blackbaud

CUSTOMER STORY:
Penn-Mar Organization

Penn-Mar Human Services

"Financial Edge has the functionality we need right out of the box. We did not have to deal with the custom modifications necessary to get the other software packages to work for us."

— Andrew Nolan,
Controller
Penn-Mar Organization

In the late 1970s a group of Maryland parents with developmentally disabled children were faced with the reality that there were no local services for their young as they outgrew the school system. To continue to receive the care they needed, these children would have to travel long distances to urban areas. The parents decided to work together and established Penn-Mar in the basement of a local church to serve their children's special needs. In the early 1980s, the agency incorporated to qualify for government funding.

Over the years, Penn-Mar has continued to grow and now serves over 300 individuals with developmental disabilities in the rural area of northern Baltimore and Carroll counties in Maryland and southern York County in Pennsylvania. The agency owns 44 residences in the surrounding area that Penn-Mar clients are proud to call home. It provides employment opportunities in workshops in both states and supports its clients in individual and group community vocational placements. Penn-Mar also offers family and case management support services. Recently, local community leaders called upon the agency to serve other human service needs as well, and as a result, Penn-Mar has taken a family resource center and Southern Community Services under its wing.
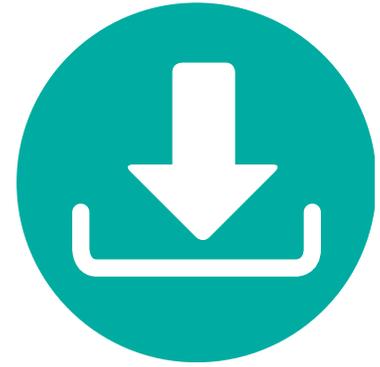
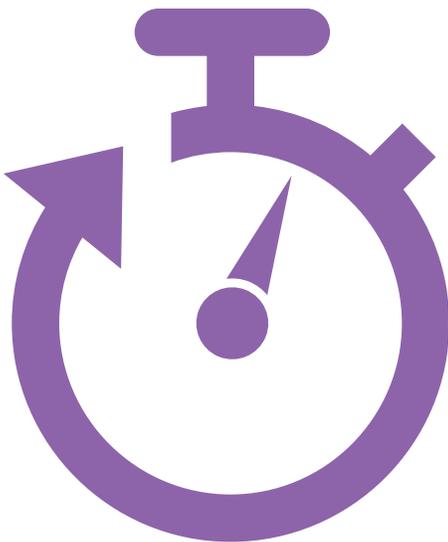Penn-Mar Organization is powered by:

➤ **Financial Edge™**

Learn More ➤

Technology Needs

As Penn-Mar grew over the years, its technology infrastructure had stretched beyond its capacity. In 1999, with the support of the Board of Directors, the agency added to its long-term strategic plan a course of action for updating its technology to state-of-the-art quality. The Penn-Mar Technology Taskforce, led by Controller Andrew Nolan, conducted extensive research that determined the agency's main technology needs were in human resources, time and attendance, payroll, accounting, and fundraising. While no one system would satisfy all of these needs, the Taskforce knew the systems ultimately chosen would need to work together as a cohesive solution. They wanted an accounting package that was extremely strong in budgeting and allocations, had the ability to handle multi-company transactions, and had strong import and export capabilities. They considered for-profit systems, but none of the packages could satisfy Penn-Mar's needs without a minimum of $20,000 of modifications. "When the search was expanded to include Blackbaud, we were amazed that **Financial Edge™** had the functionality we needed out of the box," said Nolan.

With the added functionality of the Dashboard we have the power to see departmental statements anywhere.

Reporting

"Sometimes you don't need a report, sometimes you need an answer," Nolan explained when referring to Financial Edge's extensive reporting capabilities. "Financial Edge can certainly give you the report you need, but if someone walks into my office and asks me a question, I am able to quickly create a query, pivot table or a report to generate the answer on the screen without leaving my desk or wasting paper."

Information Sharing

"And now with the added functionality of the Dashboard, our non-financial managers have the power to see their departmental statements at their own desks using read-only access. They can drill down to see the specific charges to their departments and find many of the answers themselves."

Time Savings

With Financial Edge it now takes just minutes instead of hours to generate Board-ready reports.

"In addition to the savings associated with distributing internal financial statements, Financial Edge has eliminated the duplication of efforts in our offices, including data entry. We have eliminated typing into Microsoft® Excel® for Board and government reporting — it now takes me minutes instead of hours to generate Board-ready reports. We have also eliminated re-keying the output from other systems into the ledger. All interfaces have been automated and are imported into the ledger. A significant percentage of the accounting staff's time has been redirected from data entry to essential financial analysis."