

## Case Study: BudgetEase's Bookkeeping Practices Support the Accelerated Growth at Not-for-Profit Focusing on Community Building

*Interview with Operations Director*

**Q: How did you find BudgetEase?**

A: My banker recommended some accountants to me. One of the accountants recommended BudgetEase. At the time BudgetEase was perfect. BudgetEase was very reassuring and made me feel comfortable.

**Q: What differences have you found transitioning from in-house to outsourced bookkeeping?**

A: We are a fast growing, lean, not-for-profit. Keeping up with our growth is challenging. We can't afford a CFO and don't have in-house financial expertise. BudgetEase is a good solution for us to get the bookkeeping skills we need to keep up with our growth.

“ BudgetEase was very reassuring and made me feel comfortable.

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**Q: What financial information is so important that you look at it every week?**

A: Project analysis. We can see the total cost of each project. This information is important to prepare our budget.

**Q: What financial information do you wish you had that you currently don't receive?**

A: An easier way to collect expense account reporting.

**Q: What is the biggest challenge for your business?**

A: Right now, strategic planning and keeping up with the evolution of our mission.

**Q: What has been the impact of the relationship with BudgetEase?**

A: BudgetEase's assistance has benefited us in many ways. We have clear and accurate financial reporting. BudgetEase has implemented a process to allocate our payroll to each project. Our funders use the budgets we are now able to create by project. For the first time, I was able to save considerable time by filing our 990 based on the information in QuickBooks without any additional adjustments in Excel.

“ Use BudgetEase from the start and don't bother doing it yourself.

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**Q: How do you like working with Elizabeth, your BudgetEase Consultant?**

A: I appreciate Elizabeth's willingness to do whatever needs to be done. If she can't figure out a way to solve a problem, she takes it home to work on it or does research. She always delivers a solution.

**Q: If you could tell another small business like yourself of the value of your relationship with BudgetEase, what would it be?**

A: I would suggest they use BudgetEase from the start and not bother doing it themselves. BudgetEase provides an affordable solution for keeping accurate financial records. Use your accountant for the big picture – BudgetEase takes care of the nitty gritty details.

**Q: Would you refer BudgetEase to others?**

A: Absolutely.

“ BudgetEase provides not-for-profits an affordable solution for keeping accurate financial records.

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