

Cooperative Extension Gains Deep Visibility into Grants, Programs, and Finances with Acumatica Cloud ERP

OVERVIEW

For more than 20 years, Cornell Cooperative Extension relied on a legacy financial system and manual spreadsheets to manage its sprawling operations across the state of New York. Growing demands overwhelmed the state-level finance team, and manual processes delayed routine reporting, causing it to take several weeks. As a result, the non-profit turned to Acumatica Cloud ERP and quickly gained real-time visibility into grants, programs, and operations. Acumatica streamlined operations, helping improve the lives of countless New Yorkers.

KEY RESULTS

- Gained instant visibility into all non-profit grants and programs, providing an accurate view of financial health for 65 connected tenants
- Automated manual processes, empowering employees with self-service capabilities and saving countless hours
- Improved reporting responsiveness and eliminated long wait times with real-time information
- Boosted employee productivity and reduced onboarding and training time with an intuitive application
- Implemented a robust financial platform that flexes to support how non-profits operate, handling fund accounting and grant management with ease
- Achieved a connected platform to support ongoing growth and fulfill its mission, improving the lives of New York residents

CHALLENGES

Mounting Service Demands

Cornell Cooperative Extension (CCE) educators connect Cornell University research with individuals and families in neighborhoods, homes, workplaces, and schools across New York. CCE's mission is to help residents raise children, save money, conserve energy, grow and prepare food, sustain farms, grow businesses, and protect the environment.

CCE's 1,500 employees serve residents in 56 New York counties and the five New York City boroughs with programs customized for each county, says Sarah Fox Dayton, CCE Associate Director. Like the Lake Ontario Fruit Program, special programs facilitate collaboration and services across several counties. In addition, 12 Taste NY retail outlets sell food and crafts made in the state. The \$90-million CCE operation receives support from public, state, local, and federal funds as well as grants and contracts.

CCE County office staff range from two people serving the sparsely populated Hamilton County in the heart of the Adirondacks to over 200 in the populous Suffolk County. Suffolk County offers a marine program, comprehensive agriculture programs, and several 4-H youth camps that serve 1.5 million Long Island residents. Each county extension operates independently and employs an executive director and finance officer.

Operational Inefficiencies

All CCE data rolls up to a central finance team, which conducts reporting, analysis, and program and grant tracking. Since the legacy Sage system could not provide the reporting or the financial oversight that CCE needed, the finance team manually processed data on spreadsheets. Furthermore, the legacy software could not adequately monitor compliance across the enterprise.

"We were using a legacy Sage system, which wasn't in the cloud and was pretty antiquated. It ran on Citrix," says Elizabeth Klug, SBN Regional Finance Lead. "We only did a few upgrades and knew we were way behind the times. We missed upgrades because they took a lot of time, especially when working with 65 tenants or databases."

CCE also used the legacy Sage system for financial reporting and managed fixed assets separately. Every office tracked customers differently. They recorded cash receipts in Excel and sent the spreadsheet to a finance person, who had to enter the data into the system.

Getting month-end reports or program financial status updates took more than a month. Since county staff often entered finance data (cash receipts) in monthly batches, acquiring an accurate financial picture proved even more challenging.

The lack of access to timely and accurate information frustrated county executive directors.

"I wasn't able to provide information on the spot when someone asked me about a certain number," says Robert Batt, Executive Director of CCE in Orleans County. "It typically would take me 24-to-48 hours to answer a question."

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Company

Cornell Cooperative Extension
<https://cals.cornell.edu/cornell-cooperative-extension>

Industry

Nonprofit: Land grant extension serving youth, families, farms, businesses, communities, and the environment.

Number of Employees

Approx. 1500 full time employees

Location

New York State


Solution


Acumatica Advanced Financials with:

- Fixed Assets
- Expense Management
- Order Management
- Velixo

Customer Relationship Management use planned.

