



— MCCALLUM THEATRE · PERFORMING ARTS · PALM DESERT, CA

Two Years of Workarounds. *Solved in Days.*

How the McCallum Theatre restored live Financial Edge reporting after Blackbaud stopped hosting third-party products, ending a frustrating two-year search for a solution.

CLIENT

McCallum Theatre

SOLUTION

Data Moose CDP · F9 / Financial Edge NXT

REFRESH

Every 2 hours or on-demand near-real-time

datamoose.ai

35 years of world-class performances. A reporting problem no one anticipated.

The McCallum Theatre has been the premier performing arts center in the Coachella Valley for over three decades. From Bob Hope and Lucille Ball to Carol Burnett and Oprah Winfrey, the McCallum stage has hosted some of the most celebrated names in American culture. President Gerald Ford served as the theatre's board chairman for years. Today, it serves the Palm Desert community with world-class performances and critically acclaimed education programs reaching over one million students since 1997.

Behind the scenes, Robert McConaughey, the theatre's interim President and CFO, runs the financial operations on Blackbaud's Financial Edge NXT. For years, he relied on F9 by Infor, an Excel-based reporting tool that pulled live data directly from Financial Edge, to produce the customized financial statements his board and Finance Committee required. The McCallum moved to the cloud in January 2020. The timing turned out to be fortunate. When the pandemic hit weeks later and the entire staff went remote, cloud access meant 30-plus employees could reach their data without trying to log into a remote desktop on a single on-premise server.

The setup worked well until Blackbaud stopped hosting third-party products. With little advance notice, the live connection between F9 and Financial Edge was severed. What followed was nearly two years of frustration, workarounds, and a search for a solution that could restore what Robert had lost.

WHY NOT BUILD IT INTERNALLY?

The alternative was not realistic.

Robert considered whether the theatre could build its own data warehouse, either internally or through an outside consultant. He quickly ruled it out. The time, resources, and infrastructure needed to do your own data warehousing is a tremendous undertaking, as Robert put it. Pulling data from Financial Edge NXT through Blackbaud's SKY API requires knowing every relevant data point, managing API rate limits, handling record deletions, and keeping pace as Blackbaud expands the API over time. Hiring someone for a one-off build is neither cost-effective nor sustainable for a lean nonprofit finance team.

Migrating to a different accounting system was the other option. That path came with its own significant costs: months of implementation time, staff retraining, and a full transition away from the customized reporting workflows Robert had spent years building in F9. Data Moose offered a third path: restore exactly what he had, without changing anything else.

A reporting workflow that worked perfectly, until it didn't.

The McCallum Theatre produces a customized financial statement that is neither standard accrual nor pure cash basis. Their board and Finance Committee require visibility into actual cash received on pledges and donations, not just when revenue is recognized. As Robert explained, a \$50,000 pledge cannot pay the light bill. The board needs to see when cash comes in, not when revenue is booked. F9 in Excel was the only tool that gave him the ability to pull data from balance sheet cash accounts directly onto an income statement, something standard Blackbaud reporting simply cannot do. When it stopped working reliably, there was no simple replacement.

Blackbaud stopped hosting third-party products

When Blackbaud ended hosting for tools like F9, McCallum's carefully built Excel-based financial reports lost their live connection to Financial Edge NXT.

Manual data backups with days of lag

As a stopgap, Blackbaud agreed to send periodic database backups. But backups arrived days after changes were made, meaning financial statements were never fully current.

Board reporting on someone else's schedule

When the board chair called for current financials, the answer was "wait until Monday." Robert was planning his entire week around backup delivery windows rather than his own priorities.

A year and a half with another vendor, no solution

McCallum tried a competing solution for 18 months before receiving a full refund. No workable fix materialized. The problem remained unsolved going into year two.

What changed for the McCallum Theatre.



Live financial reporting restored after two years

The custom F9 reports Robert had relied on for years are fully operational again, pulling live data from Financial Edge NXT on a two-hour refresh cycle. A BWF study found that 45% of nonprofits spend 16 or more hours per month generating critical reports. Robert's reporting workflow is now back to where it was before the disruption.



Board reporting on Robert's schedule, not Blackbaud's

When the board chair calls for current financials, the answer is no longer "wait until Monday." Robert can work on financial statements any day of the week, including weekends, and have accurate, reconciled numbers within two hours. If a board meeting is Monday, he can finish reports over the weekend without worrying about stale data.



