Not-For-Profit Baptcare

Oversees $144 Million Budget with BOARD Budgeting and Forecasting Solution

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At a glance

Company   Baptcare

Industry   Community Services, Not-For-Profit

Location   Victoria

Solution   BOARD CPM/ BI Platform

Function   Budgeting and Forecasting

Key Points

- Not-for-profit Baptcare replaces ageing systems with all-in-one budgeting and forecasting platform, BOARD.

- BOARD improves budgeting and forecasting accuracy, ensuring ongoing delivery of critical community programs.

- Meeting complex not-for-profit reporting requirements is now easy and fast.

We liked the transparency inherent in the forecasts and the demonstration from Professional Advantage opened our eyes to how flexible the design could be. We could see there was an almost endless ability to keep improving the system.

Tammy Campbell
Management Accountant
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Baptcare

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THE COMPANY

As one of Victoria and Tasmania's leading community service providers, Baptcare provides care and support to vulnerable and marginalised people. The faith-based organisation administers over 70 community service programs across 30 locations. These include residential services for older people, transitional housing for people seeking asylum, foster care, family, children and youth services, and mental health services.

Baptcare receives most of its funding from federal and state governments. In 2013/14, the organisation received $144 million in revenue, with 81% spent on service delivery.

CHALLENGE

Baptcare's top priority is delivering high-quality programs and services to older people, children, families, people with a disability, financially disadvantaged people, and people seeking asylum. Accurate budgeting, forecasting and reporting are essential for ensuring these valuable services continue.

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Baptcare's 1600 employees cost and monitor every project to ensure budgets stay on target. Variances are identified and accounted for as early as possible, and funding bodies for each program are kept up-to-date with regular, in-depth reports.

However, by 2014, Baptcare had outgrown its two budgeting and forecasting platforms. One was about to lose support from the developer and both lacked transparency, which meant employees did not understand or trust the numbers produced. Neither had all the capabilities that the growing not-for-profit required for financial visibility.

Baptcare sought a new tool to make budgeting and forecasting faster and more accurate. Unlike its predecessors, the solution needed to be scalable, flexible and allow employees to:

- Create multiple budgets and forecasts across any range of months.
- Budget using either a detailed bottom-up process or top-down approach.

- Take complex awards and allowances into account when budgeting and forecasting payroll.
- Build a transparent budget framework.
- Produce complex reports without IT support.

THE SOLUTION

Baptcare engaged Professional Advantage to implement a BOARD budgeting and forecasting solution. As one of Australia's leading not-for-profit technology solution providers, Baptcare trusted Professional Advantage to deliver a cost-effective, value-adding project that would support its mission and vision.

Professional Advantage recommended Baptcare implement BOARD, an all-in-one platform for budgeting, forecasting, planning, and analytics. In addition to being flexible and user-friendly, BOARD eliminates the need for separate business intelligence and analytics tools – helping Baptcare's IT budget go further.

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Professional Advantage's BOARD solution provided:

- Dynamic online budgeting and forecasting across the organisation.

- Support for complex calculation rules and assumptions to accurately model future revenue.

- Management of complex planning areas, including:
  - Capital expenditure
  - Budgeting across multiple cost centres using varying capitalisation dates, depreciation methods and asset classes
  - Allocations based percentage of revenue, number of FTEs and occupancy

- Self-service financial reporting and analytics, including visualisations and dashboards, providing instant access to:
  - Income statements
  - Balance sheets
  - Cash flow projects

- Support for the organisation's complex reporting needs, from day-to-day reports to custom reports for stakeholders.

- Integration with Microsoft Dynamics GP, as well as Baptcare's CRM and payroll systems, to provide a single, holistic view of business performance.

Over in Human Resources, BOARD introduced detailed calculations incorporating hourly rates by shift and multiple shift allowances. These new capabilities allow HR staff to:

- Calculate pay increases, bonuses and leave loadings.
- Split staff across multiple cost centres.
- Account for variations in working hours, such as when an employee takes maternity leave.

FUTURE PLANS

Baptcare plans to use BOARD to introduce rolling forecasts. This is expected to reduce budget preparation efforts, while also improving forecast accuracy.

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RESULTS

Since Baptcare implemented BOARD two budget cycles ago, it has reported benefits, including:

- Improved HR reporting.

- Streamlined budgeting and forecasting processes for payroll.

- Time savings – global forecast updates now take 30 minutes instead of two hours.

- Improved confidence in data integrity and accuracy.

- Reduced manual handling and human error through automation and integration.

- More informed decision making – accurate budgets ensure resources are allocated where needed.

> Other than the time savings, the big change for us has been user confidence in the system. There was always a level of mistrust in the old system because of the inability to see how numbers were processed. Now everyone can drill down quite easily and see how the numbers are derived.

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About Professional Advantage

Professional Advantage is one of Australia's most awarded solution providers, with over 25 years experience in helping organisations improve their business systems through industry leading software solutions. Our 250-strong team in 6 offices across Australia and internationally has successfully worked with over 1000 organisations.