

The Associated Jewish Federation of Baltimore saves time and embraces modern budgeting approaches with Solver

The Associated Jewish Federation of Baltimore

promotes core Jewish values, including caring for people in need and making a positive difference in the world through social justice in the greater Baltimore area. The group's extensive network of social service organizations supports the city's Jewish community—one of the largest in the United States—and provides vital assistance to elderly adults, people with disabilities, abuse survivors, and other vulnerable populations.



INDUSTRY
Nonprofit

ERP
Sage Intacct

“ Solver was the only service that looked like it would meet our reporting and budgeting needs. Because what we had before was more piecemeal and manual, we were looking for something that could optimize and automate our processes. Solver was really the only software that could meet those needs. ”

– **Devorah Miller**, ERP finance project manager

THE CHALLENGE

The Federation is a sprawling, multi-entity nonprofit encompassing a family of social service agencies with different needs and utilizations, which makes financial planning and reporting a tricky process. Despite those complex needs, the Federation got by for a long time without budgeting software, instead making do with piecemeal, manual processes. The team needed a tool that could streamline and automate analog tasks, freeing up time, speeding workflow, and enabling greater mental energy.



THE SOLUTION

Only one modern budgeting tool felt like a match for the Federation's unique specifications: Solver's extended financial planning and analysis (xFP&A) solutions. "Solver was the only service that looked like it would meet our reporting and budgeting needs," said Devorah Miller, the Associated's ERP finance project manager.

The Federation integrated its existing ERP, Sage Intacct, with Solver's platform, then relied on Solver's implementation partner RSM to build out a customized environment complete with budget templates, reporting tools, and data structures specific to the organization and each of its entities.



Has the Federation Associated customized its Solver Suite?

Miller knew an out-of-the-box solution wouldn't work for an organization like hers, which is made up of a diverse group of agencies providing a range of different services. That's why Solver's customization capabilities have been so key for them. With assistance from RSM, The Associated built out a customized suite of templates and data and reporting tools that meets its unique and "intricate" needs.

How was the experience with implementation, training, and support?

"Our implementation and project team were awesome," said Miller. "They spent a lot of time understanding our complex needs, and building and customizing an environment that we could really use and get meaningful data from." The federation's RSM team went the extra mile by offering on-site training, Miller added, which smoothed the implementation process and helped key stakeholders get comfortable with the new technology.

THE RESULTS

How has Solver improved critical business processes?

The Solver Suite has been transformative for the Federation, modernizing and streamlining its financial planning operations. "Solver took us from budgeting in separate Excel files to being able to collaborate with department heads and different entities on budgets," said Miller. By embracing Solver's robust xFP&A solution, the Federation has gone from an outdated, siloed budgeting approach to a modern system that boosts collaboration and increases productivity.



What key benefits have you seen since implementing Solver?

Solver has saved the Associated time. "The entire budget process has been sped up," said Miller. "Consolidated financial statements are now able to be run in one report—and run very fast." That functionality allows the Federation's executives to review financial data in whatever form they need it, whenever they need it, with no manual number-crunching required.

How does the Associated plan to grow its xFP&A capabilities with Solver?

Right now, finance heads from the Federation's member agencies take advantage of Solver's xFP&A resources. Soon, however, the organization plans to roll out the technology to other department heads, paving the way for greater intra-organization communication, cooperation, and productivity. Miller also sees opportunities for further automation of key processes, template customization, and expansion of reporting dashboards. "We're really excited to launch it to all of our department heads," she said.

