

Success Story

Doing more good with less admin

How The Jewish Board saves a full workweek each month with Sage Intacct

“Sage Intacct makes our work more focused and efficient. It frees up our time and energy to better support the people and programs that need us most.”

Rafeena Rahaman

Director, The Jewish Board of Family and Children's Services



The challenge

The Jewish Board needed to move off its aging legacy system—and the finance team saw an opportunity to do more than just modernize infrastructure. With over 100 programs, complex allocations, and demanding reporting requirements, they wanted to simplify operations, automate time-consuming tasks, and deliver better insight across the organization.



The solution

With help from a trusted Sage business partner, The Jewish Board implemented Sage Intacct in 2017—customizing the platform to support nonprofit reporting, automate fringe and overhead allocations, streamline invoice generation, and replace paper-based purchasing with a modern, cloud-based system.



Results with Sage Intacct

Sage Intacct gives The Jewish Board greater control, faster reporting, and more time for strategic work.

- Saving five+ days each month on allocations and invoicing.
- Cut audit prep time with integrated documentation.
- Allows program managers to enter and track purchases directly.
- Seamlessly doubled the number of tracked allocations to improve cost reporting.
- Powers faster, self-service reporting across 100+ programs.
- Scales with organizational growth without increasing finance headcount.

Sage

Organization

The Jewish Board of Family and Children's Services

Location

New York, US

Industry

Nonprofit

Sage Products

Sage Intacct



**The
Jewish
Board**

About The Jewish Board of Family and Children's Services

The Jewish Board of Family and Children's Services is one of New York's largest and most impactful nonprofit mental health and social service organizations. Each year, it supports over 45,000 individuals through a network of programs ranging from mental health counseling and supportive housing to early childhood services, substance use treatment, and services for people with developmental disabilities.



Meeting complex needs with clarity and care

The Jewish Board is one of New York's most impactful nonprofit mental health and social service organizations, supporting more than 45,000 individuals each year across the five boroughs and beyond. With over 100 programs, over 3,000 employees, and services ranging from supportive housing to counseling, family services, and developmental support, the organization's operational complexity is as expansive as its mission.

For Rafeena Rahaman, Director at The Jewish Board, finance plays a vital role in helping programs and leadership operate with confidence. "It's about giving our teams the information they need to stay on track—and helping leadership make timely, informed decisions that move the mission forward," she says.

As a \$250 million nonprofit with complex funding structures and citywide reach, The Jewish Board needed a modern, cloud-based financial system that could simplify operations, increase transparency, and support smarter decision-making. Rafeena and her team chose Sage Intacct—with guidance from a trusted Sage business partner—to deliver exactly that.

Moving to the cloud—and getting more than expected

Before moving to Sage Intacct in 2017, The Jewish Board ran its financials in a legacy application, Lawson (now part of Infor), hosted on internal servers. When the software provider shifted

to a cloud platform, Rafeena and her team took the opportunity to explore other modern, cloud-based alternatives.

They evaluated Infor, NetSuite, and Blackbaud alongside Sage Intacct. The deciding factors came down to flexibility, nonprofit focus, and the ability to address The Jewish Board's most time-consuming challenge: allocations. "Our organization has a lot of complex allocations—fringe benefits, administrative costs, shared salaries across multiple programs," says Rafeena. "It was a huge manual effort every month. We needed a system that could make that easier—and let us do more."

Their Sage business partner introduced them to the Sage Intacct Advanced Allocations module to support its complex allocation requirements and to automate invoice creation based on specific program funding rules. Implementation started in early 2017 and went live seamlessly by July 1.

Automating what matters

One of the most significant operational shifts was replacing an entirely paper-based purchasing process with an integrated, cloud-based system. "Before, everything was mailed or emailed—manual forms, manual approvals," Rafeena recalls. "Now, it's all electronic. Program managers can approve purchases remotely, and everything moves faster." The shift allows program managers to enter their own non-





Sage Intacct saves The Jewish Board a full workweek each month on allocations and invoicing—time it can use to focus on more strategic tasks.

purchase order invoices, lightening the load on the accounting team and improving turnaround times. “We’re putting the task where the knowledge lives,” says Rafeena. “And it’s made us more responsive, more accurate, and more efficient.”

That’s just one example. The Jewish Board also added a custom invoice module in addition to the Advanced Allocation engine—transforming what used to be days of manual work into a few automated clicks. “I used to spend two to three days a month on allocations alone,” Rafeena says. “Now it’s done automatically. My supervisor saves another two days with the expense reimbursement invoicing automation. Together, that’s a full workweek saved—every month.”

These time savings don’t just reduce stress—they allow the team to take on more meaningful tasks, improve controls, and stay ahead of deadlines.

Better visibility, better decisions

Financial clarity is essential with more than 100 programs and 200 departments to track. Before Sage Intacct, reporting was slow, heavily Excel-based, and hard to scale. Now, custom reports can be generated in minutes, with real-time drilldowns and a clear audit trail. “We used to have to download and send everything to board members and program managers manually,” she says. “Now they log in and find what they need—right down to the invoice backup.”

Thanks to the Sage Intacct dimension feature, the organization can now track activity by program, location, department, fund, event, lease, and job code—all without adding complexity to the chart of accounts. That dimensional flexibility also supports annual state reporting, such as the Consolidated Fiscal Report (CFR), essential for securing reimbursements.

“We use custom fields to tag accounts to CFR line items,” Rafeena explains. “That used to be a very difficult, manual process—but Sage Intacct makes it much easier.”

Supporting growth—without adding complexity

Since moving to Sage Intacct, The Jewish Board has grown steadily, adding staff, expanding programs, and increasing its annual budget to \$250 million. But thanks to automation, improved reporting, and custom workflows, the finance team has kept pace without needing to scale headcount at the same rate.

The Advanced Allocations module alone has allowed the team to double its number of tracked allocations—from 50 to over 100—improving reimbursement accuracy and ensuring compliance with government contracts. “It used to be too time-consuming to break things down this far,” says Rafeena. “Now we can be more precise, which helps with state reporting and audit documentation.”

Smarter audits, simpler compliance

The benefits extend to audit readiness as well. With supporting documents attached electronically to transactions and journal entries, auditors can access what they need directly within the system—no more chasing paper trails or exporting reports. “They still need a lot,” Rafeena adds with a laugh, “but they



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Director, The Jewish Board

don’t need as much from us. They can do more of the work themselves, which saves everyone time, and it shortens our audit cycle significantly.”

That same structure supports compliance with state and federal funding sources, including Medicaid and various grants, where documentation and transparency are essential.

Looking ahead

The Jewish Board is now working to implement the cash management capabilities in Sage Intacct, which will bring in daily bank transactions, automate reconciliations, and automate cash flow visibility. “Right now, we only record daily cash at month-end,” Rafeena says. “This will be a big shift, giving us near real-time access to our cash holdings. It’ll save even more time and give leadership a clearer picture every day.”

For a mission-driven nonprofit navigating complex funding and a growing demand for services, that kind of insight isn’t simply nice to have—it’s essential. “Sage Intacct makes our work more focused and efficient,” Rafeena concludes. “It frees up our time and energy to better support the people and programs that need us most.”



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