Customer Social Sharing Details

 www.linkedin.com/company/cornell-cooperative-extension

 www.facebook.com/CornellCooperativeExtension

 www.youtube.com/channel/UCYJZAuVgWYZ17Ib9cwqcU6w

 www.instagram.com/ccecornell

 www.twitter.com/ccecornell

Partner Details



Prelude Consulting Inc.
www.preludeconsultinginc.com

Finding an answer often meant walking down the hall and digging through a filing cabinet or calling someone in finance. Sometimes they had to talk to regional representatives. It took a lot of extra steps to get information that should have been at our fingertips.”

Meanwhile, only 56 employees could access the legacy financial system due to limited licenses. Since it operated on aging servers, the sluggish legacy software crashed frequently and could not efficiently support remote operations. When the Covid-19 Pandemic shut down the state, working remotely created many new challenges.

Lack of Grant and Program Tracking

CCE wanted a new solution that “primarily was cloud-based to bring us into the current century,” says Roxanne Churchill, an SBN Regional Finance Lead. “We also needed it to be very user-friendly because we have a wide range of skills and abilities across the CCE. We also wanted to make sure that we had what we needed for all people and all things; a one-stop-shop, where we could find all information—especially grants and contracts—in one place without having to look at extra spreadsheets.”

In addition, CCE needed an affordable system that could provide fund accounting, easily manage restricted funds and grants, and support numerous users. “If we wanted to involve everyone, we could potentially have thousands of users, and we needed to make sure it wasn’t going to be cost-prohibitive,” Churchill says.

SOLUTION

Intuitive Platform and Centralized Database

CCE’s long-time technology partner Prelude Consulting Inc. recommended Acumatica because the future-proof ERP platform could accommodate strict non-profit requirements while facilitating quick and easy user training.

“We did look at other solutions, but we found that Acumatica was definitely far and above the best,” Churchill says.

The evaluation team determined Acumatica could flex to track specific government grants and programs and handle non-profit accounting.

Acumatica’s subaccount structure and Open API also proved essential during the evaluation process, while the unlimited user licensing helped seal the deal.

Before implementing Acumatica, CCE revamped its chart of accounts, creating a statewide account list that consolidated all 65 entities. Each county finance member agreed to clean up their data to avoid keeping more than one set of books.

“(throughout the implementation) No one was down more than three days, and it went extremely well,” says Donna James, an SBN Regional Finance Lead. “We spent an hour with the users to walk through everything and also had what we called Show and Tells before the implementation to showcase Acumatica’s features.”

Rapid Implementation

CCE deployed Acumatica during the pandemic and did so on time and under budget. “We implemented about three tenants per week. Tenants were easily converted and successfully operating in Acumatica within 1-2 weeks,” Klug says.

In less than six months, the non-profit had 65 tenants up and running with Acumatica’s financial functions.

“Implementation went so smoothly it was ridiculous; there was no downtime. All of a sudden, we were getting things much more quickly,” says Orleans County’s Executive Director Batt.

Coordinated Training Advances Employee Adoption

The statewide finance team of Elizabeth Klug, Donna James, and Roxanne Churchill conducted a training program that resulted in a smooth transition.

“At times, there were over 100 people just watching us walk through everything,” says James, an SBN Finance Lead. “Then we started user group meetings every week for an hour, where we showcase items, different ways of doing things, and shortcuts. Now we do one every other week and have 50 to 60 people staying on for the whole hour.”

Klug adds, “People are also learning from each other. We have users from assistants to manager levels, so the skill sets vary tremendously throughout the state.”

BENEFITS

Full Financial Transparency

Cornell Cooperative Extension instantly gained real-time information access and streamlined processes. Acumatica also provides self-service access to critical financial data, significantly improving CCE’s customer response times for officials and residents seeking reports.

Now Batt answers questions and responds to requests in a minute. “I can look at a receipt from a 4H club or look at a scholarship on my smartphone and approve it instantly. The Acumatica mobile app is fantastic.”

