

Community Services Consortium Achieves Success with RBP Methods and Sage 100 Fund Accounting

SUCCESS STORY

The Challenge

Community Services Consortium was operating their Community Action Agency with a multi-million dollar budget, over 120 employees, and more than 200 grants on a legacy system. As time and technology advanced, they realized their system was not going to meet their needs long term.

The Solution

CSC partnered with RBP Methods to implement Sage 100 Fund Accounting, provide training for their staff and ongoing support services.

The Result

CSC is thrilled with the new software configured to meet their specific requirements, as well as with the outstanding, friendly and trustworthy support provided from RBP Methods.

Community Services Consortium (CSC) was established in July, 1980, and serves as a nonprofit community action agency in the Linn, Benton and Lincoln counties of Oregon. CSC is responsible for the development, management and provision of various programs and services supporting low income families and individuals. Seeking to help those they serve to overcome the causes and conditions of poverty, CSC provides job search and training, food banks, energy assistance and education, emergency housing assistance, weatherization services, self sufficiency programs and more.

An Accounting System Showing Signs of Wear

With a multi-million dollar budget, over 120 employees, and between 120 and 240 grants, one can imagine the complex accounting requirements experienced by CSC. Not only do they need to comply with nonprofit and fund accounting standards and laws, but they need a reliable system with extensive reporting capabilities as well. For some time, however, they had been using a legacy system, custom built by a single programmer who they relied on to keep it functioning. As time and technology advanced, they began to realize that the system was not going to meet their long term needs. Debbie Jackson, CPA and CSC Finance Director explains, "We needed a fund accounting system that was more commonly supported, had regular updates, and the ability to be configured to meet our specific requirements."

RBP Methods Lights the Way to a Better System

After doing some research, CSC decided that Sage 100 Fund Accounting (formerly known as Sage MIP Fund Accounting) would be the right fit for their needs, so they contacted Sage, who put them in touch with RBP



Methods. Establishing trust right away, RBP Methods listened to CSC's desires and then presented them a detailed plan in regards to bringing bring the data over, creating the appropriate reporting, and finishing the implementation within the requested time frame.

As a partner who understands both accounting and technology, RBP Methods was able to communicate with the previous legacy system creator in terms they could understand and respect, thus smoothing the transition from one system and consultant to another. They then guided the implementation in a controlled and directed manner, helping CSC find and utilize resources in their own employees, thereby involving them in the process. "Thanks to RBP Methods' skills the implementation went very well," recalls Debbie. "I chose not to bring over any previous balances because I knew the other system had some issues and I didn't want any incorrect figures in the new system. RBP Methods helped us create and run a clearing account to ensure our numbers were correct when all was said and done." Kent Arnold, President of RBP Methods reflects on an enjoyable challenge during the implementation, "In the early 1980s, when CSC was formed, the nonprofit tax code was in transition. I found it interesting to learn that there was a period of time where nonprofit



“Thanks to RBP Methods expert recommendations, we have been able to save roughly \$50,000 a year! We greatly enjoy working with their team. Their extensive knowledge and humor gets us through the stressful times.”

www.csc.gen.or.us.org

Organization Profile

Type

Community Action
Agency

Region

Benton, Linn and Lincoln
Counties, Oregon

Employees

120 Employees

System Profile

Sage 100 Fund Accounting

General Ledger
Accounts Payable
Bank Reconciliation
Budgeting
Data Import / Export
Direct Deposit
Executive View
Forms Designer
HR
Payroll
Purchase Order
Purchasing and
Encumbrances

employees were given the option to opt out of paying Social Security taxes. In CSC’s case, some of their employees had taken advantage of this offer, which created a need to figure out a way to configure the system to handle both those who pay the tax, and those who do not. Ultimately we overcame the challenge in a relatively straight forward and simplistic manner, and it is now much easier for them to manage.”

Once the implementation was complete, RBP Methods provided the CSC staff with the training they needed to make their new system a success. “The team at RBP Methods is not only knowledgeable, but they present information in an enjoyable way that different levels of users can understand,” mentions Debbie. “From people on the front line doing accounts payable, all the way up to the Executive Directors, Kent has a quirky way of looking at things that communicates so well with all of us.” Kent adds, “The training process was made even more successful in this instance because CSC’s staff was ready and eager for change. They caught on really quickly to what the system was doing and how it was set up.”

A Bright Future for CSC

Throughout their business partnership, CSC has been continuously impressed with RBP Methods and is confident that they will always have their best interests at heart. A great example of this commitment was when the team at RBP called to tell them a new module, Executive View, was coming out and they thought it would be a good

fit. Debbie remembers, “They couldn’t have been more right. Executive View took what was formerly a time consuming and frustrating bottleneck of information and streamlined it so that each of our managers can review their own data in the system. It has likely kept us from having to hire an additional accounting professional, saving us roughly \$50,000 a year!”

What’s more, CSC is thankful to have a technology partner they can rely on in an emergency. Debbie reflects on an example of this. “I had run into an issue with a complicated payroll process and couldn’t get it to work. I was about a half a day from having to either push the button on payroll, or re-do a tremendous amount of work the next day. I sent RBP Methods an email for *HELP!* Not an hour later Kent called me back...and I’ll never forget what he said...*‘First, take a deep breath- I’m not going to get off the phone with you until I have your problem fixed. It’s going to be okay...now let’s get started...’* and that was exactly what I needed to hear. We always receive a whole hearted response like this from everyone in their organization. As the only CPA on staff, I don’t have anyone to ask of the questions that are stumping me and I am thankful that I can call on RBP Methods. On top of a really great product with the flexibility we need, their team has provided support with extensive knowledge and humor that gets us through the stressful times and we greatly enjoy working with them.”

RBP Methods is a consulting company helping nonprofit and governmental agencies sort through complex technical decisions by providing quality services and products either directly or through our wide network of associated firms. We offer a variety of services for organizations facing technology changes.

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