



Corporate
Renaissance
Group

CRG Cost Allocator Helps Envision Quickly Complete Cost Allocations with Ease

“Cost Allocator gives us the ability to perform detailed analytics. We can complete projections on the allocated amounts within the system as well as different “what-if” scenarios.”

Ray Janutis, CFO
Envision Unlimited

About Envision Unlimited

Founded in 1964, Envision provides quality services to persons with developmental disabilities and other special needs that promote choice, independence and community integration.

Envision provides a wide ranging array of homebased and centerbased services that benefit families, infants, children, adults and senior citizens.

Program areas include: early intervention, community living, older adult services, youth and family support services and day and employment services.

**CRG Cost Allocator is Certified
for Microsoft Dynamics GP**



Overview

Envision Unlimited, a community-based nonprofit organization, needed an easier, faster solution to allocate costs to the various programs. As a nonprofit organization, Envision needed to ensure that its resources were being used efficiently and effectively.

Envision had two options available: (1) to develop a customized solution or (2) purchase a cost allocation software solution, Cost Allocator. After an evaluation, Envision chose Cost Allocator.

Cost Allocator gives Envision the ability to easily allocate costs to the appropriate area in a timely manner. Cost Allocator is easy to use, provides flexibility and, as a supported solution, offers peace of mind.

Situation

Envision is a community based nonprofit organization that provides a variety of services to more than 1,500 persons with developmental disabilities and other special needs in Chicago.

In order to correctly assign costs to the right programs, a single Envision employee used a report writer for its general ledger system and stored the results in a file in the general ledger system. The cost allocation process to calculate and reallocate the allocations was very time consuming; consequently allocations were only completed once per month.

Envision was only able to complete the allocations. It was not able to do “what if” analysis. Additionally, it was not able to do projections on the allocated amounts within the system.

It was obvious to the Envision team that the current method of allocating costs was inefficient and did not meet its current or future needs.

Solution

Envision, along with their partner WIPFI, considered two options for replacing its cost allocation solution:

1. Develop a completely customized application
2. Purchase a cost allocation software solution – Cost Allocator

After evaluating the two available options, Envision chose to purchase CRG Cost Allocator. There were a number of factors that lead to its decision:

- ▶ The total cost of ownership for Cost Allocator was significantly lower than developing a customized solution. In addition to the lower cost to acquire the software, Cost Allocator is a supported application and will be easy to upgrade in the future.
- ▶ Another large, nonprofit organization recommended Cost Allocator.
- ▶ Envision has a very large Chart of Accounts. It needed to be able to calculate and allocate large amounts of information: Cost Allocator can easily be able to handle large amounts of data.
- ▶ Cost Allocator allows Envision to allocate costs based on percentage amounts. It is the same methodology used prior to selecting Cost Allocator; Envision did not have to alter its allocation methodology. Envision is able to upload the allocation percentages using Excel.
- ▶ Cost Allocator is a supportsoftware solution.

Benefits

Flexibility

Cost Allocator gives Envision a great deal of flexibility for performing allocations. Cost Allocator provides Envision with the ability to change allocation rules in the future; which is beneficial as the organization grows, changes and adapts. Additionally, Cost Allocator is also flexible enough to model different allocation assumptions.

It is fast and easy to solve allocations with Cost Allocator. This gives Envision the flexibility to complete allocations on an as needed basis, not just monthly.

Easy of Use

Cost Allocator is an easy software solution for Envision to use.

- ▶ Allocation calculations are completed in same manner in Cost Allocator as in the original solution. Envision was not forced to change the method in which it completed allocations
- ▶ Envision has the ability to upload allocation percentages using Excel. This feature makes the allocation process much simpler.
- ▶ Cost Allocator can be used by many people within the organization. The previous solution, due to its complexity and its time-intensive nature, was used by only one person. Additionally, all employees, present and future, have access to the cost allocation logic.
- ▶ Envision can easily perform analytics on the allocated costs. Not only do they complete “what-if” analysis, they can also complete projections on the allocated amounts within the system.

Support

As Cost Allocator is a supported software solution, Envision does not have to worry about the expense or lost time associated with problems or future upgrades. As a nonprofit with limited funds, knowing what the annual operating costs will be makes Cost Allocator a more attractive solution.

About Corporate Renaissance Group

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