

## CharterWorks Finds Ideal Hosted Solution with Sage MIP Fund Accounting and nGenX

Charter schools face tremendous financial challenges, and CharterWorks is here to help. CharterWorks provides financial and accounting outsourcing services to help charter schools make the most of limited financial resources. To accomplish this, CharterWorks brings together a staff with extensive charter school accounting, financial reporting, and compliance expertise balanced with real world, common sense business experience. The board of directors includes top charter school operators with proven success and respect in the charter school community.

### Up and Running Quickly

As a new startup, CharterWorks had an advantage. Founder Kristin Dietz, a CPA, had 15 years of financial and accounting management in the educational and charter school sector. Paul Khoury, CharterWorks CFO, brought his Fortune 500 perspective and expectations into the mix.

Dietz, who had already experienced success with Sage MIP Fund Accounting, chose the solution for its outstanding processes, reporting, and audit controls that would enable CharterWorks to efficiently support charter schools.

"Within one hour of seeing the Sage MIP Fund Accounting solution, I loved it! It has the look and feel of an enterprise solution without the price tag. The implementation was very easy and went very smoothly—no glitches!," Khoury says. With the help of their local Sage Business

Partner and hosted solutions provider nGenX, CharterWorks was up and running on Sage MIP Fund Accounting in only three weeks.

### In-House Control, Outsource Convenience

As a startup, CharterWorks is a small organization with limited resources. "It's critical for us to have access from wherever we are—in the office, with a client, or traveling. We also wanted a solution that would allow us to focus on our clients, not IT," Dietz says. "We were thrilled that a hosted solution was available." CharterWorks uses Sage MIP Fund Accounting hosted by nGenX, a Sage marketing partner for managed hosting services. It was the perfect solution for CharterWorks—ownership and control of the software without the upfront cost of purchasing the required technology infrastructure. "We really like the speed, quality, and service that we get through nGenX," Khoury says.



### CUSTOMER

**CharterWorks**

### INDUSTRY

Education/Charter School Management

### LOCATION

North Hollywood, California

### SYSTEM

Sage MIP Fund Accounting

- General Ledger
- Accounts Payable
- Budget
- Bank Reconciliation

nGenX Managed Hosting Service

**CharterWorks**

### Challenge

CharterWorks needed a robust accounting solution that would enable CharterWorks to efficiently support the financial needs of charter schools.

### Solution

Sage MIP Fund Accounting software is accessible anytime, anywhere through a virtual server-hosted environment from hosting partner nGenX.

### Results

CharterWorks has a multi-user product that exceeds their clients' reporting, management, and compliance needs/expectations—providing unlimited growth potential.

## Just What We Needed

“The strong reporting features in Sage MIP Fund Accounting allow us to service our clients,” says Dietz, and “the speed, quality, and service provided by nGenX has been outstanding.” Adds Khoury, “We are our client’s Controller. With Sage MIP Fund Accounting, I have a multi-user product that I am confident in presenting to clients, and a tool that operates as if we had spent six figures on it.”

A key feature for CharterWorks is the internal control and audit trail functionality that Sage MIP Fund Accounting brings. “Our clients depend on us to fulfill this function and this solution is totally auditable,” explains Khoury.

With the help of their Sage Business Partner, nGenX, and Sage MIP Fund Accounting, Dietz and Khoury believe there is no limit to the number of charter schools that can benefit from the services of CharterWorks!

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– Paul Khoury  
CFO  
CharterWorks

## About nGenX

nGenX uses Citrix’s XenApp and Presentation Server to provide Sage MIP Fund Accounting software as SaaS-enabled solution. By using Citrix, nGenX is able to provide the necessary infrastructure to host each application in its SAS 70 Type II certified data center, while providing application availability to each end-user 24 hours a day, 7 days a week. Citrix enables nGenX to deliver the individual Sage Software products quickly, efficiently and in a scalable manner – while drastically reducing the capital expenditures associated with deploying the same solution locally. For more information about nGenX, please visit [www.ngenx.com](http://www.ngenx.com).

## About Sage Nonprofit Solutions

Sage North America has been serving nonprofit and governmental organizations for more than 30 years. The company currently helps more than 3.1 million small and mid-sized businesses and nonprofits in the U.S. and Canada increase efficiency and more easily manage their operations through the use of technology. From fund accounting, donor and fundraising management, and fixed asset management, to online donation processing, human resources, payroll, and health care, Sage offers a software product or service to meet the organization’s need.

## Sage Nonprofit Solutions

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