

Partnering for Impact: How Synergy Pathfinders Helped a Healthcare Nonprofit Build Sustainable Financial Practices

Client Overview

Sector: Nonprofit
Industry: Healthcare
Location: Massachusetts
Annual Revenue: Under \$1 mil

Background

A small healthcare nonprofit had been serving its community for several years but lacked adequate internal infrastructure to support desired financial management. Without a dedicated accounting professional on hand, the organization recognized the need for structured financial practices and sought external support to build internal capacity and improve organizational accountability and growth, with emphasis on establishing consistency utilizing a cloud-based accounting system, reporting more in-depth financial health status to the board, and building a reliable partnership with a trusted accounting professional.

Key Challenges

- Limited internal knowledge of accounting and financial reporting
 - Inconsistent and infrequent financial reporting to the board
-

The Solution

The nonprofit partnered with Heather Garland, founder of Synergy Pathfinders, to implement a comprehensive accounting services strategy tailored to its operational and mission-driven needs.

1. Accounting System Clean-Up

- Conducted a full review of prior-year records in QuickBooks Online (QBO)
- Corrected errors in general ledger coding and account classification
- Delivered accurate financial statements for tax preparation

- Redesigned the Chart of Accounts to improve the clarity and usability of financial data

2. Development of Policies and Procedures

- Reviewed and implemented accounting policies and procedures that aligned with nonprofit best practices
- Established internal controls to promote consistency and accountability in financial operations

3. Contractor Training and Capacity Building

- Provided targeted training for the deputy director on QBO functionality, bank reconciliations, and accounting fundamentals
- Introduced best practices to build long-term financial literacy within the organization

4. Financial Reporting Enhancements

- Designed customized financial reports tailored to the nonprofit's activities and funding structure
- Automated recurring report delivery to the board to support informed oversight and governance

5. Grant and Project-Based Reporting

- Enabled class tracking in QBO to support segmented reporting by project, grant, and funding source
- Improved transparency and compliance for grantors and donors

6. Ongoing Advisory and Oversight

- Conducted quarterly financial reviews to assess progress and identify areas for improvement
- Continued consulting support for ongoing financial questions and strategic planning

Results

- Enhanced confidence in the reliability of financial reporting
- Improved visibility into project-level and grant-specific financial performance
- Streamlined year-end reporting process, reducing delays and stress
- Achieved a 20% reduction in the deputy director's administrative workload, freeing time for mission-focused work

Client Testimonial

"Heather is incredibly knowledgeable, thorough, and reliable! We've been working with Heather for over 6 years, and in that time, she's been essential to strengthening our organizational accounting structure and financial record-keeping. Heather is just an email or phone call away, always there to answer our questions and address our concerns!"
— **September W., Deputy Director, Healthcare Nonprofit**

"Partnering with Heather transformed our financial management, giving us the clarity, confidence, and infrastructure we needed to sustainably advance our mission."

— **Chris M., Executive Director, Healthcare Nonprofit**

Ready to Strengthen Your Financial Foundation?

Contact Synergy Pathfinders today to learn how we can help your organization gain the clarity, structure, and support needed to thrive.