



# Valley Community Services Board

BI360 Suite delivers streamlined reporting and budgeting for Valley Community Services Board.



[www.myvalleycsb.org](http://www.myvalleycsb.org)

## Company Profile

Valley Community Services Board is a publicly funded organization where citizens of Staunton, Waynesboro, and Augusta and Highland Counties can receive Behavioral Health, Substance Use and Developmental services.

## Industry

Non-Profit

## Country

United States

## ERP System

Microsoft Dynamics GP



## BI360 Suite Delivers Streamlined Reporting and Budgeting for Valley Community Services Board

Valley Community Services Board was looking to automate their planning process, to shorten the amount of time to complete a budgeting cycle with a sensible, sophisticated tool. This organization went with the business user friendly, easy-to-learn BI360 Suite to overhaul their processes with custom reporting and budgeting, as well as the BI360 Data Warehouse for modern, logical consolidation and organization of diverse company data types.

Valley Community Services Board is a 'person centered' organization tailored toward meeting individual needs as they relate to behavioral health, substance abuse, and development services. Their competent, compassionate staff are available and ready to provide support and resources for helping to deal with challenges successfully. When it came to challenges with their own budgeting and forecasting processes, Solver helped them deal with their own challenges successfully.

As a public funded organization, Valley Community Services Board is strategic about using their budget and human capital wisely to achieve what they set out to do in the community. With processes as important as budgeting and forecasting, the organization realized they were not equipped with the right technology to achieve their goals in efficient ways. "The primary problem was not having the proper forecasting and budgeting software," Valley Community Services Board's Chief Financial Officer Phillip Love says. "The budget preparation process used to take over three months and is now down to two weeks. We also had an excessive amount of staff time being spent

on producing daily, weekly, and monthly reports."

Valley Community Services Board implemented BI360 for a few simple reasons, with overarching goals of simplifying and turbocharging. "BI360's ease of use and the ability of staff to learn the product were and continue to be selling points," Love says. "Providing Excel-based template design, staff become proficient on writing and running reports in a very short amount of time." In terms of their users, the team can be fluent in BI360 in no time due to its familiarity and accessibility.

The power of the BI360 Suite has lent itself well to time, money, and energy savings. "We have input all of our financial and payroll information into the data warehouse for our financial statements, budgeting, state reporting, project projections, and daily/weekly client account balances," Love says. "BI360 Publisher has streamlined many of our reporting processes with automated scheduling and e-mail distribution of reports. This has freed up approximately 0.5 full time equivalents (FTEs) for other projects. We have also saved

approximately 0.75 FTEs on our budgeting process.”

The Solver solution, called BI360, is based on Microsoft SQL Server, Microsoft Excel and a Web Portal where end users can enter budgets and run reports on demand. It is available for both cloud and on-premise deployment. Solver has headquarters in Los Angeles, CA and operates internationally, with over 150 employees worldwide.

While Valley Community Services Board’s reports and budgets are all custom, the implementation has been smooth because of Solver’s partnership. “All of our reports and key performance indicators are customized,” Love says. “Solver has been and continues to assist with improving our budgeting forms which are very complex.”

Nils Rasmussen, Solver’s Principal, says: “An increasing number of impactful political subdivisions, like Valley Community Services Board, are upgrading their Corporate Performance Management (CPM) tools to enable better, faster planning and improved decision-making, and it will help them stay on track to best serve their community.”

Valley Community Services Board is seeing great results for their budgeting processes because of BI360. “We take the last rolling twelve months and use it to project our budget,” Love says. “Salaries and benefits are projected based on current individual staff compensation and benefit selection. BI360 templates allow for projected increases by line item and anticipated month of increase. We budget at the cost center level, which rolls up to the company level.”

BI360 has been a truly dynamic solution for Valley Community Services Board, from features and functionality offerings to improvements in reporting and budgeting processes. The organization has used the software solution for their specific needs in a big way, but look forward

to expanding their usage a bit. “We would eventually like to set up the graphic dashboard,” Love says. In the meantime, Valley Community Services Board is enjoying reduced time and money spent on their CPM processes from the BI360 Reporting, Planning, and Data Warehouse solutions.

## Challenges

Seeking to shorten time and diminish money spent on personnel working toward budgeting and reporting processes, Valley Community Services Board began to shop for an enterprise software solution that was more streamlined because of a centralized data repository, like a pre-built, configurable data warehouse. This political subdivision wanted to move their processes into one accessible, dynamic program for a singular approach to producing robust, compartmentalized and wide-reaching reports, budgets, and forecasts across the organization.

## Result

BI360 has not only provided a singular space for the variety of data that Valley Community Services Board relies on routinely to support their leadership team and decision-makers, but the Corporate Performance Management suite has also helped to upgrade reporting and budgeting processes for their business end users, as well as challenge the organization to evaluate different business performance outcomes. Valley Community Services Board plans to extend their BI360 use to include dashboards to showcase their data in accessible, quickly digestible ways to make better, faster decisions about how best to serve their community.

## Resources

[BI360 Data Warehouse Product Page](#)

[BI360 Data Warehouse Informational Video](#)