# YMCA Case Study

## COLLINS COMPUTING FOR YMCA'S

Collins Computing created the **Y-Suite** product in collaboration with the YMCA to combine a series of Payroll enhancements that increase the effectiveness of **Microsoft Dynamics GP** in a single package. Designed specifically for the YMCA, the **Y-Suite** includes the following customizations:

- **403B Eligibility Report** — produces a list of employees who qualify, or are about to qualify, for enrollment in the YMCA Retirement Fund.

- **Payroll Code Matrix** — decreases the manual labor required to enter payroll information by condensing and simplifying the data entry process.

- **YERDI Payroll Interface** — facilitates the calculation of participant contributions to the YMCA Retirement Fund and checks the contribution limits by automating the download of payroll information.

- **Payroll Export** — creates a journal entry and exports a text file after payroll has been processed for the Y-Vision program.

- **Void Payroll Checks** — creates "void checks" general ledger transactions and exports corresponding text file to be used by the Y-Vision program.

- **Retirement (YERDI) Interface** — automatically enrolls newly eligible employees into the YERDI retirement system, and then continually updates the system with relevant payroll information.

## YMCA TEAMS UP WITH COLLINS COMPUTING TO BALANCE MEMBER NEEDS

YMCAs are dedicated to offering programs that define us as individuals as well as to build a strong community. Their mission is well-known through the U.S. and it has made a huge impact on our society since 1845. YMCA of the Foothills is no exception. Founded in 1953, they have two facilities in Southern California offering youth programs, healthy living services, and are actively making a positive impact on their community by touching over 24,000 community members.

As a nonprofit, YMCA of the Foothills has unique business requirements and finding one software solution that can do it all is easier said than done. In the 90's, they had a solution called Custos that handled their financials and fundraising programs. The system worked well until Y2K. It was built on a character based code that didn't support transactions such as simple credit card charges and online registrations. They couldn't import data into the system and if they needed to export anything, it was all character based and required time-consuming manipulation within Microsoft Excel to get the data in a format that was usable. The data was also stored on various disks that only a remote operator could locate. This made real-time information about their business nearly impossible to obtain.

YMCA of the Foothills tried everything to patch Custos but in the end it took too much time and effort to train people, they couldn't export to Microsoft Excel, and they no longer had trust in the information it provided. They realized it was time to change when they couldn't get the trial balance to reconcile. This was an indication of a much bigger problem. If the trial balance was off, what other discrepancies were there? And how could they trust their data?

## SOLUTION

After researching their options, YMCA of the Foothills decided to implement Daxko to manage all their operations. But they quickly found that the financial management within Daxko as not robust enough for their specific needs so they contacted Collins Computing for help in implementing Microsoft Dynamics® GP. Even better, Collins Computing made a seamless integration possible between Daxko and Microsoft Dynamics GP for the Point-of-Sale functionality.

Since teaming up with Collins Computing, YMCA of the Foothills has built an integrated system of various applications that work perfectly for their needs:

- Accounting is managed through Microsoft Dynamics GP,

- Reporting capabilities within Microsoft Dynamics GP helps them get the data they need,

- Daxko works as their up-front transactional Point of Sale (POS) and manages their fundraising,

- ADP manages their payroll, and

- Time IPS handles time and attendance entries.

Each system is tied to the right place, helping to greatly streamline every area of their business. Elena Ksendzov, CFO of YMCA of the Foothills says,"Although it may seem like a lot, it's nice not to have all our eggs in one basket. If one solution doesn't work out in the end, we won't need to totally uproot every operation." Elena continues, "It helps to have an experienced and trusted software provider such as Collins Computing to help us create a framework such as this."

## BENEFITS

"The number 1 benefit of our solution is that we're able to produce in-depth analysis reports that are extremely flexible," Elena says.

### Role Tailored Views:

YMCA of the Foothills has over 300 employees and 50 of those employees are program or facility managers. Each manager has differing sets of financials they're in charge of. With Microsoft Dynamics GP, they can tailor reports specific to each area so managers have access to the data that's most relevant to them. As a mission based organization, YMCA of the Foothills' goal is to create positive change, impacting their communities. Elena says, "Role tailored reporting within Microsoft Dynamics GP makes our employees more productive and helps them see through the numbers to better understand the actual impact we have on the people of our community." Even better, once a specific report is created, employees can automatically run a refresh at any given time on their own, giving team members the power to access real-time information important for their job.

### YMCA Functionality:

The financial reporting within Microsoft Dynamics GP works the way YMCAs think. According to Elena, "It's familiar, intuitive and designed for the nonprofit world." As a nonprofit, YMCA of the Foothills has committee members and various governing bodies that make decisions for their organization. Having access to reporting that shows these stakeholders in-depth information into programs, volunteering statistics, membership numbers, and more is a huge benefit. The report writer in
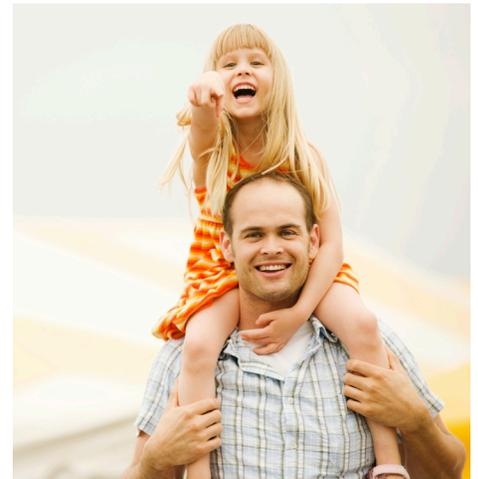
Microsoft Dynamics GP gives YMCA of the Foothills the flexibility to provide valuable information for the success of their mission.

### Project Breakdown Reporting:

Daxko didn't work for their financials because they couldn't break down information by project. With Microsoft Dynamics GP, they can dig deeper into specific funds such as operational, grants, endowment, or sponsorships.

### Easy Reconciliations:

YMCA of the Foothills can now run reports anytime they want and have streamlined their financial reporting to twice a month. Having access to accurate and real-time reporting on where they stand financially allows for peace of mind. The cash transactions are drillable within Microsoft Dynamics GP which makes it incredibly easy to do bank reconciliations.

### In Good Hands:

YMCA of the Foothills feels lucky to have a great team to work with at Collins Computing. Their wealth of knowledge about Microsoft Dynamics GP as well as their experience in working with YMCA organizations has set the YMCA of the Foothills up for success. They now have real-time insight into important organizational data as well as flexible reporting tools, helping them focus on their mission of making a difference within their community.