Full confidence in the numbers

Robert reconciles his customized cash-basis income statements against the standard accrual reports from Financial Edge each month. Every month, the numbers balance. "I haven't had any issues with trying to balance now."



No new tools, no migration, no retraining

McCallum kept F9, kept Excel, kept their existing report formats. There is no Data Moose portal, dashboard, or user interface to learn. The only thing that changed was that the data became live again. Nothing else required updating.



Minimal IT involvement required

Implementation required only a VPN connection between the theatre and the Data Moose-hosted server. No internal infrastructure build, no ongoing maintenance, and no additional demand on an already stretched IT team. As Robert noted, his IT staff is already overworked. He could not ask them to build and maintain a data warehouse on top of everything else.

"It's been a game changer for me and my ability to produce financial statements."

ROBERT MCCONAUGHEY, INTERIM PRESIDENT AND CFO, MCCALLUM THEATRE

A continuously refreshed data warehouse. No new tools required.

Data Moose is CRM and ERP agnostic. We connect to Blackbaud's Financial Edge, Raiser's Edge, and other nonprofit platforms including Salesforce, Microsoft Dynamics, and other legacy systems, pulling data through each API endpoint and loading it into a governed SQL Server data warehouse that refreshes on a schedule the client controls.

HOW DATA MOOSE WORKS

Your data. Your tools. Always current.

Data Moose runs entirely in the background. There is no portal, no dashboard, and no new interface to learn. We extract data continuously from Financial Edge NXT and Raiser's Edge NXT through Blackbaud's SKY API and write it into a SQL Server data warehouse hosted on a server we manage on your behalf. You retain full administrator rights to the SQL Server itself. You can add your own data, views, indexes, or bring in data from other sources to run analytics across multiple systems.

Any reporting tool that can connect to SQL Server, including F9, Power BI, Tableau, SSRS, Crystal Reports, or a standard ODBC connection, works immediately. End users need no technical ability beyond what they already use to run reports. For McCallum, that meant reopening Excel, reconnecting F9 to a live database, and refreshing reports that had been effectively broken for two years. The reports, the formulas, and the formats Robert had built were still there. The data was simply live again.

McCallum runs a scheduled refresh every two hours. Some Data Moose clients refresh every hour for 18 hours a day. The schedule is determined by each organization based on how often they need current data. Either way, changes made in Financial Edge are reflected in the data warehouse without waiting for a backup from anyone.

"I would have wished that you guys had been here sooner. I didn't have to go through some of the aggravations."

ROBERT MCCONAUGHEY, INTERIM PRESIDENT AND CFO, MCCALLUM THEATRE

The McCallum situation is more common than most organizations admit.

Many nonprofits built their financial reporting workflows on tools like F9, Crystal Reports, or Excel-based solutions that connected directly to on-premise databases. When those organizations migrated to cloud-based systems, those connections broke. Some rebuilt from scratch. Others are still working around the problem, waiting on exports and backups the way McCallum was for two years.

Data Moose is CRM and ERP agnostic. Whether an organization runs Blackbaud Financial Edge, Raiser's Edge, Salesforce Nonprofit Success Pack, Microsoft Dynamics, or another system, we connect directly, consolidate the data into a governed SQL Server warehouse, and keep it current. Any reporting tool an organization already uses can connect to that warehouse immediately. For organizations with established reporting workflows, nothing needs to change except the data source.

ORGANIZATIONS THAT RECOGNIZE THIS PROBLEM

- Nonprofits using F9, Crystal Reports, SSRS, Power BI, or Tableau that lost their live database connection when migrating to Blackbaud NXT
- Finance teams working from periodic data exports or backups rather than live Financial Edge or Raiser's Edge data
- Organizations that have considered building their own data warehouse but lack the internal resources to build and maintain it
- CFOs and controllers who need to produce customized board-level financial statements that standard Blackbaud reporting cannot accommodate
- Nonprofits with overworked IT teams who need a managed solution that requires minimal ongoing involvement

Data Moose is built exclusively for the nonprofit sector. Every engagement is led by our Professional Services team. Implementation typically takes hours to a few days, not weeks. To learn more, reach out at info@datamoose.org.