

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: STRONGER FINANCIAL SYSTEMS FOR A \$10M+ MULTI-SERVICE NONPROFIT TRANSFORMING ACCOUNTING OPERATIONS FROM CRISIS TO CLARITY

THE CLIENT

A **LARGE, MULTI-SERVICE NONPROFIT** with a \$10M+ budget that provides comprehensive family and children's services primarily funded through government grants. Despite receiving clean audits, the organization's financial reports were not meeting the needs of leadership or the board. The finance department also had an urgent need for help following the departure of their outsourced six-person accounting team.

THE OPPORTUNITY

- **UPDATING** financial reporting processes that lacked clarity, continuity, and structure
- **IMPROVING** timeliness, interpretability, and decision-usefulness of reporting deliverables
- **INVESTING** in new financial systems that provide deeper insight and efficient functionality
- **REDESIGNING** the accounting team for internal capacity and sustainability

OUR APPROACH

PHASE 1: INTERIM ACCOUNTING DEPARTMENT & CRISIS NAVIGATION (FIRST SIX MONTHS)

- Stepped in as the organization's interim accounting department, giving leadership space to rebuild internal capacity
- Navigated the prior-year audit, ensuring all audit support and corrections were handled smoothly
- Managed the federal-award single audit and financial statement audit, coordinating documentation with external auditors and helping leadership understand compliance requirements
- Cleaned up and stabilized core processes (accounts payable, payroll allocations, and grant tracking), which were overly complex and had delayed grant reporting
- Trained and supported newly hired accountants through each phase of onboarding

PHASE 2: BUILDING SUSTAINABLE SYSTEMS (MONTHS 6-12)

- Built grant tracking systems to give leadership clarity on burn rates, allowability, and reporting timelines
- Introduced structured workflows such as a monthly workplan, standardized workpapers, a month-end calendar, and checklists to bring order and consistency to federal and state grant management
- Provided ongoing recommendations, adapting quickly to evolving needs and shifting priorities

PHASE 3: DELIVERING TRANSFORMATIONAL FINANCIALS (ONGOING)

Almost a year after the initial engagement, YPTC delivered the first complete, redesigned set of financial statements. Described by the client as a major “payoff moment,” these statements were:

- Clear, digestible, and aligned with how leadership makes decisions
- Structured by program and funding source
- Accurate, timely, and consistent
- Appropriate for both management and board-level oversight

THE RESULTS

- **STABILIZED CORE ACCOUNTING OPERATIONS** after years of outdated processes
- **CLEAR, DIGESTIBLE, AND TIMELY FINANCIAL STATEMENTS** that support stronger decision-making
- **REBUILT INTERNAL CAPACITY** with trained accounting staff
- **ACCURATE, CONFIDENT GRANT MANAGEMENT** for a large portfolio of complex federal grant programs, including appropriate internal controls
- **BETTER COLLABORATION BETWEEN FINANCE AND LEADERSHIP**, increasing confidence in the numbers
- **A CONTINUOUS IMPROVEMENT CULTURE** focused on strong processes, not just compliance

THE IMPACT:

BY TRANSFORMING FINANCIAL SYSTEMS to match the multi-service organization’s size and mission, YPTC stabilized operations, strengthened grant management, and delivered financial reporting that the organization could finally use with confidence. Today, the client maintains a continuous improvement mindset, building on the systems established with YPTC’s help to improve processes, support leadership, and ensure financial clarity well into the future.



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