

# Forecasting Growth for Barber National Institute

Barber National Institute (Barber) provides community-based services for children and adults with autism, intellectual disabilities, and behavioral health challenges. With such an important mission and responsibility to their community, Barber needed accurate budgeting and timely forecasting to support their growth. Using Excel for their financial processes was holding Barber back from accessing the appropriate level of analysis to drive critical decisions. Corporate Performance Management (CPM) software from Prophix empowered the finance team at Barber to properly evaluate the profitability of new opportunities, forecast rates ahead of time, and run detailed allocations to track expenses through automation, data consolidation, and deep analysis.

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## Business Challenges

As demand for Barber National Institute's community services and programs grew, using complex Excel files for budgeting became a cumbersome process. It was difficult to trust the accuracy of their spreadsheets, which created risk around properly evaluating future opportunities. An inability to plan for capital expenditures, as well as personnel expenses, prevented Barber from ensuring the necessary level of richness in their forecasts.

Due to the nature of the industry, Barber needed confidence in their multi-tiered allocations. As well, the finance team needed a scalable solution to hold program managers accountable to their budgets, while also providing a better way to analyze and engage with their financials by slicing and dicing their data. Barber National Institute identified a need for a specialized tool for forecasting that would allow them to introduce new programs into their organization and determine the profitability of acquiring new business.

The Barber National Institute was founded in 1952 by Erie educator Dr. Gertrude Barber to provide community-based services for children and adults with autism and intellectual disabilities. Today, the multi-faceted organization serves more than 6,200 individuals annually with a wide range of educational, vocational, residential, and behavioral health programs. Services range from early intervention for infants and toddlers, an approved private school, job training and placement, residential options including group homes, in-home services, and specialized therapies. The organization also provides education and training to educators and professionals around the world. In addition to the main campus in Erie, PA, the Barber Institute provides services in Northwestern Pennsylvania and in the Philadelphia and Pittsburgh regions.

**Operating:** Since 1952

**Website:** [www.barberinstitute.org](http://www.barberinstitute.org)

**ERP:** Microsoft Dynamics GP



## Why Prophix?

The finance team at Barber National Institute prioritized finding a Corporate Performance Management (CPM) software that was easy-to-use, had a similar interface to Excel, could report on financial and non-financial data, and forecast revenue rates for their expenses. After evaluating Workday Adaptive and Prophix, Barber chose Prophix for its customer service, flexibility, and affordability.

## Results

Barber National Institute implemented Prophix to replace Management Reporter and Smart List in their ERP, Microsoft Dynamics GP. By integrating Prophix with Kronos and Carelogic, the finance team can import payroll and revenue data on a weekly, monthly, and annual basis. This data includes various metrics such as client vacancies, home occupancy, capacity, and more.

With Prophix, Barber leverages several approaches to budgeting, including zero-based, incremental, top-down, and bottom-up to create their income statement budget. CAPEX, leases, personnel, and revenue are generated from the bottom-up. Detailed personnel planning allows Barber to conduct personnel variance analysis throughout the year. Being able to plan their revenue in fine detail, such as by client and procedure, means they also have complete visibility to compare revenue rates to plan. Finally, Barber conducts productivity planning for their clinical programs with a dedicated and robust model.

Their finance team no longer spends hours looking for errors in linked spreadsheets. Instead of managing Excel, their finance team can analyze and better understand the budget they're producing in conjunction with program managers. **Automating their budgeting process has saved Barber 360 hours over 22 weeks of their budget season for their budget manager. In addition, they've also saved 540 hours over 16 weeks for four accountants and 160 hours for all program and administrative managers.**

Given the richness and detail of Barber's budgets, forecasting has never been more trustworthy or relevant. Before Prophix, by the time a forecast was complete, the process took so much time that the data was no longer relevant. Now, Barber can comfortably run profitability forecasts for acquiring new businesses and cost per unit forecasting.

Scenario planning and forecasting have allowed Barber to better plan for the impact of increasing salaries and request reimbursement rates by using a cost per unit analysis. Their finance team can easily conduct in-depth wage analysis, giving them greater visibility into their largest expense.

Before Prophix, the finance team had to spend at least three days preparing a profitability scenario and then upload it into their ERP to analyze the data in Management Reporter. **Now, they can create a profitability scenario in a couple of hours.** The finance team also runs scenarios overnight so managers can have an updated report every morning during budget season. On-the-fly forecasting also allows Barber to plan anywhere from one month to five years into the future, depending on the project.



The finance team at Barber National Institute also leverages Prophix for internal reporting. They report on financial and non-financial metrics, including average wages, vacant beds, occupancy, program capacity, variances, cost per unit analysis, and more. By automating their reporting, Barber can spend more time understanding their data rather than gathering it from across the organization.

**Program managers used to spend one week producing a weekly productivity report. Now, it takes the finance department 15 minutes or less to run the same report as it is fully automated.**

Dashboards allow Barber to track net income, 14-month trend, budget vs. actual variance analysis, occupancy, capacity planning, productivity planning, and cost per unit analysis. By utilizing dashboards, their users can look at the big picture and drill into the details behind their financial and non-financial data.

**Barber National Institute has saved 8+ hours every month by automating their financial processes and putting efficiencies in place with Prophix.**

## Future Plans

Barber National Institute plans to migrate to Prophix Cloud to leverage Prophix Analyzer, Microsoft 365 enhancements, and other cloud-only features. They also have plans to do cash flow and balance sheet planning with Prophix.

***“Prophix has improved every single aspect of our budgeting process. Instead of spending time setting up the budgeting process, we are instead able to better analyze and understand the budget/product that we are producing in conjunction with the program managers.”***

***– Emily Anauo, FP&A Systems Developer, Barber National Institute***

## About Prophix

Your business is evolving. And the way you plan and report on your business should evolve too. Prophix helps mid-market companies achieve their goals more successfully with innovative, cloud-based Corporate Performance Management (CPM) software. With Prophix, finance leaders improve profitability and minimize risk by automating budgeting, forecasting and reporting and puts the focus back on what matters most – uncovering business opportunities. Prophix supports your future with AI innovation that flexes to meet your strategic realities, today and tomorrow. Over 1,500 global companies rely on Prophix to transform the way they work.



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