

Sage ERP X3 | Case Study

Sage ERP X3 Keeps Camp for Disabled Kids Running Smoothly

When a smiling thirteen-year-old girl with multiple sclerosis floats by in the swimming pool at The Woodlands camp, Peter Clakeley smiles too. Clakeley is the executive director of The Woodlands Foundation, and it's his job to keep the children happy by keeping the camp for disabled children operating.

Clakeley knows that for a nonprofit foundation to stay afloat these days, it has to be run like a business. A small nonprofit has complex accounting and reporting requirements, so it needs financial software with big business power, but at small business costs.

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

After comparing several products, the Woodlands Foundation installed Sage ERP X3 enterprise software as its new financial backbone.

The Woodlands Foundation operates The Woodlands, a forested residential camp in Wexford, PA, that offers outdoor activities, games and arts education to children and young adults with a variety of disabilities. Founded in 1984 by the Spina Bifida Association of Western Pennsylvania, The Woodlands first served spina bifida patients exclusively, but now provides fun and fitness to kids with muscular dystrophy, multiple sclerosis, sickle cell anemia and many other debilitating conditions. To date, The Woodlands has hosted over 1,400 people from 13 different charitable groups.

After being spun off from the Spina Bifida Association 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.

"The multi-dimensional features of Sage ERP X3 allow us to easily capture data and create virtually any financial report we want in any format."

- Peter Clakeley
Executive Director
The Woodlands Foundation

Sage delivers flexible, easy-to-install business information systems to mid-sized companies with revenues in the \$10 to \$500 million range. The full Sage ERP X3 package integrates all the functions of business operations into one comprehensive system that provides seamless information flow throughout a company. Because Sage ERP X3 consists

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of separate modules for functions such as finance, budgeting and analytical accounting, sales order management, purchasing and inventory control, and manufacturing planning and execution, it is easy for a customer to select and install only the right software capabilities for the job at hand.

The Woodlands Foundation connected with Sage through the Spina Bifida Association, because one of its former employees had a son diagnosed with spina bifida. It was through that association that the Foundation discovered Sage could provide accounting software that was both sophisticated and cost-effective.

After analyzing its current technology and its needs, the Foundation presented Sage with its list of requirements for the new software:

- Make up-to-date financial information available in real time
- Reduce the time needed to close the monthly and annual books
- Facilitate financial reporting to multiple parties, including the board of directors and contributors
- Consolidate all the financial tools into a single system
- Integrate with the Foundation's existing information technology

The answer was Sage ERP X3 financial modules, with accounts payable, accounts receivable and general ledger functions. Built-in report generating capabilities gave the Foundation the power and flexibility it demanded.

"The decision-support system was another major reason we selected Sage ERP X3," said Clakeley. "Our reports are timely and accurate, thanks to the software's automation features."

Installation of the Sage ERP X3 system at The Woodlands Foundation took about three months. Sage and the Foundation worked together to ensure that the financial modules were fully integrated into the Foundation's information technology system.

After a short pilot phase, the Sage ERP X3 system went live in January of 2001. The system's performance has impressed the Foundation enough that it is considering adding a fourth module, inventory management, to track the purchasing of supplies and equipment for The Woodlands camp.

The Woodlands continues to expand from its beginnings as a summertime recreational and therapeutic facility. As the camp's excellent, year-round programs and charming 32-acre site attract an ever-growing number of children (many of whom remain campers "for life"), its fund-raising, financial management and reporting needs also will expand. The Sage ERP X3 system's scalability will enable it to continue as the financial nerve center of The Woodlands Foundation, satisfying board members, contributors, regulators and above all, campers.

Headquarters
Wexford, PA

Industry
Non-profit camp for disabled children

Sage ERP X3
Licenses
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