

## SAGE MIP FUND ACCOUNTING

### CUSTOMER SUCCESS



## Eagles Peak Charter School Reaches the Top With Sage MIP Fund Accounting

Founded in 2000, Eagles Peak Charter School had a modest beginning with a single learning center, 15 children, and a set of parents who wanted to create a more supportive environment for their children's educations. Today, over 3,500 K-12 children receive their education by participating in one or more of the 27 academies and learning centers throughout four California counties. Eagles Peak strives to foster the innate curiosity of their students, empower parents, and promote optimum learning. By working collaboratively with parents, personalized learning programs involving core academics, independent study programs, and extracurricular activities are developed to help children aspire to his or her highest potential.

### Mountain of Reporting

The Charter School movement ramped up in California in 2001, bringing new state restrictions and increased reporting guidelines to Eagle Peaks' door. Regulations such as SB740 put tighter control on charter schools offering non classroom-based instruction (distance learning, home schooling, etc.) and determined how charter schools spend state funding.

Likewise, as the school's student population grew, employees were added, and reporting to the State Teacher's Retirement System (STRS) required a mountain of paperwork each pay period. Bryce Guthrie, controller for Eagles Peak, reflects on his first days at the school, "We had a lot of manual processes using spreadsheets and text files, like payroll and STRS reporting, that were not integrated with our previous accounting program. We found the software we were using just wasn't making the grade for the increased reporting, fund-processing, and payroll needs of a growing charter school."

### Customer:

**Eagles Peak Charter School**

### Industry:

Nonprofit; Primary & Secondary Education

### Location:

Vista, California

### Number of Locations:

27 Academies & Learning Centers throughout Imperial, Orange, Riverside, and San Diego Counties in California

### Number of Employees: 350

### System:

**Sage MIP Fund Accounting**

### Modules:

- Accounts Payable
- Budget
- Data Import & Export
- Direct Deposit
- Electronic Funds Transfer
- Encumbrances
- General Ledger
- Payroll
- Purchase Orders

### CHALLENGE

Manual spreadsheets and text files, coupled with non-integrated software, was not meeting the demands of strict reporting guidelines and needs of a growing charter school.

### SOLUTION

Sage MIP Fund Accounting as the core fund accounting solution, along with integration to third-party packages, for a fully integrated charter school accounting system.

### RESULTS

Automated processing and reporting, saving at least two days work per month, conserving money and resources. Became first direct-funded charter school to successfully transmit monthly retirement reports to County.

### Getting a Foothold With Sage MIP Fund Accounting

Eagles Peak investigated many options to fit their growing needs, including outsourcing some of their financial operations. “We decided to keep our financial needs in-house, since many of the vendors wanted to charge us a ‘per student’ rate. Outsourcing would have financially penalized us for attracting new students, as well as created delays in processing requests.”

Guthrie’s experiences with Sage MIP Fund Accounting software at a previous charter school made it a natural choice for Eagles Peak. “I knew it could automate many of our manual processes, and do everything from tax reporting to payroll, fund reporting and even limited HR, all in-house. It would allow me to handle requests and provide information quickly, with everything at my fingertips.”

### The Ultimate Base Camp

Guthrie’s relationship with a Sage Software Authorized Business Partner not only eased implementation of the Sage MIP Fund Accounting program, but opened the door for the integration of third-party systems to create the ultimate charter school accounting package.

“We can import our purchase orders in accounting code sequences specifically needed for charter schools reports called SACS (Standard Account Code Structure). This makes purchase orders easy to process and post, which is critical when you have thousands of students, each with a tailored curriculum and study materials. I can upload and process the hundreds of POs I need to manage daily in a snap!”

Along with PO processing, Guthrie’s school also has cracked the code in STRS reporting. “As far as I know, Eagles Peak was the first direct-funded charter school to successfully transmit monthly retirement reports to the Counties. We are set up to easily pull the correct payroll output needed by the Counties, saving me two days of work each month.”

*“Sage MIP Fund Accounting is the core of our specialized accounting needs. It saves valuable reporting time, in some cases two days, and helps me do all aspects of my job better.”*

—Bryce Guthrie

Controller  
Eagles Peak Charter School

### Reaching the Summit

What once was a mountain is now but a molehill in terms of managing the complex accounting needs of the charter school. “Sage MIP Fund Accounting is at the core of all our specialized fund accounting needs. It has an easy and logical workflow, and its unlimited amount of user define fields enables me to customize the program for our specific reporting requirements. We save valuable time and dollars by not outsourcing our accounting, and I can provide information quickly, including creating reports that include encumbrances or un-posted transactions.”

“I have had four years of experiences with Sage MIP Fund Accounting, including working with my Sage Software Authorized Business Partner and with the software’s customer support team—all of which has been positive. Sage MIP Fund Accounting allows me to do all aspects of my job better, and is very important to the success of our charter school.”

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