

Customer Success Story

Goodwill Southern California turns profits into jobs with SAAS



Goodwill Southern California Non-Profit
Los Angeles, CA

Challenges

- Improve budget process across 200 department codes and 25 contributors
- Eliminate bad data in budget resulting from spreadsheet errors
- Gain improved visibility into actual performance vs. plan

Why Adaptive Insights

- Intuitive Excel-like user interface
- Accessible web-based solution could be rolled out across organization
- Powerful reporting capabilities
- Affordable solution to improve the planning process

Results

- Introduced robust reporting of actuals vs. plan
- Reduced one finance headcount allocated to budget preparation process
- Enhanced employee satisfaction with budgeting process
- Ensured sensitive payroll data was hidden through permission feature

Introduction

With a mission of transforming lives through the power of work, Goodwill Southern California delivers education, job training and placement programs to more than 44,000 people to support their vision of being the premier workforce development resource in California for people with disabilities or disadvantages. The organization operates 60 retail stores, 41 attended donation centers, three campuses and 26 job service/program sites in the counties of Los Angeles, Riverside and San Bernardino. With more than 1,900 employees and \$96 million in revenue in 2008, Goodwill Southern California turns its profits into jobs.

The Challenge

Due to the scale of Goodwill Southern California, the budgeting process is extremely complex. With more than 200 departments to account for, tracking everything individually and rolling it up to a summary level was a challenge. Different people needed access to the budget and it was impossible to maintain the integrity of the spreadsheets when they were distributed in individual files across the organization. Allocating planned expenditures to different departments and programs required the finance team to make continuous adjustments to the budget for specific individuals.

“With more than 25 people participating in the budget process, it was a budget nightmare to deliver reports outlining specific budget data and payroll information based on an individual’s role in the organization,” recalls Jonathan Martin, Budget and Information System Specialist, Goodwill Southern California.

Because multiple files were linked together in Excel, when budget owners made changes to assumptions, the formulas would break, resulting in errors.

“The reporting process with our Excel-based budgeting process was cumbersome and it was difficult to pull out data to analyze and summarize the information,” states Martin. “It was also difficult to compare actuals to the current budget in Excel and make meaningful decisions based on this information.”

The Solution

As the organization continued to grow and invest in automating systems and processes, the finance leadership at Goodwill Southern California knew they needed a more automated process. They had introduced Blackbaud’s Financial Edge as their accounting system of record and now sought to select a planning and reporting solution to replace their manual, error-prone, spreadsheet-based budgeting process.

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Budget/Information
System Specialist

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"Adaptive Planning was a great fit for deploying a user friendly, web-based solution to the many individuals across the organization who participated in the budgeting process," says Martin. "It met our key criteria, which was to roll out a solution that felt like Excel, was easy to use for non-finance contributors, and maintained our data security needs."

Goodwill Southern California selected Adaptive Planning, part of the Adaptive Suite, and rolled the solution out to their users through a training program conducted internally. Now budget participants have permission-based access to the budget and a more intuitive workflow process.

"The process of rolling out this solution was seamless. Budget participants quickly felt comfortable and were happy to be more involved in the process. The transparency of the new budget process, while still maintaining key security permissions, has empowered our department heads to tackle the budget process head on," explains Martin.

The Results

Now Goodwill Southern California uses Adaptive Planning to import actuals and create reports that compare budget plans to data in the general ledger. The finance department spends more time generating and analyzing reports that show how divisions performed and monitoring expenses. Today, close to 50 people are now involved in the planning and reporting processes.

"We now use Adaptive for our budgeting and financial reporting processes," notes Martin. "On a monthly basis, we import actuals data to generate reports for different individuals. This enables us to monitor individual department performance on a more regular basis and to ensure we are meeting our goals and plan. Budget owners are more accountable to their number and able to manage to it more effectively."

The internal finance department uses Adaptive Planning to produce reports which are used for analysis of data, review of headcount and payroll information, and for providing recommendations to each department head and the executive team.

"Now the formulas in the budget are simple and in a format that makes sense to people. We have granted budget access to more people, without the risk of errors occurring due to mistakes in formulas," says Martin. "Finally, the audit trail enables us to see who has submitted their information and hold people responsible for their budgets."

As Goodwill Southern California looks ahead, they see the opportunity to expand the use of Adaptive Planning to empower more employees to take responsibility for their fiscal decisions and overall department performance.

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