



THE CHARITY CFO

Client Impact Story



CLIENT SUCCESS STORY:
United Way Space Coast

INTERVIEWEE:
Emily Orndorff Chief Operating Officer



UNITED WAY SPACE COAST

Rebuilding Financial Clarity After Years of Inconsistency

The Challenge



United Way Space Coast is a long-standing organization with a big mission—but prior to partnering with The Charity CFO, its financial operations hadn't kept pace with its impact.

When Emily returned to the organization in 2023, she faced the daunting task of modernizing operations that had become deeply underinvested.

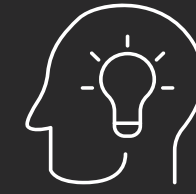
“We hadn't had consistent monthly financials in nearly 8 years,” she explained. “We had audits and quarterly reports, but the systems behind them were outdated, disjointed, and built around individual staff habits—not scalable processes.”

Longtime finance staff had retired, and newer hires often left before gaining enough experience to fully understand the organization's complex financial model.

“It takes about three full (annual) cycles to truly get grounded in our structure,” Emily said. “And we just weren't getting there.”

The stakes were high: donor dollars needed to be stewarded responsibly, financial decisions had to be data-driven, and the board was eager for more timely, transparent insights.

The Solution



The Charity CFO stepped in with the systems, staffing, and strategy to rebuild financial clarity—without requiring a costly full-time hire.

Consistent, accurate monthly financials

“For the first time in years, we’re getting reliable monthly reports by the 15th,” said Emily. “They’re in every board packet now. Our board is thrilled.”

Time-saving integrations

The Charity CFO’s team streamlined and connected systems—including a CRM and Bill.com—freeing up 25–35 hours per week in staff time.

Net asset clarity

After years of rolled-forward balances, TCCFO helped untangle and restructure the organization’s net assets, investment policies, and documentation to ensure audit readiness and grant compliance.

A trusted team

The team’s responsiveness and knowledge stood out.

They don’t just know finance—they understand nonprofits. They get how decisions here are made, how boards think, and how important transparency is.”

The Impact



Confidence in stewardship

Leadership now has full visibility and trust in how donor dollars are managed. *“Everything is transparent now. The processes, the reporting—it’s all out in the open.”*



Smooth audits, less staff lift

Auditors have direct system access, and custom reports are already prepared—saving time and reducing last-minute stress.



Trusted guidance, not just transactions

The team has helped with everything from net asset restructuring to bank fee strategy—with a posture of collaboration, not prescription.

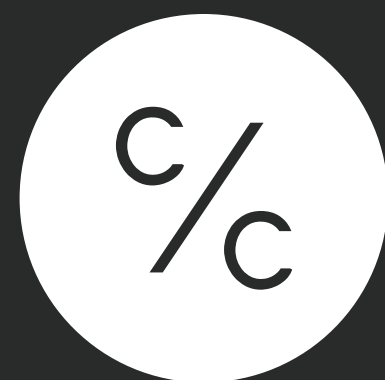


A fractional model that works

“We get a fractional CFO and staff accountant for about what we would’ve paid a single full-time person. And the internal review process? Incredible.”

Emily’s Advice to Other Nonprofits

“This is not just about outsourcing your accounting. You still have to lead. But TCCFO gives you the tools and the expertise to do that better. For us, it’s been a game-changer.” “If you’re trying to outsource your decision-making, this isn’t the model for you. But if you’re ready to invest the time, this team will absolutely deliver.”



Stronger Together



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can do for your United Way.
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