



Any report. Any way. Right Now.™



Case Study: United Way of Calgary and Area

United Way of Calgary and Area gives individuals and families the opportunity to reach their potential and improve their quality of life. Whether they are funding programs that teach conflict-resolution skills to a high-risk family, enable seniors to live independently or help a high school student stay in school, United Way's impact is local, tangible and meaningful.

The Challenge:

United Way of Calgary and Area use an Enterprise Resource Planning (ERP) system whose reports did not meet the reporting requirements of their Board. As is so often found in many software solutions, the reporting tools were limited, leaving Virginia Baescu, United Way of Calgary and Area's Finance Manager with the manual task of exporting her reports into Excel to manipulate the data, and change its appearance. The work she did was not based on real time data, and would become immediately out of date if her staff did entries as she prepared the report. Virginia spent so much time on creating and updating reports that she was left without time to analyze them. The process was not only slow, but Virginia did not have confidence in the accuracy of her data. She knew she had to find another solution.

The Solution:

Virginia had previous experience with another ERP system, with Jet Reports as her reporting tool, and knew Jet Reports would be the solution.

United Way of Calgary and Area began to quickly see results upon implementation. While month end working papers used to take weeks to complete, Virginia is now completing them in minutes - the time it would take to refresh the data. Reports that would take five days to complete, are being completed in an hour, which includes the time it takes to analyze them. Not only is Virginia saving time, but she can now trust the accuracy of the data she is presenting. Virginia is also able to add more value to the reports, flushing them out with more information for the Board to review. She can now accommodate requests for last minute reports, something that was unheard of previously, empowering her colleagues with the information they need, when they need it.

Quick Facts:

Annual Revenue

- ▶ \$53.8M FY08

Employees

- ▶ 93 full time
- ▶ 58 temporary
- ▶ Up to 500 volunteers

Client base

- ▶ 50,000 individual and corporate donors
- ▶ 130 funded organizations
- ▶ 230 supported programs

"I would spend weeks on a month-end report. I would start right after the month end and go until around the 15th to finish the report. Now, my staff is posting, and I'm working. I'm just refreshing my report and when I say I'm done, I'm done. I'm positive that I've captured everything in my report."

– Virginia Baescu

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One of the areas to see vast improvements since implementing Jet Reports is in the management of grant funding and donations. Each project has grants allocated to it and it is important to show how the funds are used on a monthly basis. With some projects having up to 47 grants, this used to be an incredibly long, often dreaded procedure to complete. With the help of Jet Reports, Virginia has created a workbook including a summary and journal entries, and the only thing needing to be changed is the date. With a few keystrokes and a report refresh, she has the information the donor needs, in an easy to understand format. This process takes at most 15 minutes for all 47 grants to be reported on. Virginia is also able to provide accurate to-date spending information in seconds over the phone, when requested by the Director of Major Gifts .

“By reducing the time it takes to create the report, I get the time to analyze – and that’s what I’m paid for.” Not only is Virginia able to perform her job more effectively but her organization is now able to better leverage their investment in her skills.

Virginia also personally benefits from using Jet Reports. She is working less over time, and for the first time was able to take 6 weeks of vacation, giving her an improved work/life balance. She now has the time to complete professional development, and attend meetings that are integral for her to obtain knowledge she needs to analyze the financials, and is not burdened when catching up on her deskwork afterward. The Organization benefits from having a happier, more relaxed and rested employee, who is more sure about her work. As she says, “I don’t know how you can put a dollar sign on that.”

Top 3 Benefits United Way of Calgary has Experienced with Jet Reports:

1. Reduced time in creating and updating reports, making a more efficient use of time.
2. Reports can be created at any time, without having to close the month or keep staff out of the ERP system to complete.
3. More confidence in the accuracy of reports produced, no longer fearing the formulas and corrupt data resulting in less stress and putting the focus back on work.

“Today I’m supposed to do the Operations Statement, which is a set of about 10 statements. I used to start this 5 days before it was due. Now it’s going to be done in less than an hour, including the analysis.”

– Virginia Baescu

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