YPTC FINANCIAL REPORTING DESIGN AND AUTOMATION

CASE STUDIES: HOW YPTC DELIVERS STRONGER REPORTING FOR STRONGER NONPROFITS





AT YPTC, our mission is to help as many nonprofits as possible grow stronger. Our in-house financial reporting design and automation experts help our accounting professionals deliver board-ready financial reports that put the information you need at your fingertips. We automate manual report preparation, saving you billable hours that you can use for more strategic support. We also build dashboards that allow you to monitor KPIs in real time, and visualizations that make reports engaging to read and easy to understand. With our automated, professional reporting, you'll gain clarity and make more confident financial decisions.

CASE STUDY: CUSTOMIZED DASHBOARDS AND FORECASTING HELP A FAITH-BASED CAMP RECOVER FROM NATURAL DISASTER

TRANSFORMING FINANCIAL REPORTING FOR REAL-TIME OPERATIONAL GUIDANCE

THE CLIENT

A FAITH-BASED CAMP AND RETREAT CENTER that provides programming, lodging, food service, waterfront access, and outdoor activities for guests, campers, and families on a $2+ million annual budget. The organization had established month-end reporting and forecasting, but department leaders needed financial information that could guide decisions during the month. In addition, the camp was impacted by a severe flood that damaged roads and camp grounds, interrupted operations, reduced revenue, and created restoration costs that were not fully covered by insurance. They needed robust financial modeling to fully consider the various options and scenarios they could face on the road to recovery.

THE OPPORTUNITY

- **MANAGING SPENDING WITH REAL-TIME INFORMATION:** Department leaders received budget-to-actual reports two to three weeks after month-end, which provided important historical data, but did not provide real-time data that allowed monitoring of current-month spending.
- **MONITORING CHANGING ACTIVITY LEVELS:** Program spending, especially for maintenance and food service, needed to reflect real-time fluctuations in attendance and registrations.
- **SCENARIO PLANNING FOR MORE CONFIDENT DECISIONS:** Leadership needed to understand the financial impacts of flood remediation and available funding so they could be confident in planning their next steps.

OUR APPROACH

- **CREATED SELF-REFRESHING DASHBOARDS** that accounted for current-month transactions and displayed real-time budget-to-actual results for each department.
- **IMPLEMENTED A STRONGER, INTEGRATED FORECASTING PLATFORM** with built-in quality controls, reducing reliance on spreadsheets with formulas that could break or produce unnoticed errors.
- **REPORTED ON ORGANIZATION-SPECIFIC KPIS**, such as cost per plate for food service, so leaders could align spending and food orders with the latest estimate of the number of meals to be served.
- **BUILT MULTIPLE SCENARIO MODELS** showing the financial impact of various flood damages and restoration repairs, including using different levels of reserves, insurance proceeds, and donations to cover costs.

THE RESULTS

- **REAL-TIME FINANCIAL PERFORMANCE VISIBILITY:** Department leaders could monitor current-month activity against budget instead of relying only on reports issued after month-end.
- **MORE INFORMED OPERATING DECISIONS:** Food service leaders could track cost per plate and use that information to guide ordering and meal planning as registrations changed.
- **CONFIDENT DISASTER RECOVERY PLANNING:** The executive director and board could clearly see how various approaches to navigating flood recovery could affect the camp's financial position.
- **TRANSPARENT FUNDING NEEDS:** Visual reporting clarified the portion of flood-related costs that insurance would not cover and showed how donations narrowed the gap.
- **STRONGER REPORTING CONTROLS:** Integrating forecasting and financial reporting in a single platform reduced the risk of broken spreadsheet formulas, misaligned calculations, and less reliable forward-looking information.

THE IMPACT:

FINANCIAL REPORTING BECAME A MANAGEMENT TOOL.

Department leaders gained information they could use during the month, while the executive director and board gained a clearer view of possible outcomes following a serious disruption. The organization could explain its funding gap to donors, monitor how the gap changed as additional support arrived, and protect the reserves it had worked so hard to build.



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