

# THE CHARITY CFO

# Client Impact Story

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**CLIENT SUCCESS STORY:**  
**HOPELOFT**

**INTERVIEWEE:**  
Melissa Helmbrecht, CEO

HOPELOFT

## From Financial Bottlenecks to Mission-Aligned Confidence

### The Challenge



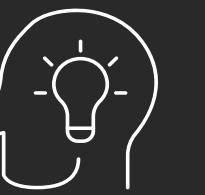
When Melissa Helmbrecht returned from a leave and stepped back into her role as CEO, she encountered a financial environment that lacked structure, visibility, and reliable systems. The organization didn't have a current budget. Reimbursement processes were difficult to track. Financial reporting wasn't aligned with what the board or program leaders needed to make informed decisions.

Administrators who should have been focused on grant writing and programming were instead pulled into financial triage. While the organization had dedicated internal team members, Melissa recognized a core issue: the accounting expertise they had didn't match the complexity of their nonprofit needs.

Hopeloft was also carrying a \$350,000 line of credit - draining resources and creating stress across the organization.



## The Solution



Rather than continue to piece together financial support in-house, Hopeloft chose to fully outsource their accounting and financial leadership to The Charity CFO. While the decision to outsource was a significant leap - especially for a CEO returning to a challenging financial landscape - Melissa knew they needed a partner with nonprofit expertise, structure, and the ability to support recovery and growth.

The Charity CFO provided a dedicated team to clean up and restructure the books, build a usable budget, and create consistent financial reporting for internal and external stakeholders. Along the way, the firm also helped reassign financial responsibilities to the right team members - freeing up internal capacity and reducing stress.

*"We didn't feel judged. We didn't feel embarrassed. You treated us like partners."*

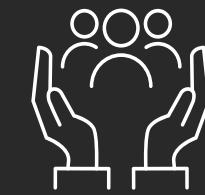
### Melissa's Advice to Other Nonprofit Leaders

Melissa acknowledges the hesitation many nonprofit leaders feel when considering outsourced accounting - especially if they're in a moment of transition or instability. But she encourages leaders to start with a conversation and leave shame at the door.

*"Just sign up to have an introductory meeting. You don't have to commit."*

*"Be transparent. You don't have to feel ashamed of where you are. This is where you'll find relief."*

## The Impact



### Financial Turnaround

Hopeloft was able to pay off a \$350,000 line of credit and now has five to six months of operating cash in reserve. Melissa attributes this turnaround directly to the cleanup and support provided by The Charity CFO.



### Reliable, Board-Ready Reporting

The organization now operates with a budget and reporting system that provides full visibility and timely insight - allowing the leadership team and board to make informed decisions with confidence. *"We finally have a budget. We finally have visibility. And the confidence that comes with that is priceless."*



### Empowered Team

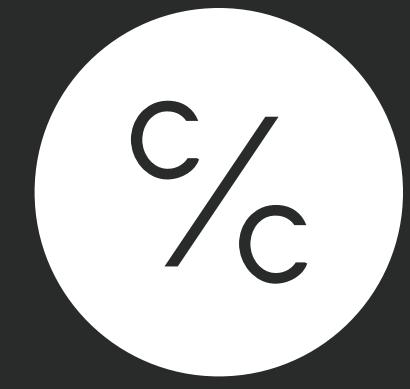
The finance function no longer depends on internal staff being pulled into areas outside their skill set. Administrators are now free to focus on grant writing, leadership, and mission delivery. *"Now my team can make informed decisions without bottlenecks."*



### Rebuilt Capacity and Culture

Outsourcing was a risk - especially after a season of uncertainty. But for Melissa, the partnership brought more than reporting—it brought relief, clarity, and forward momentum. *"It had nothing to do with funders not believing in us. It was all about our capacity to financially administrate the organization."*

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# Stronger Together

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