XLERANT

Case Study

"The budget gets completed a lot faster thanks to different features in BudgetPak .

~East Coast Migrant Head Start Project

The Customer

East Coast Migrant Head Start Project (ECMHSP) was established in 1974, through a grant to the Leadership of Christian Women, to provide services to migrant farmworkers and their children and prepare them for success. ECMHSP provides services to 2,759 migrant and seasonal children, operating through 49 centers in 10 states.

LaTonya Harrison is the Grants Manager for ECMHSP, and has been with the organization since 2013. She says, *"We provide Head Start services to children from as young as six weeks to five years old, and we provide parenting trainings as well. Our main objective is school readiness--to make sure our kids are ready for school when it's time for them to start school."*

The Problem - Spreadsheets & wrong solution

With her past experience working in non-profits, LaTonya knew what a successful budgeting system should look like. She says, *"When I started here, it was a very centralized budgeting system. At first, it was just the finance department preparing Excel spreadsheets for each one of the centers. I wanted the budget managers at each center to have the responsibility for their own budget, so we switched to having them complete their own budgeting spreadsheets to send to me."*

But that unfortunately led to more problems. *"The spreadsheets were a mess. I had to deal with broken formulas, additional rows that the managers added, and a number of other issues as I tried to roll everything up into one budget."*

ECMHSP is unique because the centers operate on different phases. LaTonya says, *"Because many of our centers operate seasonally, it can become complex dealing with the comings and goings of our workers. Every season is different because every center has a different time they open and close. Some are open one month, some six months, and some year-round."*

Headcount planning is a critical component of the budget and the budget managers have full transparency into and responsibility for all headcount expenses. They are the ones who understand the hiring needs of their particular center due to numerous changes in hourly personnel throughout the season. LaTonya continued, *"So, we needed a system that would be able to accommodate dealing with the seasonality. And one in which the center directors could manage their own headcount planning needs."*

The Evaluation - Price/value

With these different issues, ECMHSP decided to try something different than Excel. They purchased and implemented a budgeting software program with an Excel-like feel.

LaTonya says, *"We tried implementing a budgeting software solution, but it ended up not working well for our users. Most of our budget managers were center directors, and therefore, didn't have a strong financial background. We needed to find a software program that guided them through the process and presented the information in a way that make business sense to them.*

It needed to be easy for our users to maneuver so they could get their work completed quickly."

By carrying out an extensive web search, LaTonya researched as many options as possible. She says, *"With non-profits, you have to do your due diligence when searching for new software. I had to make sure I found something that could do everything we wanted it to for a cost we could afford. I also made sure to involve some of the end-users, because it ultimately comes down to what works easiest for them. That's when we decided on BudgetPak."*

The Solution - An easy implementation

The implementation process took about six weeks with XLerant's customer service team building out the solution and providing feedback to ECMHSP along the way. LaTonya recalls the process, *"It went smoothly. It was easy. The implementation process ended. The XLerant team provided training for our end users and everyone started using BudgetPak immediately."*

XLerant's BudgetPak is a cloud-based budgeting, forecasting, and reporting solution. It offers flexibility for unique organizations, like ECMHSP. LaTonya says, *"Right now, we do a combination bottom-up/top-down management of our budget. Based on our federal grants from the Office of Head Start, I give directors the number they can budget to for their center. They are responsible for budgeting for expenses and managing headcount planning."*

LaTonya has a simple and structured training process for the budget managers. She says, *"We currently have 62 users. When someone new comes on, it's typically not during the start of the budget cycle, so we start their training with higher level functions like reporting and then provide a more in-depth all-day training about all aspects of budgeting including using BudgetPak right before the budget season starts. We also developed our own online BudgetPak course for users to go through. After that training, I'll have brief, occasional meetings with the budget managers to answer some questions or show them a new function. They took to it really well."*

> " By moving to BudgetPak, our users have definitely been more engaged. They're taking on more ownership because they are looking at their budget a lot more than they were used to. They now understand all of the different line items that make up their budget. It's a much more user friendly experience. "

The Results - Engagement & time savings

LaTonya notices a lot more engagement from users. She says, *"By moving to BudgetPak, our users have definitely been more engaged. They're taking on more ownership because they are looking at their own budget a lot more than they were used to, when the process was more centralized. They now understand all of the different line items that make up their budget. It's a much more user-friendly experience."*

BudgetPak provides hundreds of configurable reports right on day one. LaTonya saves time by being able to run reports at any level of the organization instead of trying to combine and roll everything up from spreadsheets which used to take weeks. Because of federal funding requirements, LaTonya has to provide employee-level reports to the government. Previously she needed to pull that data employee by employee from Excel. Now she can just choose one of many headcount reports and immediately get the data she needs.

Not only does it save her time, but it saves everyone time. LaTonya says, *"The budget gets completed a lot faster thanks to different features in BudgetPak. Our users find it very helpful to have their notes and justification on each line item carried over from the previous year. This gives them a great starting point for the next budget cycle."*

"The bottom-line is that it's a user-friendly software that works for users with or without a financial background. It asks the right guiding questions, as simple as 'Are you hiring anybody new?' Depending on your answer, it gives you easy-to-follow next steps. It's efficient, and you don't have to worry about numbers being wrong or formulas breaking. Everything is right there. I love using it."

LaTonya highlighted the need for organizations considering the purchase of a budgeting solution to not just look at the software from a finance perspective, but also from the end user perspective. She says, *"They do really need to think about who's actually using the software."*

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