

# The Parkinson's Foundation



“PowerPlan is an extremely powerful and useful tool that will help us to grow our foundation and truly make a difference”

**Curt De Greff, Senior Vice President & Chief Financial Officer,  
The Parkinson's Foundation**

## About the Parkinson's Foundation

The Parkinson's Foundation makes life better for people with Parkinson's disease by improving care and advancing research toward a cure. In everything they do, they build on the energy, experience and passion of the global Parkinson's community. More information can be found at [www.parkinson.org](http://www.parkinson.org)

## Business Challenge

The Parkinson's Foundation had a manual budgeting process that was done primarily using Excel spreadsheets. This process was very time-consuming, particularly the aggregation of spreadsheets between various departments at the Foundation. It was difficult for the finance teams to make changes quickly and efficiently because they would have to be laboriously sent back and forth between different departments. There also wasn't always a clear way to see the justifications behind the numbers supplied by departments, and many times management did not have a good understanding of what was driving additional expenses and revenue. In addition, actual and budget data included allocations with the general ledger (GL) accounts that also contained direct costs, making it difficult to generate reliable department and program profit and loss (P&L) statements to compare actual versus budget data.

The main pain points that the Parkinson's Foundation were hoping to solve were:

- Simplification of data collection, particularly an automation of the aggregation process
- Ability to track the commentary (e.g. Getting an explanation of what was being inputted into the system by each department)
- Allowing user departments to run their own responsibility reports of actual versus budget and drill down to invoices.
- Implementation of an effective system to budget and book allocations without distorting reporting.

Want to know more about Questica's Powerplan, non-profit budgeting solution? Visit [questica.com/non-profits](http://questica.com/non-profits)



### Financial System

Blackbaud's FE NXT

### Annual Budget

\$38 million

### Solution

PowerPlan

### Business Need

The Parkinson's Foundation needed to prepare department budgets in one centralized system and eliminate cumbersome, error prone spreadsheets.

### Business Benefits

- Integration with current Financial Edge system
- Easy access to budget data for financial and non-financial staff
- Time saved from manual data entry and using error-prone Excel spreadsheets
- Robust reporting, ability to track commentary, and forecasting capability
- Exemplary customer service that provides satisfaction and peace of mind

## Business Solutions

### Making the budgeting process more efficient

The Parkinson's Foundation implemented PowerPlan as a complement to its Financial Edge General Ledger system to be able to budget more efficiently and to permit monthly reporting to permit departments to produce their own P&Ls to track their performance. With the help of PowerPlan consulting by Questica, a Euna Solutions brand, it modified its allocation budgeting and reporting to eliminate distortions in its accounting.

### Departmental ownership of data and reporting

The Parkinson's Foundation was able to access PowerPlan's easy to use budgeting and reporting capabilities to prepare its budget and review results and overall performance. Whereas previously, responsibility reporting had to be prepared centrally for each department and program, now staff can generate their own actual P&Ls and make the necessary adjustments to meet budget. They can also drill down to the invoice level, to truly understand their expenses, without having to consult with the Accounting Department.

### Automation of the aggregation process

Moving away from aggregating files manually PowerPlan allows the Parkinson's Foundation team to work collaboratively to assemble the budget.

By allowing staff members to work from one collaborative space, PowerPlan has enabled the Parkinson's Foundation to save time and simplify processes for their budgeting team.

In addition, elimination of the distortions of allocations from department and program P&Ls gives managers the ability to manage the budget effectively, while still complying with GAAP functional expense reporting requirements.

### Excellent Customer Service

During the PowerPlan implementation process, the Parkinson's Foundation was assigned a Project Manager, who became their main resource for implementation. The Parkinson's Foundation team



found their PM to be a great support, and a fantastic resource throughout the implementation process, and beyond. PowerPlan consultants got directly involved to help the Foundation develop an effective system to budget and record allocations, showing outstanding insights into the Foundation's needs.

PowerPlan transformed the Parkinson's Foundation's budgeting process by giving them a powerful, yet easy to navigate system for preparing their budgets accurately.

**Thanks to better budgeting and reporting, the Parkinson's Foundation will be able to maximize the use of the resources entrusted to it by its donors.**

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