



Corporate
Renaissance
Group

Transforming Financial Planning & Budgeting to Better Feed New York

City Harvest implements Board for improved financial reporting across projects and to support its aggressive growth strategy.

“It was clear that Board could help streamline our financial operations and refine financial information.”

Arabelle Gatilao, Director of Finance - City Harvest

About City Harvest

City Harvest began in 1982 when a group of concerned New Yorkers saw nutritious food going to waste in restaurants and realized that this food could be redirected to soup kitchens and food pantries to help feed neighbor in need.

Since then, City Harvest has rescued more than 750 million pounds of food, and delivered it, free of charge, to hundreds of food pantries, soup kitchens and community partners across New York City. The organization now manages a fleet of 22 trucks, 160 full-time employees, and 10,000 volunteers annually who collectively help feed the nearly 1.2 million New Yorkers experiencing food insecurity.

City Harvest is New York City’s private response to hunger, and the work they do is supported by individual and corporate donations and foundation grants.



Overview

City Harvest, New York City’s largest non-profit food rescue organization, quickly realized that depending on spreadsheets for effective financial planning and reporting was an inefficient way of handling the numerous projects and daily transactions they manage.

City Harvest’s Finance team partnered with Corporate Renaissance Group (CRGroup) to implement Board™ as a solution to their spreadsheet woes. This move resulted in drastic improvements in City Harvest’s financial business processes, including:

- **improved financial planning & streamlined budgeting administration**
- **integration of multiple data sources & account segments into one platform**
- **a reduction in the budgeting timeline by 20 days**
- **increased accuracy of data collected**
- **faster access to information and reports**

The Need for Board at City Harvest

Prior to using Board, City Harvest was using approximately 200 spreadsheets for corporate budgeting and planning. Since these spreadsheets were not connected, financial information had to be gathered and manually inputted and consolidated from many sources, which was time-consuming and contributed to delays in budgeting timelines.

City Harvest needed to ensure that its financial administrative processes were working as efficiently as possible to address the organization’s multi-faceted business model and support its aggressive growth plans.

City Harvest began searching for a corporate performance management platform that integrated well with their existing Microsoft Dynamics™ GP enterprise resource planning (ERP) system and made it simple to manage complex allocations and projects.

A new system would need to meet their requirements and deliver on results:

- **streamline the budgeting process for the entire organization**
- **meet budget timelines and create actionable reports**
- **manage complex cost allocations and projects**
- **reduce staff costs and time spent on budgeting**
- **streamline decision making and data entry processes**

Moreover, they needed a partner that could fully support their vision and work with them to launch a new system in a tight six-month timeline.

City Harvest reviewed many systems and ultimately chose **Board** because of its flexibility, simple interface, powerful reporting, audit trail capabilities, multi-contributor access permissions, ability to track personnel expenses, robust administrative controls, advanced security, integration with Dynamics GP, and impressive modelling and forecasting options.

City Harvest engaged CRGroup, a Premier Board Partner and leader in financial management consulting, to plan and implement their Board Solution.

City Harvest's Journey with CRGroup & Board

CRGroup worked with the City Harvest team to plan a successful launch of Board. Understanding how to configure Board appropriately meant that the CRGroup team had to be extremely responsive and hands-on. No stone was left unturned. CRGroup ensured the Scope of Work was well defined and updates were communicated regularly and that users were given the training needed to be successful.

CRGroup's in-depth knowledge of financial systems and flexibility in understanding business models and reporting requirements helped ensure that Board was fully configured and launch in time for City Harvest's budget season.

Well Defined Scope of Work

Both the CRGroup and City Harvest teams needed to clearly understand what was required and the best features of Board that would solve the issues. The scope of work was detailed and there was regular communication between both teams, thus eliminating confusion and increasing the speed that Board was implemented.

Focused Implementation

CRGroup worked with City Harvest to make use of Board's ability to add modules 'piece-by-piece'. As such, the team was able to focus on developing use-cases and functionality that would allow for the greatest short-term impact and allow the City Harvest team to launch Board **within 6 months**. CRGroup also worked with City Harvest to stagger the implementation to allow for testing, user feedback, and refinements to ensure that each component and process was rolled out as efficiently as possible and continued to build on success.

"CRGroup demonstrated a high level of expertise and professionalism at every turn. They provided constructive advice, consulted us on budget structures and reporting, and worked to ensure our users were comfortable using the technology."

Arabelle Gatilao, Director of Finance - City Harvest

Guided User Training

Training was an essential component of this stage of the process. All staff members were trained in how to effectively use Board.

Board was configured to:

- provide managers with access to reports
- give each staff member a unique login
- allow staff to edit and view budgets based on set permissions
- provide error-free, dynamic reporting with built-in cost allocations
- create validation reports to ensure that correct information is captured consistently
- provide data integrity across many users for increased confidence in the numbers being presented

Results

Since launching Board in January 2019, City Harvest has been able to realize significant benefits and improvements to their financial planning & reporting process; including:

- **Reduced budgeting timeline by a total of 20 days, resulting in a faster budgeting & reforecasting season.**
- **Easy access to real-time budgets and reports by managers, increasing visibility into key financials and improving the accuracy of budgets & reports.**
- **Establishing one uniform source for financial and operational data across the organization.**
- **Provided more accurate insights into future budgets & financial forecasting.**

City Harvest plans to move beyond the budgeting function to include integration of financial data from other sources. One such integration involves tracking salary and benefits information for employees.

They also plan to use Board as a data warehouse for storing and efficiently using all of their financial data.

Moreover, City Harvest is excited to see what benefits they will realize from Board's forecasting capabilities across cost centers and amidst a time of rapid growth.

"Using Board, managers have an easier way of working with and understanding their budgets. This has improved the participation in and accuracy of our data and reports. We can now spend more time ensuring continued sound fiscal management of City Harvest."

Say goodbye to spreadsheets and hello to Board!

CRGroup can help transform your financial planning, analysis & reporting with **Board™** a Gartner®-recognized all-in-one decision-making platform.

Get started with Board today! 1.800.576.6215

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