

YPTC SOCIAL SERVICE SPECIALIZATION

CASE STUDIES: HOW YPTC SUPPORTS SOCIAL SERVICE ORGANIZATIONS



AT YPTC, our mission is to help as many nonprofits as possible grow stronger. Social services organizations are on the front lines of addressing complex community needs, often while navigating diverse funding sources, evolving compliance requirements, and limited internal capacity. Through our customized and flexible financial management services, we have supported thousands of social services organizations to strengthen their accounting, grants management, internal controls, and financial reporting.

CASE STUDY: FINANCIAL INFRASTRUCTURE FOR GROWING NONPROFIT EQUIPPING A SENIOR SERVICES ORGANIZATION TO SCALE WITH CONFIDENCE

THE CLIENT

A LONGSTANDING SENIOR SERVICES NONPROFIT supporting vulnerable older adults. Operating on a modest \$500,000 budget and funded primarily through donations, the organization had limited staff capacity, minimal accounting infrastructure, and no experience managing federal awards. To address growing community needs, they were planning to acquire a day center that would expand their annual budget to over \$3M. This expansion would dramatically increase programming, diversify revenue, and bring new federal funding into the mix.

THE OPPORTUNITY

- **INTEGRATING** federal grants and fee-for-service revenues into their existing, contribution-only revenue model
- **ESTABLISHING** internal controls appropriate for a multimillion-dollar operation
- **REDUCING** the administrative burden on staff who had little accounting or grants management experience
- **ENHANCING** both the financial reporting system and the underlying processes to better support board oversight and long-range planning

OUR APPROACH

- **FINANCIAL INFRASTRUCTURE ASSESSMENT:** Evaluated the organization's accounting structure, chart of accounts, internal reporting needs, and readiness for federal grant compliance.
- **SYSTEMS IMPLEMENTATION:** Introduced REACH for consistent leadership reporting and BILL for automated accounts payable, improving accuracy, documentation, and workflow efficiency.
- **GRANTS MANAGEMENT SUPPORT:** Developed repeatable processes for federal drawdowns, cost allocations, reporting schedules, and documentation, along with coaching for staff new to grant administration.
- **ONGOING GUIDANCE:** Provided continuous budget-aligned support to ensure the sustainability of new systems, strengthening of internal controls, and reinforcement of financial best practices.

THE RESULTS

- **MODERNIZED FINANCIAL STRUCTURE:** A fully rebuilt accounting framework aligned with increased organizational complexity.
- **REDUCED ADMINISTRATIVE BURDEN:** Automated accounts payable and standardized reporting processes significantly decreased staff workload.
- **CONFIDENT MANAGEMENT OF FEDERAL GRANTS:** Clear systems and repeatable workflows turned major grants from a stressor into an asset.
- **ENHANCED DECISION-MAKING:** Leadership and the board received accurate, timely, and accessible financial information.
- **SUSTAINABLE REVENUE MIX:** Successful integration of donations, program revenue, and federal funding supported long-term stability.

THE IMPACT:

BY PAIRING FINANCIAL EXPERTISE WITH HANDS-ON SUPPORT, YPTC helped this nonprofit evolve from a small, donation-dependent organization into a financially stable, multimillion-dollar service provider. The organization now operates with stronger internal controls, sustainable grant management systems, and a financial infrastructure that matches the scale and importance of its mission.



CONTACT US with questions and learn more about our work with social service organizations at <https://www.yptc.com/social-service-specialization/>