

CUSTOMER STORY:

Los Angeles Conservation Corps



LA CONSERVATION CORPS

“The changes we have made over the last two years have been significant. We are able to take a reporting or fiscal management challenge and find a Blackbaud solution — many times in the software we already own. Our products allow us to do that. I am a firm believer that you have to invest in your financial software, but you also have to work to develop it into what your organization needs.”

— Cheryl Petersen,
Director of Finance,
Los Angeles Conservation Corps

Los Angeles Conservation Corps is the largest nonprofit urban corps in the country, with an annual budget of almost \$25 million. It employs 150 regular staff, most of whom work at the various Corps work sites and charter schools located throughout the greater Los Angeles Area and beyond. Staff may work anywhere within 100 miles of a work site while all still working for the same division, for the same team, and supporting the same mission. Projects range from forest trail restoration, graffiti abatement, urban forestry programs, coastal conservation, weatherization and other vocational training, and case management, so staff is dispersed instead of working under the same roof. The organization manages about 200 projects per year with different start and end dates, including program management, budget development, monthly invoicing, payroll, accounts payable, and contract compliance.

Los Angeles Conservation Corps is powered by:

- Financial Edge™
- Raiser's Edge™
- Advanced Budget Management™
- WebPurchasing™
- Blackbaud Application Hosting™

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Challenge

Currently, there are eight divisions within the Los Angeles Conservation Corps. Each division starts with a plan of about 20 projects. The Finance office used to have to work with spreadsheets representing each division, with columns for each project. Each spreadsheet was linked to other spreadsheets, which calculated benefits, payroll taxes, and workers' comp. If one cell somehow got unlinked, the entire budget fell apart.

With numerous revisions in the annual budget writing cycle, countless hours were devoted to this tedious work. Cheryl Petersen, director of finance for the organization, focused solely on managing the process from inception to board approval, at which point it became the first version of a multipage Excel® workbook later to be imported into **Financial Edge™** by the accounting team.

Additionally challenging, the budget was not broken down by pay period, month, or quarter; it basically stated the amount of revenue and expenses that were expected within the fiscal year, so the actual numbers could differ drastically. Even with Financial Edge, the Corps needed supplemental spreadsheets to manage the project and reconcile it with the annual budget in more detail. "I knew this had to stop. An organization of this size should not be writing budgets on a spreadsheet," said Cheryl.



WebPurchasing shows all levels of approval, and staff can document this and the proper project allocation all from the field.



Advanced Budget Management module has allowed the program managers and finance staff to be more invested in the process.

Furthermore, the Corps was having difficulty engaging staff who worked in the field. Though the Corps has monthly financial statement meetings with each division to review all projects' financial statements and would meet with staff as needed to review budgets, something needed to be done to enable them to be more proactive.

There were other challenges to managing several divisions with projects all over Southern California. The Corps issues 700-1,200 paychecks bi-monthly and utilizes the ADP® system. With the recent addition of ADP's ezLaborManager®, program staff could manage other staff and participant time allocations remotely, but additional work was needed to reflect this detail on the financial statements.

Purchasing had also become very difficult with staff remotely located. Electronic approvals had been implemented via email, but this meant tracking reams of paper for a simple purchase and the emailed purchase requests still had to be manually entered into Financial Edge.

The organization's goal was to engage all program staff, be able to accurately depict the budget on a month-to-month basis, and be able to put in real-time updates and see and compare real data to share with the staff. It was crucial with the continued growth of the organization to streamline various business tasks, improve efficiency and accuracy, and unite the various silos of information within the organization while maintaining transparency.



Solution

Los Angeles Conservation Corps is a long-time Financial Edge customer, but the organization wasn't using it as effectively as possible. Staff could manage all facets of finances, but it was time consuming and challenging to involve program staff without taking them away from their work in the field.

They decided to add the **Advanced Budget Management™** module, which has allowed the program managers and finance staff to be more invested in the process and feel more empowered using the system. Program managers now load their own information, eliminating re-keying, importing into Financial Edge, and manually linking spreadsheets by the finance staff. Finance and program staff have access to the module and can review and update information as necessary. The system combines the ease of use of a spreadsheet with the robust depth of a database. Furthermore, it allows for notes and details to be added for future reference and a high level of analytical detail comparing to prior fiscal years, and actual-to-budget details.



