant, and endowment."

### **Greater project and departmental visibility drives accountability**

For the first time, Georgetown Visitation can easily track spending for both student-funded and school-funded projects. With Sage Intacct's dimensionbased General Ledger, the school has improved project estimates and can more accurately determine its fundraising and development needs. For example, the team has gained an accurate view into expenses for its biggest annual event – graduation. "Before Sage Intacct, we had been coding all graduation-related expenses under a general admin account, but when we started tagging them with the project dimension, we found out that we were actually spending nearly three times the amount we had estimated," said Hopkins. "With this transparency, we can make more informed decisions as we start next year's graduation planning."

The finance team used Sage Intacct to build trend reports that show each department and functional area what they're spending each month. Rather than people from 40 different departments coming to the finance team to request printed reports for their own part of the business, all managers now have this information at their fingertips, and can quickly make corrections when needed. Board reporting is also greatly improved. "With clear visibility into all our data in Sage Intacct, we can easily show our board things like yearover-year comparisons, along with specific details and reasoning in each category where there's any variance," mentioned Hopkins. "This brings peace of mind and confidence in our data."

"Sage Intacct has been the perfect solution for our needs, and the mindset across our organization has completely changed since we made the switch. Now everyone has visibility into their spending and knows immediately if their budget starts to go negative, so there's real ownership by department managers," concluded Hopkins.

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