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Westtown School eliminates cash allowances and streamlines expense management with PEX + Blackbaud integration

About Westtown School

Westtown School is the oldest independent, Quaker boarding and day school and is located in West Chester, Pennsylvania. Serving nearly 700 students from pre-K through 12th grade, the school combines a close-knit academic environment with a strong operational backbone led by a collaborative finance team.

Westtown needed a system that could support both student and employee spending without adding complexity. Today, the team manages nearly 70 employee cards and 44 student prepaid cards in one centralized platform.

STUDENT ALLOWANCES ARE NOW FUNDED DIGITALLY IN SECONDS

100% elimination of manual cash handling

HUNDREDS OF TRANSACTIONS HANDLED THROUGH A SINGLE PLATFORM

400–600+ monthly transactions managed in one system

AUTO ENFORCER REMOVES THE BURDEN OF MANUALLY FOLLOWING UP WITH CARDHOLDERS

Reduced receipt chasing and improved compliance

> "We evaluated Bill.com and Ramp, but PEX stood out. The direct integration with Blackbaud was the key factor. In addition, PEX provided us with prepaid cards for students and charge cards for employees in one streamlined system."
>
> Tracy Diginto, Accounts Receivable, Westtown School

The challenge

Westtown's finance team was managing a mix of processes and disconnected systems, all while working against tight month-end close deadlines. A handful of employees were routinely late in coding transactions, forcing the finance team to track down missing receipts and follow up manually every month.

Student allowances added another layer of complexity. Every other week, the team issued checks, withdrew cash, labeled envelopes and distributed funds to 44 students.

Previously, corporate cards lacked integration with their accounting system. The Finance team had to:

- Toggle between multiple platforms to manage cards and reconcile transactions
- Manually track receipts and general ledger coding
- Chase down cardholders to submit documentation
- Handle reimbursements for vendors that didn't accept their previous cards

This fragmented setup created unnecessary admin work, limited visibility and slowed down financial workflows.

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The solution

Westtown evaluated multiple providers, including Bill.com and Ramp, while searching for a platform that could support both student prepaid cards and cardholder charge cards. PEX stood out because it offered both card types in one system and integrated directly with Blackbaud.

For Westtown, that integration was the deciding factor. PEX connects receipts and transaction data, which are imported directly into Blackbaud Financial Edge, eliminating manual uploads and creating a seamless flow from purchase to general ledger.

With PEX, Westtown built a modern, connected system:

- PEX Visa® Prepaid Cards for student allowances, replacing cash envelopes with controlled, reloadable funds that can be distributed instantly with robust reporting to track spending
- PEX Visa® Commercial Cards for employees, enabling department-based spending with built-in controls
- Direct Blackbaud integration to sync transactions, receipts and coding automatically into the general ledger
- Auto Enforcer to automatically remind cardholders, flag overdue receipts and temporarily restrict cards, reducing the need for the finance team to enforce compliance
- Auto Tagger and receipt matching to streamline coding and ensure transactions are complete before review
- Bulk card issuance and templates to quickly assign cards by department and user group

The Finance team now operates from a single platform with real-time visibility and built-in controls.

The results

By implementing PEX, the Westtown School's finance team significantly improved its financial efficiency via:

100% elimination of manual cash handling for student allowances

Student allowances are now funded digitally in seconds. The team no longer issues cash to students, making the process safer for students and easier to manage. In addition, students appreciate the ability to easily make online purchases with their PEX cards

400–600+ monthly transactions managed in one system

With nearly 70 cardholders and 44 prepaid student cards, Westtown handles hundreds of transactions each month through a single platform, replacing fragmented systems with real-time visibility and centralized control

Reduced receipt chasing and improve compliance across nearly 70 cardhold

Auto Enforcer removes the burden of manually following up with cardholders by sending reminders and enforcing deadlines automatically, improving accountability while enhancing the management aspect of the finance team's role