

## Jitasa Bookkeeping & Accounting Overview For



BOY SCOUTS OF AMERICA®

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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 1,200 nonprofit clients nationwide, including **over 120 BSA Councils**, specializing in **bookkeeping, accounting, financial reporting, and audit support**. Our Boise Service Center is open 8am–6pm MT, Monday through Friday, with 24x5 support from our three Global Support Centers in Europe, Asia, and Central America.

### Approach

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

- **PeopleSoft, Sellwise, Blackbaud CRM** – Jitasa knows and **works with all BSA accounting and finance systems**.
- We exclusively support nonprofits, so we know and understand nonprofit accounting.
- 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

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

- Monthly & Weekly Calls
- Coordinate Payroll in conjunction with the BSA national payroll service provider.
- Process Accounts and Pledges Receivable data from Blackbaud CRM in PeopleSoft
- Accounts Payable and Vendor Payments Processing via Bill.com
- Reconcile Trading Post and SellWise entries
- Bank Reconciliations
- Month End Close
- Balance Sheet and Operating Statement Review
- Audit Preparation & Support

## Staffing

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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 February 2023, Jitasa currently has over 300 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
- **Global Delivery Team** – Bookkeeping & data entry staff supporting our client delivery teams
- **Management** – CEO (Jeff Russell), Senior Vice President, Clients & Delivery (Jon Osterburg), Director of Accounting Services (Brock Burgess), Senior Manager, BSA Accounting Services (Ashley Marshall), Vice President of Sales (Steve Doud), Vice President of Accounting Services (Mary Soper, CPA), CFO (Don Needs), Director of Global Delivery Support (James Strombeck)

## Training

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- 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

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Jitasa has undergone an independent SSAE 18 SOC-1 review and is in compliance with all service operation and IT control standards as established by the American Institute of CPAs (AICPA).

A copy of the report for the most recent review completed in October 2021 is available upon request.

## Security and Document Retention/Storage

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- **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 the BSA National Council's standards for local council document retention and storage.