Success story: Ho-Chunk Tribe of Winnebago Nebraska

With Wipfli as their implementation partner, the Winnebago Tribe of Nebraska chose Sage Intacct to gain digital and financial transformation, grant compliance reinforcement, process automation, zero IT maintenance, and real-time and audit-ready financials.

Client profile

The Winnebago Tribe of Nebraska is one of two federally recognized tribes of Ho-Chunk Native Americans. Established in 1863, Ho-Chunk WTN is located in Nebraska and Iowa. Their entire land base is 27,637 acres, and the Tribe has 4,192 Tribal enrolled members.

Through a combination of economic development entities and federal grants, Ho-Chunk WTN has a diverse collection of funding sources to pay for governmental operating costs.

"Many of the Nation's staff work in a number of different departments, across a number of different grants and at different pay rates. All of this creates ever-changing costing rates and complex allocations," says Alan Post, Chief Financial Officer at Ho-Chunk WTN. "In order to stay in compliance, we must capture and report on detailed, accurate data to ensure that we meet compliance requirements around tracking costs back to the appropriate funding source and are controlling costs where necessary."

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The situation

Like most tribal governments, Ho-Chunk WTN manages numerous heavily regulated and diverse federal programs. To help support the financial requirements, manage their accounting responsibilities and remain compliant, the Tribe had invested substantially in a well-known legacy fund accounting software that was being used by many tribes nationally.

Over time, the results of the antiquated system proved to be lackluster. Ultimately, the solution failed to meet the Nation's objectives and requirements.

- Document management and tracking was still very much a challenge, since it was offered as a bolt-on solution and not included in the actual accounting platform.
- Dynamic financial reporting outside of basic reports was difficult to create on the fly, and department heads were frustrated.
- Grant managers and other department heads had minimal access to important information and zero access to real-time critical information about their programs' budget to actual position.
- Processes were not automated enough, leading to an ongoing bottleneck in procurement and member payments.
- The controls in the system were not tight, and there were too many people with access to data that was not meant for their role at the government.

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- Most importantly, multiple sources of data were being entered manually more than once. This led to financials that were not audit ready and required the ongoing expense of outside consulting agencies being paid to aid in audit prep.

"When I came on, we weren't where we needed to be from a systems perspective. In the end, our finance team came to the realization we didn't have the right tools to help the Nation succeed, and we didn't have the right professional partner to provide ongoing support and training," says Alan. "We were lacking a user-friendly accounting software that met our staff's and the Nation's needs."

Ultimately, the current accounting software lacked the proper accounting controls and modern, maintenance-free capabilities that he knew were available with newer systems.

Recognizing these shortcomings, the Ho-Chunk WTN's newly hired CFO started a search for a new accounting system and an implementation and support firm.

The strategy

First, Ho-Chunk WTN searched for a consulting firm that knew Indian Country.

The goal was to find a firm with a deep understanding of the challenges tribal governments faced, not just knowledge about software or accounting. They sought a firm that was focused on working with tribal governments and had overcome similar challenges. WTN wanted an implementation partner that could lead them in a review of the best solutions in the marketplace and ultimately transform and shape a financial management and accounting change.

After meeting with several firms and reviewing several of the standard accounting solutions common among tribal governments, the clear winner was Wipfli LLP and its tribal specialists, and the solution was Wipfli's tribal-specific edition of Sage Intacct.

The project started by Wipfli leading the Tribe in a comprehensive assessment of its finance and business processes.

First, this assessment created a documented outline of the current processes being performed in Ho-Chunk WTN's current financial system. And it was from this that a series of redesign strategy sessions took place. This involved eliminating all manual efforts that the new technology would manage, reviewing the Tribe's current policy and procedure requirements and reviewing industry best practices to create the ideal functional requirements road map.

A key to Wipfli's process is their attempt to meet with stakeholders across the entire organization who will be touching the new software, both accounting and departmental. This activity of inclusion is particularly helpful in organizational adoption of the overall initiative.

