

CASE STUDY

Human Services Nonprofit Turns Efficiency Gains into Greater Compassionate Care

Hope Haven



Challenges

Replacing 20-Year-Old Finance System to Scale Reporting

Hope Haven is an accredited resource for disability services and advocacy in the Midwestern United States. Over the past 50 years, the nonprofit organization expanded from its roots as a school for children with disabilities into various programs that also nurture independence for adults and families struggling with behavior disorders, disabilities, and mental illnesses. In addition to intellectual, residential, vocational, and spiritual services, Hope Haven's international ministries have delivered more than 129,000 wheelchairs to people in over 100 countries.

After a recent period of rapid expansion, the organization's finance team realized it was time to retire their decades-old ERP system from HarrisData. The server-based software was heavily customized, so it required constant IT upkeep and didn't integrate with other systems. Its user experience was hindered by slow performance and minimal reporting functionality. All of this created a major burden—wasting people's energy on manual data entry, fixing errors, and Excel workarounds. Hope Haven clearly needed a better way to meet its increasingly complex financial, management, and government reporting requirements.

After migrating to Sage Intacct's cloud-based financial management software, Hope Haven realized significant business value, including a \$20,000 increase in net income, 15% greater cash flow, 30% more accurate (and 75% faster) reporting, and a 60% shorter monthly close.

Solutions

Modern Financial Workflows Cut Reporting Time 75%

By deploying Sage Intacct, Hope Haven dramatically improved productivity for not only the finance team, but its managers, who no longer have to rely on spreadsheets to manage staff utilization and efficiency information. The system's automated processes proved especially valuable as the organization continued its growth—increasing its location footprint, employee headcount, and overall budget—while enjoying a finance team efficiency improvement of at least 25%. "People who used to spend their time entering vast amounts of AR or AP data by hand are now able to branch out and help different departments," noted Dana Bakker, Hope Haven's controller. "By assisting with our caregivers' administrative work and other tasks that always got put on the back burner before, they are freeing those folks up to better serve our mission."

Using Sage Intacct, the team effortlessly manages all payables, employee expense reimbursements, fixed assets, and allocations across two entities, 80 locations, and 8 programs



Company Overview

Over 50 years ago, [Hope Haven](#) opened its doors as a school for children with disabilities in Rock Valley, Iowa. Since then, the organization has expanded its service programs and support to meet a broad range of needs for children, adults, and families—from community living, to employment services, day habilitation, mental health and recovery, religious services, and international ministries that deliver wheelchairs to people in need around the world.

Executive Summary

Previous Software:

- HarrisData

Results with Sage Intacct:

- Grew net income \$15,000 in just months
- Improved cash flow 15%
- Reduced budget variance 5%
- Slashed report preparation time by 75% and boosted reporting accuracy 30%
- Sped monthly close cycle 60%
- Increased finance team efficiency 25%

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Their monthly close has dropped from ten days to just four, and they easily prepare cost reports for the state to demonstrate exactly how their funding is spent. By leveraging Sage Intacct's real-time visibility into daily transactions, the organization even trimmed its budget variance by 5% and increased cash flow around 15%.

Some of Hope Haven's biggest time savings came from eliminating the task of manually copying monthly totals from other applications into the ERP system, which used to take a full week. Now, Bakker spends just minutes uploading detailed data from their timekeeping and receivables software into Sage Intacct, which instantly allocates the income and expenses across relevant programs or locations for more granular tracking. Overall, Bakker estimates that Sage Intacct's powerful capabilities slashed report preparation time by 75% and reduced the time and cost of the organization's audit by around 20%.

Results

New Operational Insights Boost Net Income

All of this automation, along with Sage Intacct's multi-dimensional general ledger structure, helped Hope Haven improve reporting accuracy by 30%. The finance team can slice and dice financial, operational, and outcome metrics by each individual location, as well as by employees, clients, or programs. For example, they built statistical reports in Sage Intacct to closely monitor employee utilization and benchmark each manager and location against the organization's 75% efficiency goal.

"It's been great for our managers to have Sage Intacct dashboards where they can see who on their team is performing very well, so they can make sure to acknowledge them, but also notice who's not billing out as many hours with clients," mentioned Bakker. "After reviewing some macro efficiency data, our managers actually adjusted certain people's routes, so they could spend more time with the people we serve, and less time in their cars driving from home-to-home. In just a couple months, that one operational change increased net income by \$15,000."

Additionally, the team built a service unit dashboard in Sage Intacct to track average state reimbursement and expenses (including employee wages) for each hour of client support delivered across specific locations and payers. This helps management better predict shortfalls, spikes, or other trends and react quickly, perhaps by making a case for rate changes. Finally, since the finance team can focus on deeper analysis, collaboration, and education across the organization, they provide Hope Haven with key insights for running a highly efficient operation.

"Sage Intacct is our one-stop-shop where we see not only the organization's financial information, but statistical details like income and expenses per constituent as well. One thing that's been really helpful for us is Sage Intacct's personalized dashboards, where each manager, executive, and finance team member can get the information we need in one place and drill down to explore the data as needed."



Dana Bakker,
Controller, Hope
Haven

sage Intacct



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