



## CASE STUDY

# Trackable Spend at Scale

Organization



Organization Type  
Church

Brief

Gateway Fellowship Church needed a secure and trackable way to enable operational spend while experiencing organizational growth.

As an attendee of over 8 years, and part of the staff for 6, Josh Brannon has a deep understanding of Gateway Fellowship Church. In his role as the Executive Director of Operations, Josh has seen the steady growth of not only the church staff but the expansion to multiple locations beyond their key San Antonio, TX site.

## CHALLENGE

As Gateway Fellowship Church grew, their main challenge was managing expenses at multiple locations. Credit cards were used and distributed to staff positions but this method hit a roadblock with the church planting process. Key volunteer leaders were spearheading the new church locations and needed access to funds to cover expenses for set up. Since they were not technically church staff, it became a difficult procedure to manage how people can get money. "We don't want people using someone else's card so when you're trying to delegate

responsibility and have people lead key areas then they will either have to use their own money and get reimbursed or have to request a cash advance or get some petty cash.”

This also created a headache when it came to reporting and reconciliation time. As Josh says, “We’ve had frustration with workarounds we needed to create based off our credit card transactions and not being able to do everything we wanted in one place. The team was spending too much time and resources to create workarounds to make up for what the reporting system lacks.”

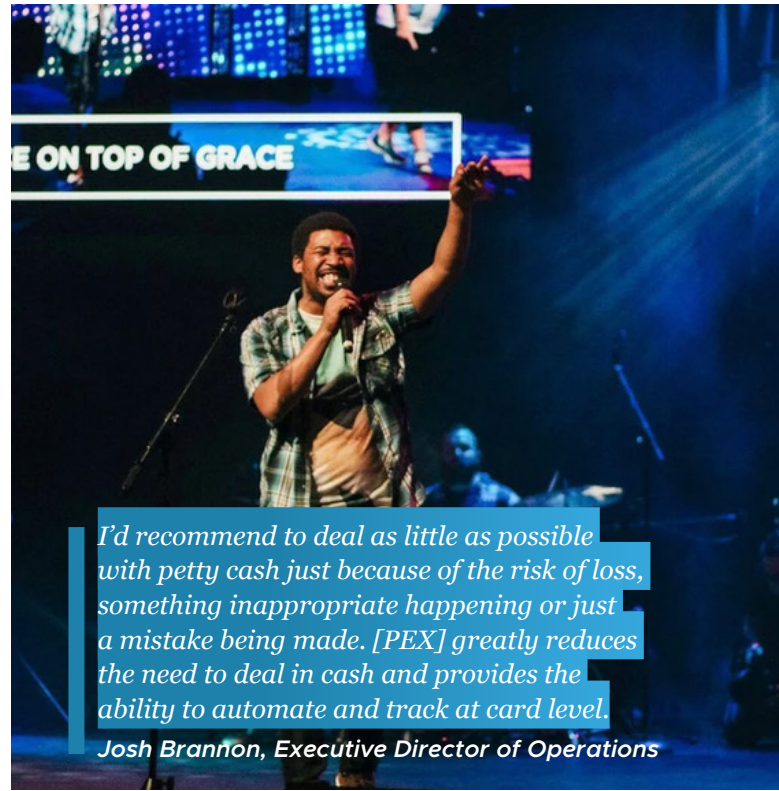
## IMPLEMENTATION

Setting up PEX cards at Gateway proved to be a smooth transition as volunteers welcomed the more streamlined way to track expenses. As Josh says, “Using PEX with our team leads has been great because you are able to communicate in advance and set expectations such as what the budget - how much we are allocating each month or week. This way everyone is in the know and it’s not a guessing game.”

Reporting was also simplified as funds were easily trackable since teams were able to request funds from the app as needed. Josh explains, “We can load \$100 to the [PEX] card and then not have to think about it again until the end of the month. Then all we need to do is make sure we have the receipts uploaded and check it against our accounting system.”

## CLOSING REMARKS

For Josh and Gateway Fellowship Church, the transition to PEX has empowered its team leaders to make key decisions during the church planting process. PEX cards provided a valuable resource that fit the needs of a modern, growing church allowing for a more streamlined delegation of responsibilities and expense management.



*I’d recommend to deal as little as possible with petty cash just because of the risk of loss, something inappropriate happening or just a mistake being made. [PEX] greatly reduces the need to deal in cash and provides the ability to automate and track at card level.*

**Josh Brannon, Executive Director of Operations**

## A FEW OF THE BENEFITS OF PEX



### TRACKING AND INSIGHTS

Precisely track and control spending by employees and volunteers. Payments are more transparent and meaningful with the PEX solution.



### STREAMLINE RECONCILIATION

PEX works with your General Ledger codes and integrates with most accounting software, allowing transactions to easily be allocated to different projects, events, travel, etc.



### ENABLE FUNDING ADJUSTMENTS IN REAL-TIME

You have the option to either directly fund and defund cards or automate the process. Set up alerts to instantly know when a card is used or declined.