



THE CHARITY CFO

Client Impact Story



CLIENT SUCCESS STORY:
VERMONT ADULT LEARNING

INTERVIEWEE:
David Justice, Associate Director

VERMONT ADULT LEARNING

Bringing Stability and Expertise to Complex Nonprofit Finances

The Challenge



Vermont Adult Learning has served its community for over 45 years, but behind the scenes, financial operations were becoming increasingly difficult to manage.

- Frequent turnover: Four different finance directors in as many years created instability and loss of institutional knowledge.
- Complex funding: Managing 20–25 grants at a time, each with unique compliance requirements, plus an annual federal audit.
- Systems lagging behind: Processes were heavily paper-based, approvals scattered, and financial management policies not ready for new federal grant requirements, and a limited functioning payroll platform.
- Leadership under strain: Program leaders with limited finance backgrounds were trying to hold things together.

“When we made the shift to you, we, for the first time in years, felt our shoulders drop—that we were in good hands.”

“The confidence that we had people that could guide us to ensure we were in compliance with our grants, with our audit, with our day-to-day functioning—it was a huge relief.”

The Solution



Rather than hire yet another finance director, Vermont Adult Learning chose a different path: partnering with The Charity CFO to bring in-depth nonprofit finance expertise without the risk of a single point of failure.

Team-based expertise, not a single hire

A dedicated team—led by Tim with ongoing support from Pat and Angie—took over day-to-day accounting and high-level strategy.

“Instead of betting everything on one person, we now have a whole team behind us.”

“The consistency of having designated people we work with—and knowing there’s coverage if someone is out—has been everything.”

Federal grant readiness and policy overhaul

Guided Vermont Adult Learning through rewriting financial management policies to meet stringent federal grant requirements, positioning the organization for future funding and audit readiness.

Systems modernization

Transitioned from paper-based and lengthy electronic based approvals to Bill.com, Divvy, and electronic signatures. Integrated payroll and grant tracking with QuickBooks for clearer reporting on a staff of 100 with complex allocations.

“We were a paper-and-pen organization. Now, I can do almost 90% of what I need to do on my phone, on the fly.”

“We untangled a lot of messes in our payroll and grant tracking systems that we hadn’t been able to fix for years.”

Board and leadership alignment

Provided clear cash flow reports, monthly GL summaries, and templates that made board meetings and funder reports seamless.

“We’re on the same page in preparation for meetings, and the board has total confidence in our numbers.”

The Impact



Confidence and stability

Leadership can focus on programs, staff, and strategy—knowing finances are managed by experts.

“You brought stability to a place of uncertainty. That put everyone on our board and leadership team at ease.”

“If we didn’t have you, the ripple effect could have been huge. Instead, we’ve gained capacity to focus on what matters most.”

“There’s confidence in our finances now that we simply didn’t have before.”



Audit success

Submitted the most recent audit a month early and without stress.

“We submitted our audit a month earlier than we typically would, and without stress—for the first time, maybe ever.”

“We had a couple of findings in our audit due to previous gaps, but they were already resolved before the audit was even issued, because of your team’s help.”



Efficiency and accessibility

Ninety percent of approvals and reporting can now be done remotely, saving hours of staff time every week.

“Bill.com, Divvy, electronic signatures—your team helped us modernize our financial management practices in a way we couldn’t have done on our own.”



Scalable infrastructure

New policies, systems, and team-based support mean Vermont Adult Learning is ready to grow—without fear of turnover setting them back.

“Our capacity to give attention to the rest of the organization has probably doubled since we brought you on.”

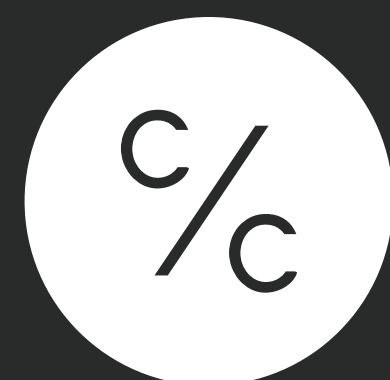
David’s Advice to Other Nonprofits

“Be open to it. We’d never outsourced finances before, but TCCFO has been a game-changer. It frees up so much time for leadership, and the confidence in our financials is priceless.”

“Change can feel risky, but the relief of knowing you have a team of experts on your side—it’s worth it.”

“At first, there was skepticism from the board not having finances in-house. It was just fear of the unknown. Meeting your team multiple times gave us the trust we needed.”

“If you’re willing to stay engaged, this model gives you the tools to lead well.”



Stronger Together
