

HOLY FAMILY SCHOOL OF FAITH INSTITUTE

SUPPORTING STRATEGIES HELPED A RAPIDLY GROWING NONPROFIT WITH ALL ASPECTS OF BOOKKEEPING, CONTROLLER SERVICES AND FINANCIAL ANALYSIS

As it quadrupled its workforce and added a for-profit affiliate, this religious institution needed an experienced professional partner it could trust. Enter Supporting Strategies.

Client Profile

Founded in 2005, Holy Family School of Faith Institute (HFSFI) is a public association of the lay faithful. Based in Overland Park, Kansas, the institute “shares the fullness of Catholicism” through mentorship, pilgrimages, live events, audio Rosaries, podcasts, videos and more.

An Unsustainable Trajectory

As an independently funded 501(c)3 organization operating within the Archdiocese of Kansas City, HFSFI relies largely upon a network of donors. “And we have a strict obligation to spend their money wisely,” says Cari Hillyer, the institute’s Vice President and Executive Director of Operations.

With a background in business and technology, Hillyer assumed those obligations almost by default early in her tenure. “I came in at a time when the organization needed organization,” she says with a laugh. HFSFI was “kind of mom-and-pop” at that stage, with just four full-time staff members.

At first, Hillyer was able to keep pace with all of the bookkeeping and HR responsibilities. But by 2016, she realized that her workload was no longer sustainable. HFSFI had grown exponentially, peaking at 17 employees before settling at 15.

“The financial aspects of our organization became more and more complicated,” Hillyer notes. “And I was doing a lot of things with no cross-training from anybody else. So, you can imagine what would happen if I tried to go on vacation or something.”

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The Right Solution at the Right Time

Hillyer considered recruiting a full-time CFO, “but it would have been hard to justify hiring someone who was strictly a financial person at that stage.” She found the right-size solution when some mutual friends introduced her to Tom Ross, Managing Director of Supporting Strategies | Kansas City.

Supporting Strategies addressed Hillyer’s immediate need while also putting her mind at ease by implementing the appropriate bookkeeping best practices. “I think that’s even more essential for a nonprofit than a for-profit business because of the level of responsibility we have to our donors,” she says. “It’s important to make sure the books are in order so we can demonstrate that we’re doing things that make sense from a business perspective, but that we’re also being judicious with the way we’re spending money.”

Going Above and Beyond

Hillyer and HFSFI got more from Supporting Strategies than basic bookkeeping. “They’ve been teachers at times, walking us through various processes and explaining why we have to do things a certain way,” she says. “But they listen well, too. They have a really good grasp of why we need to report things a certain way for our board members to easily see value in what we’re doing.”

Among other things, Supporting Strategies helped HFSFI transition to the same payroll system that the archdiocese was using — and then shepherded the client through a subsequent change in vendors. Supporting Strategies also switched HFSFI to a new CRM system that enabled the automation of many tasks that had previously required manual input.

“That was a game-changer,” Hillyer says. “It allowed us to go from accepting donations more or less strictly in check form to being able to accept online donations very easily.”

Supporting Strategies also synched the CRM and bookkeeping software, which helped with the audit process, according to Hillyer.

“Supporting Strategies is super-reliable. They’re trusted in the industry, and it’s huge for us to have an industry leader operating our finances.”

*Cari Hillyer, VP, Executive Director of Operations
Holy Family School of Faith Institute*

Answering When Opportunity Knocks

In perhaps the greatest challenge, Supporting Strategies provided the necessary expertise when HFSFI added a for-profit subsidiary, a travel agency that arranged pilgrimages.

When the agent decided to retire, she asked Hillyer if HFSFI would like to take the agency in house. It was a great opportunity — provided HFSFI didn’t run afoul of IRS regulations. “Tom and his team were essential with helping us with the compliance aspect of that transition,” Hillyer says. “Because we’re a nonprofit and the agency was a for-profit business, there were some considerations involved that were outside my wheelhouse.”

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A Friend Indeed

As HFSFI continues to grow, it does so with the peace of mind that comes from having a partner to provide bookkeeping, controller services, financial analysis — and more. “Supporting Strategies is super-reliable,” Hillyer says. “They’re trusted in the industry, and it’s huge for us to have an industry leader operating our finances.”

In short, she concludes, “It’s the best business friendship you could have. It has so much integrity. I know it’s unusual to talk about ‘friendship’ in a business context, but that’s what it is.”

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