

Jitasa Bookkeeping & Accounting Overview For



BOY SCOUTS OF AMERICA®

With company headquarters in Boise, Idaho, Jitasa is a private company founded in 2007, dedicated to providing financial services exclusively to the nonprofit sector. Jitasa has over 600 clients nationwide, including **over 90 BSA Councils**, specializing in **bookkeeping, accounting, financial reporting, audit support, IRS 990 services, grant tracking, and fundraising data management**. Our offices are open 8am MT-6pm MT.

Approach

Jitasa is uniquely poised to meet the needs of our BSA clients in the following ways:

- **PeopleSoft & Sellwise** – Jitasa knows and **uses all BSA accounting systems**.
- We focus exclusively on nonprofits, so we know and understand your needs.
- Our Team-based solution drives efficiency, often resulting in **significant cost savings** for the Council.
- The cross-trained Team ensures **continuity of service, minimum impact of employee turnover, and consistent access to the expertise** you need.
- You **also have access to our CPAs and finance professionals** who support our accounting Teams, providing **enhanced control** through better segregation of duties.
- Through our team approach, we keep your books clean, accurate and organized, ensuring the Council has **the internal controls necessary to be audit-ready**.
- **Consistent communication** with the Jitasa Team Leader as a primary contact ensures ready access to answers and information.

Accounting Deliverables

Our contracts are flexible, allowing you to create a structure that matches the unique needs of your Council, including:

- Month End Close
- Bank Reconciliations
- Balance Sheet and Operating Statement review
- Monthly & Weekly Calls
- Coordinate Payroll in conjunction with IOI Pay
- Accounts Payable and Vendor Payments Processing via Bill.com
- Reconcile Trading Post and SellWise entries
- Audit Preparation & Support

Staffing

Jitasa operates in a team environment. Our BSA teams are staffed with a mix of skills and are assigned to specific Councils. Team sizes range from 3-10 staff. As of July 2019, Jitasa currently has over 180 full time staff consisting of:

- **Accounting Services Delivery Teams** – Accountants directly supporting client councils
 - CPAs
 - Senior Accountants; Accounting Associates/Degreed Accountants
 - Bookkeepers
 - Accounting Specialists – BSA Accounting Specialists available for onsite management of the transition process or other client-specific needs
- **Fundraising Data Management Team** – Data Specialists trained in the BSA Blackbaud CRM application
- **Delivery Support Team** – Bookkeeping & data entry staff supporting our client delivery teams
- **Management** – CEO (Jeff Russell), General Manager of Accounting Services (Christian Spearow), Manager of BSA Accounting Services (Brock Burgess), Vice President of Sales (Steve Doud), Vice President of Accounting Services (Mary Soper, CPA), Vice President of Marketing (Jon Osterburg), Vice President of Finance (Don Needs), Director of Global Delivery Support (James Strombeck)

Training

- Jitasa BSA teams receive regular training through the BSA National Finance Impact Department training programs covering proficiency in the **BSA PeopleSoft system**, standard procedures, reporting, monthly closing, audit support, among all other PeopleSoft basics.
- Additionally, all Jitasa BSA accounting associates have participated in BSA Financial Management 1 training and are familiar and experienced with all BSA standard finance and accounting procedures.
- Overall Jitasa spends approximately **100 hours/year** training our staff through a variety of means including conferences, CPE credits, and internal seminars. Jitasa also partners with SkillSoft, a nationally leading provider of workforce training materials, to create Jitasa University.

Accreditation

Jitasa has performed the independent SSAE 18 review (formerly SAS 70) and is in compliance with all service operation control standards as established by the American Institute of CPAs (AICPA) www.aicpa.org/InterestAreas/FRC/AssuranceAdvisoryServices/Pages/SORHome.aspx. A copy of the report is available upon request.

Security and Document Retention/Storage

- **Security:** In 2012, having exceeded the BSA National Finance Department's standards for the security of client financial information, Jitasa became *the first BSA vendor to be granted full access through the BSA Firewall*.
- **Document Retention and Storage:** Jitasa follows BSA National Finance Impact Department's standards of document retention and storage.