

Parish Drives 22% Increase in Donations with Sage Intacct

St. Columba's Episcopal Church



Challenges

Modern Financial Software and Services Help Optimize Operations

Located in northwest Washington, D.C., St. Columba's is an Episcopal Parish with about 600 active households and annual donations of over \$2 million. The Parish has an annual pledge campaign to raise unrestricted funds for operations and mission, while also receiving certain restricted gifts for certain outreach programs and capital projects. Fundraising for youth ministry pilgrimages and facility use fees round out its annual revenue stream. Its previous accounting technology — a combination of Adagio server-based software and complex spreadsheets — made it difficult for the finance team to report on how funds were used, let alone properly steward the Church's finances.

After falling behind on annual audits, the Church recognized it was time to make a change and brought in a team from Chazin & Company. The Sage Intacct Accountants Program partner conducted a full assessment of St. Columba's financial operations and recommended specific next steps to revamp the Church's processes. Chazin & Company streamlined the Church's chart of accounts, reconfigured its instance of Sage Intacct, and provided outsourced accounting services to support its financial management needs.

As a result, St. Columba's saved \$150,000 per year on finance-specific expenses, improved finance efficiency by 70%, shortened its monthly close by 50%, and improved donor trust through timely, accurate reporting — increasing contributions by 22%.

Solutions

70% Improvement in Finance Efficiency

Chazin & Company helped simplify the Parish's finance workflows and supplemented its internal team with greater nonprofit accounting expertise, greatly improving their overall productivity. A senior accountant at Chazin & Company now handles St. Columba's financial close and produces a full monthly reporting packet out of Sage Intacct in half the time. Meanwhile, the Church's part-time staff can easily enter all day-to-day transactions using the intuitive system.

Chazin & Company also integrated Sage Intacct with other key systems, such as Bill.com for accounts payable automation, Martus Software for budgeting, and Realm for donor management. Rather than tediously pulling year-to-date financials for each department to develop budgets, each stakeholder can now enter their targets directly into Martus where year-to-date data is updated nightly. Budgets finalized in Martus are then pushed into Sage Intacct for budget-to-

ST. COLUMBA'S EPISCOPAL CHURCH

Company Overview

St. Columba's is an Episcopal Church in northwest Washington, D.C. with about 600 active households and annual donations of over \$2 million. Originally founded in 1874, today the Church participates in community outreach and runs various initiatives around homelessness, racial injustice, refugee needs, and climate change.

Executive Summary

Previous Software:

- Adagio

Services from Chazin & Company:

- Monthly reconciliations and financial statements
- Treasurer and parochial reporting
- Ongoing finance analysis and counsel

Results with Sage Intacct:

- Saved \$150,000/year on finance support costs
- Improved efficiency of finance operations by 70%
- Achieved 50% faster monthly close cycles
- Increased contributions 22% as a result of improved donor trust
- Provided donor assurance that helped raise funds to repair Church facilities during COVID lockdowns

PARISH DRIVES 22% INCREASE IN DONATIONS WITH SAGE INTACCT

actual reporting. The Church's finance team also pulls cash receipts for all donor contributions directly from a report in Realm, and batch loads it to Sage Intacct as a simple journal entry — streamlining a previously manual process that took a full-time staff person 40 hours a week.

With all of these best practices in place, St. Columba's estimates the Church saves \$150,000 per year in finance-related expenses, due primarily to shrinking a four-person in-house team down to just a Director of Finance and Administration and a part-time accounting person. The rest is automated in Sage Intacct or outsourced to Chazin & Company. "As a result of our cost savings, we were able to make more mission-driven investments," explained Ledlie Laughlin, the Rector at St. Columba's. "For example, we've hired a full-time Missioner for Community Engagement to support family homelessness initiatives, and invested in video services for remote sermons during COVID-19."

Results

Financial Transparency Earns Donor Trust; Helps Raise Much-Needed Funds

St. Columba's replaced its previous spreadsheet-based financials with robust, automated reporting in Sage Intacct. The Chazin & Company team uses the system to produce the Church's Statement of Financial Position and Statement of Activities each month, including helpful charts and variance explanations — giving members an at-a-glance view of the Church's finances. They also consolidate the Church's two entities for annual parochial reports and high-level quarterly oversight by its governing body.

Chazin & Company also used Sage Intacct to create a net asset roll-forward, fund balance report, and department dashboards. These capture year-to-date financials for all unrestricted, donor restricted, and board designated funds. This insight has been instrumental for various internal stakeholders who previously had to wait for this information to be collated manually. By using Sage Intacct's dimensions to apply expenses to various ministries, the Parish now has better visibility into the true costs of those efforts.

The robust reporting helps improve the Church's budget awareness, management, and compliance. "Previously, budgets were more of a black box, but Sage Intacct enables us to collaborate and gives us greater transparency into general, designated, and restricted funds so our department heads have the confidence to make timely spending decisions," Laughlin noted. "We can view real numbers in real time, which is a huge advantage when running a Church like this."

The biggest impact of this finance journey has been increased donor trust. Laughlin said, "Before, there was hesitancy about donating to the Church until our financials were audited and cleaned up. In the first year after working with Chazin & Company we saw a 22% increase in pledge revenue. Our Director of Stewardship incorporated financial accuracy and transparency into the campaign, resulting in donor trust and willingness to give more."

He continued, "Another example of this was we were able to bring in \$2 million in donations to renovate the Church's nave and sanctuary worship center during pandemic closures. If our new financial systems and processes had not been in place, we wouldn't have been able to raise that kind of money."

"With Sage Intacct, our donors can see that we use the money the way we say we're going to. Being very transparent with our financials has greatly increased donor trust and made a direct impact on our fundraising."



Ledlie Laughlin,
Rector, St.
Columba's

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