"BudgetPak allows us to quickly pull together all the details and explain the 'whys' to the decision makers."
~Wheaton Bible Church

The Customer

Founded in 1929 at the brink of the Great Depression, the flourishing, multi-ethnic **Wheaton Bible Church** has been serving the northwest suburbs of Chicago for more than 90 years. In addition, Wheaton Bible Church also maintains Tri-Village Church, a preschool, family case management community services, adult literacy programming, and after school youth programs. The church employs 100 on-site staff members plus 90 field missionaries and provides a spiritual home for 3,000 attendees weekly. Future plans include doubling reach over the next five years by building additional congregations, attracting more young single adults and young families, increasing enrollment in student ministry, and expanding volunteer hours.

Wheaton Bible Church's growth mindset is interconnected with its financial strategy. Sheree Brugmann has been the Director of Finance and Accounting since December 2017. With 22 years of CPA expertise in faith-based, not-for-profit organizations, Sheree appreciates the importance of the budget's role in bringing vision to life. *"For faith-based non-profits, it is imperative to* **budget around the strategic plan**. *You can start with the prior year, but you really have to take time to weed out unnecessary areas of cost and build in new initiatives based on your organization's goals."*

The Problem

Shortly after Sheree joined Wheaton Bible Church's finance department, the Executive Pastor of Administration invited her to look for "inefficiencies". The organization's budgeting process stood out right away: *"We had 150 departments with 40 budget holders involved in a manual process that included lots of back and forth with papers and data entry. It was very cumbersome."*

Using Shelby as their accounting system, the finance team began each budgeting cycle by distributing printed budget worksheets to each budget holder. *"Some of our budget holders who were a little more tech savvy would create spreadsheets, but most would just handwrite their budget numbers into their worksheet, often with very little narrative or support for their requests. Then our finance team would manually input each worksheet into our accounting system to get a consolidated budget."*

With multiple layers of approval, any changes would start the process all over again, adding extra work for everyone: *"We'd present the consolidated budget to our finance committee, and based on their input we'd go back to the budget holders to refine the budget. We had to print out worksheets again and reiterate the process of inputting changes. After approval by our elder board, we'd print again and ask budget holders to tell us how to spread the budget throughout the year, and then we'd go back and input that. Finally, we would bring it to our membership for approval."*

In addition, the finance department distributed actual vs. budget sheets monthly and asked each budget holder to explain discrepancies. All of this took precious time and energy away from the organization's larger goals. Sheree wished for an efficient way to support Wheaton Bible Church's decentralized, highly collaborative budgeting culture. When she saw an email in her inbox about a budgeting software solution that could automate their process, she decided to take a closer look.

The Evaluation

Sheree explored several budgeting software solutions before narrowing the field and demoing her top two choices with the church's Senior Accountant and the Executive Pastor of Administration. The clear winner was **BudgetPak, a cloud-based budgeting, forecasting, and reporting solution from XLerant**. *"During the demo, BudgetPak stood out from the rest with its exceptional ease of use. We really liked BudgetPak's guided approach, the step-by-step process that was easy for users to follow and* **much more intuitive than a spreadsheet.**"

Sheree and the team were impressed with BudgetPak's features that facilitated **communication and collaboration**: *"BudgetPak offered line-item detail, drivers, and the ability for budget holders to add comments, run reports, and drill down into detail throughout the year. The finance team liked that we would be able to see where people were in the process; that we could view signoff by budget holders, supervisors, and approvers; and that we could easily get a consolidated view— with no paperwork whatsoever. When we presented BudgetPak to our Senior Leadership Team, they were fully on board."*

The Solution

Sheree says she has been happy with BudgetPak from day one. *"BudgetPak has the best **customer support** I've ever seen in all my years with software providers. Implementation went smoothly, and every time I had a question, I would get a very quick response, often within hours. I love the online support desk where I can type in a search term and relevant topics pop up."*

Now in the second budgeting cycle with BudgetPak, Sheree has seen an evolution in the organization's **strategic budgeting mindset**. *"BudgetPak has allowed the opportunity to have discussions around our strategic plan, and how we don't want to simply budget what we did last year."*

There was a positive user response to BudgetPak with budget holders commenting on the system's **ease of use** and how they liked it so much better than the previous system. *"The budget holders were really excited that they could compare their budgets to actuals and drill down into the transaction detail without having to ask finance. The system is very empowering for users; even our less tech savvy employees have been able to figure it out."*

BudgetPak provides a streamlined process for Wheaton Bible Church's budget holders to add details and justification for their requests, which has improved **insight and oversight**. Sheree says, *"BudgetPak gives us an easy way to instantly capture rationale, which helps us tie the numbers to our goals so that we can make informed decisions. I was actually a little surprised by how many people added details into their budgets versus just plugging in numbers."*

Sheree thinks highly of BudgetPak's reporting and forecasting capabilities: *"BudgetPak allows us to quickly pull together all the details and explain the 'whys' to the decision makers. I've been able to use the forecasting features to show senior leadership where we might need to make changes."*

BudgetPak has transformed Wheaton Bible Church's previously manual process into an automated and efficient system. Sheree says that the time savings—and the paper savings! —have been a significant benefit for the finance team, the budget holders, and the organization as a whole.

> " BudgetPak has created an opportunity to have a more focused discussion on our budgeting philosophy. "

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