The overarching goal that Wipfli and Ho-Chunk WTN worked towards was to improve quality of data, reduce complexity and improve cycle times to ensure funders and managers were receiving necessary information on a timely basis.

After the detailed functional project plan was created and agreed on, the software implementation began. This included configuring the software, migrating the historical data, beta testing in a sandbox environment, and projecting staff training in the new software to ensure a prepared go-live.

Together, the team constructed a financial accounting software to not only meet the needs of Ho-Chunk WTN but also accommodate the growth of the Tribe.

From an ongoing support perspective, Ho-Chunk WTN selected Wipfli's GOLD Support & Ongoing Training Plan. The Tribe's leadership believed this was important in ensuring their staff had unlimited and hassle-free support while they got used to Sage Intacct. This often proves to be a critical component to project success in year one due to tribal governments running lean accounting staffs and facing turnover challenges.

Wipfli's tribal government edition of Sage Intacct gives Ho-Chunk WTN key capabilities and features, including:

- **Automated procurement with detailed accountability.** This feature ensures the Tribe remains compliant with federal procurement standards and requirements for grant awards. It also enables spend controls to limit what's allowed for grants and only what's budgeted.

- **Automated budget modification workflow.** The Tribe can easily and electronically request and approve modifications through the system.

- **Integrated accessibility for easy stakeholder use.** The single, web-enabled system gives the Tribe's multiple program directors anywhere, anytime visibility into spending and budgets, and facilitates requests, approvals and transactions.

- **Travel expense management.** The Tribe experiences more simplified tracking and expense reconciliation, thanks to the Intacct system.

- **Management of negotiated indirect costs.** The addition of AllocationEdge within Intacct reliably and consistently allocates indirect costs.

- **Simplified asset management.** The addition of AssetEdge within Intacct increases visibility into fixed assets while decreasing time spent managing them.

- **Empowered program directors.** Real-time financial data helps program directors make informed, impactful decisions for their programs.

- **Common chart of accounts.** This allows easier comparisons and more robust reporting across the entire collection of organizations.

- **Greater data integrity.** Manual processes were replaced with automated ones.

- **API automated integrations.** This allowed for automated posting of payroll and loan data, by employee and department.

The results

The results were even better than anticipated.

First, the accounting department moved to a continuous close accounting methodology. This means the Tribe's finance department has audit-ready financials at all times, with a single source of truth.

With Sage Intacct, at the click of a button, accounting can access the documentation and communication behind each transaction. The system also has airtight controls, and compliance documents are all housed in the system for each federal funding source.

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Program directors are empowered with real-time, easily accessible financial information for the programs and funding source they manage. Real-time data enables directors to be proactive rather than reactive as it relates to their areas, empowering them to make sound decisions for their programs and for the Tribe.

While mobile-enabled digital dashboards offer optimal convenience and visibility to make decisions for each area, it's also important to make sure that confidential, critical financial data stays in the right hands. This is done with a prescriptive employee-by-employee set of user permissions.

By leveraging mobile technology throughout the entire approval process, the manual procurement and approval process that created a bottleneck for operations was eliminated. Accounts payable has been able to increase productivity and reduce the amount of time for purchase order processing by up to 90%.

A common chart of accounts, along with Sage Intacct's reporting capabilities, has led to a more robust reporting experience. With the use of dimensions in Sage Intacct, they can do easy side-by-side comparisons of financial information for various grants, funds and programs from various reporting periods. Having on-demand financials with industry leading ad hoc capability is essential to complying with grant reporting requirements.

The culmination of the entire project was a clean and quick audit experience, an engaged and happy accounting team, and enthusiastic and informed department heads.

The project was a digital and financial transformation.

"Technology alone is never enough. As a matter of fact, without the team to deliver, it more often than not fails. An implementation and support partner that knows tribal organizations inside and out is the key to immediate and continued success. Tearing your processes apart, analyzing them, then redesigning your future state, requires more than IT professionals who know software. Wipfli was that partner for us," says Alan.

Let's get started

Wipfli can help your tribal government grow, innovate and become more efficient.

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