WebPurchasing allows staff the ability to log on and easily access approvals.



Staff has all the up-to-date financial information they need, right at their fingertips!

Los Angeles Conservation Corps also uses ADP® for payroll, in conjunction with Financial Edge. Staff export from ADP® into Financial Edge each pay period seamlessly. Adding ezLaborManager® was the first step in giving program staff the ability to manage business tasks from out in the field, since they could then manage where staff is allocated.

This year, Los Angeles Conservation Corps also test ran web purchasing with its urban forestry program. Partnering with the City, they order thousands of trees for planting and distribution throughout Los Angeles. The **WebPurchasing™** module for Financial Edge was implemented initially only for ordering the trees because it's a very specialized process. Staff all over the field needed to approve invoices ranging from \$500 to more than \$30,000. Since the Corps has a high level of government funding, all approvals must be in place prior to making purchases. This meant that everyone had to be able to log on and easily access WebPurchasing — and they could!



The Corps added **Blackbaud Application Hosting™** and partnered with IBM® to further implement “virtual offices” for program staff to manage projects from the field. With Advanced Budget Management and the virtual offices, field staff have access to contracts (also saved in Financial Edge), budgets, and their most current financial data electronically, whenever and wherever, simply via the Web. They have all the up-to-date financial information they need, right at their fingertips! This, coupled with the previous implementation of ADP® products and WebPurchasing, has allowed the field staff to focus on their projects and not waste time with cumbersome administrative processes.

Cheryl was able to present the Board’s finance committee with a thorough and clear annual agency budget that involved all program managers in the process. She wouldn’t have been able to do this without Advanced Budget Management. In previous years, the budgets were being entered in as the year was closed; this year, they will go into the year with the budgets for more than \$24 million in projects written by pay period and in much greater detail than before.



Jobs have now become proactive instead of reactive; we can plan for changes that need to be made.



Staff members now take ownership by writing and managing their own budgets.

“Our job becomes proactive instead of reactive; we can plan for changes that need to be made. It was a great revolution. It was not that we did not have a budget writing process before; it was that it was laborious and cumbersome; it made it difficult to involve the program staff in the process. The staff is now engaged and has completely taken ownership of their projects’ budgets and can do so in great detail,” she said.

Los Angeles Conservation Corps staff members now take ownership by writing and managing their own budgets. They are able to see where they stand at any given moment, literally down to the decimal point. Originally hesitant to give up their spreadsheets, staff members now enjoy logging in to Advanced Budget Management, along with other Blackbaud solutions, and finding new ways to make processes easier and more effective for themselves.



Results

ezLaborManager® has saved staff hours of office work when they needed to be out in the field. It also adds the level of project reporting to the payroll reports so that this information is imported into Financial Edge each pay period, allocating some staff to as many as 20 projects in a pay period.

Now with Advanced Budget Management and the expanded level of payroll detail, this information is easily tracked per pay period for each project. This process was formerly a report generated on a spreadsheet by exporting percent allocations in Financial Edge. Additionally, it allows complex FTE reports to be maintained.

For any size purchase, WebPurchasing shows all levels of approval, and staff can document this and the proper project allocation all from a Blackberry® in the field. No more delays, and no long strings of emails — all approvals are electronic! Now Cheryl's team can move forward with implementing WebPurchasing across the organization and has plans to create a centralized purchasing system.



Advanced Budget Management easily tracks pay periods for each project.



Now program staff have the ability to create their own budgets based on the project plan.

Before, Cheryl and the entire finance staff spent countless hours managing the budget writing process before it was ever imported into Financial Edge system. “The focus of the organization is always on the mission, but the focus in the industry is proper business management of nonprofit organizations and return on investment for funders. An organization needs to be simultaneously managing the mission and the business,” she said.

Cheryl was able to assist and train program staff on both software application and budgeting principles, and they then created their own budgets based on the project plan. Before Advanced Budget Management, it took Cheryl several weeks and countless hours to complete the budget writing process. Now, she has more than 20 people spread all over Southern California writing a \$25 million budget. All Cheryl has to do is come in at incremental deadlines and do the payroll processing and admin roll-up. The process is completely streamlined which allows Cheryl to focus on other strategic improvements.

