blackbaud

CUSTOMER STORY:
Westside Community Services

"Getting timely information out of our old system in a useful format was impossible. Using Financial Edge has really enhanced our ability to be more forward-looking and to focus our energies on strategically managing the business. Financial Edge is incredibly intuitive, and Blackbaud's training and support are fantastic. The instructors are very knowledgeable and accessible, and they are great about responding to specific questions."

— J. Mark Jenkins,
Director of Finance and Operations
Westside Community Services

Founded in 1967, Westside Community Services is one of the oldest community-based mental health agencies in the nation. Today the organization continues to serve San Francisco residents who live on the margins of society, including people of color, those who are low-income, uninsured, homeless, or suffer from severe and chronic mental illness or HIV/AIDS. Each year Westside serves more than 3,500 individuals through a variety of mental health, substance abuse, and case management programs.

Westside Community Services is powered by:

➤ **Financial Edge™**

Learn More ➤

Challenge

Westside was using an outdated legacy software system that was not intuitive and difficult for staff to use.

Creating useful reports was a manual process that took days. System-generated reports were in a format that was neither clear nor useful to managers or stakeholders.

The lack of timely reporting caused managers to overspend their budgets or to hastily spend remaining funds at the end of a period.

Solution

With a reporting module that offers up to 10 levels of reports and enables users to change a variety of settings from within reports, Blackbaud's **Financial Edge™** was the clear choice as the most streamlined and powerful solution considered.

The organization made an easy conversion from Fundware® to Financial Edge. Having a team of Blackbaud consultants who have a lot of experience with this type of conversion made it even easier.

Westside directors and managers received view-only licenses so they can now directly assess their year-to-date operational spending and remaining budget allowances.

For the first time, staff can now generate a variety of "self-serve" basic reports directly from the dashboard.
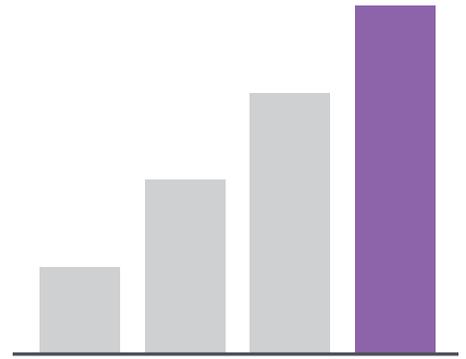
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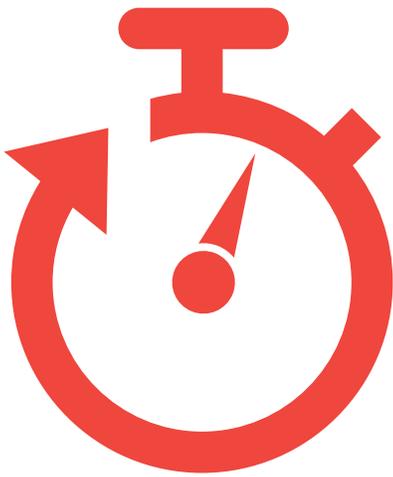
Results

Easy, accurate reporting

Today, all necessary financial reports can be generated in minutes, and accurately.

More staff time for working towards the mission Agency

Staff members now use time previously spent creating reports to analyze report data and make improvements and recommendations.

The fiscal manager is now able to spend more time reconciling contract payments and billing, which enables the agency to more effectively monitor progress toward contract goals.

All necessary financial reports can be generated in minutes, and accurately.