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—Elizabeth Klug,
SBN Regional Finance Lead,
Cornell Cooperative Extension

CCE automated many processes and improved customer service. In many cases, they reduced report creation and distribution from weeks to minutes. They also gained instant access to financial status and could take deep dives into real-time data to identify trends and opportunities.

"Acumatica is amazing. There isn't software out there built specifically for non-profits, but Acumatica is pretty close to handling everything we need. We haven't found anything we can't do with Acumatica," says Klug.

Batt adds, "Educators didn't have access to financial information, they couldn't generate reports, and they were totally dependent on others for this information. Now with Acumatica, they have a great deal of independence, know what their programs are doing, know what budget they have left to spend, and they have more instant decision-making power."

Acumatica's self-service functionality, along with Velixo, a third-party plug-in, allows users to create any report they want so they can see the results instantly. The centralized solution eliminated most manual work and redundant processes.

"Now they (county employees) can set up dashboards exactly how they want and monitor it for themselves using different time periods and different grant periods that often aren't on calendar years," says James.

The training helped county-level employees revise processes and understand the importance of entering information when they receive it rather than recording it later and posting it in batches. "If they input data in a timely manner, it's there all the time so that all reports are live and up-to-date when a person requests it," says Klug. "Before, I had to tell people they needed to wait for two weeks because I was still closing a month. Now they can just run a report for themselves. It frees us up to do other things."

Real-time Reporting

For CCE assistant director Dayton, Acumatica's real-time platform dramatically reduces report generation and increases response times. "There were times when I had to collect data, and it literally took people months to respond," she says. "I remember a specific report a dean wanted on youth and family programs in five counties. It took three days to get the data. When I sent the report, he said it was too late. Now I can get that information in minutes."

For example, creating reports on state agriculture programs like maple syrup production or dairy programs previously took months and were outdated when delivered. "Now I have easy access to that information, and I can meet legislator's deadlines that sometimes are just a couple of hours opposed to a couple of days," says Dayton.

Ability to Close Staffing Gaps Fast

The new standard chart of accounts and standardized processes allow CCE to create instant staff redundancy as needed. For example, when someone goes out on leave, they can find a temporary replacement because they have a single application, the same processes, and the ability to access information remotely.

Further, having a cloud platform expanded its job candidate pool to a broader geographic area. "If we have a vacancy, we don't have to deploy someone in the next county; we can hire remotely," Klug says. "We also have some redundancy in finance, so no one county is left shorthanded."

With countless open positions and a competitive job market, CCE can now offer positions that use the latest technology. "Our previous system was really old and not pretty, functional but not fun," says Dayton. "Early career candidates have high expectations and expect to use modern technology. Acumatica is very appealing to users, and it's fun and easy-to-use."

Higher Participation and Revenue

Having Acumatica running during the pandemic allowed CCE to pivot and respond to new business priorities. The new modern platform helps them efficiently work from home, reduce paper costs, and reach more participants.

Rather than limiting programs to onsite, CCE now offers various programs online, attracting participants nationwide and boosting revenue.

Modern Platform Empowers Mission and Improves Resident Support

CCE uses Acumatica Cloud ERP to manage financials for its 12 Taste NY retail sites with plans to implement the Acumatica for Big Commerce Connector for online store sales. It will also deploy Acumatica's embedded CRM to unify customer relationship management capabilities to drive efficiency throughout the organization.

"CRM is going to be huge. It's a huge time saver," says Klug. "And when we have everyone up and running, it's just going to free up more time for us to concentrate on more important issues."

With Acumatica supporting the entire CCE operation, the non-profit can respond quickly to the changing needs of its communities.

"So much of our work is driven by grants and contracts so having a solution that more easily manages the information, data and documents reduces human labor and the burden of managing contract information," says Dayton. "It also makes it easy for educators to see how they can grow because they have a modern solution to support them."

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