

Philadelphia Care Foundation



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– Marcel Klieverik, Controller, Philadelphia Care Foundation



Faced with rapid growth, regional distribution, and an increasingly complex regulatory framework, the Netherlands' Philadelphia Care Foundation turned to Cognos planning and business intelligence software. Now, being able to easily budget and report on costs and revenues per location and per client lets regional managers assume more responsibility for results. And because users can immediately see the consequences of changes in the system for all levels of financial planning, it's easy to work with multi-year budgets or see the consequences of a government measure.

Challenges Faced

The Philadelphia Care Foundation (Stichting Philadelphia Zorg) is a Dutch networking organization for people in need of care and support. Regardless of cause, disability, or age, Philadelphia helps them live their lives as independently as possible. Based on a Christian world view, the foundation offers services for living, working, and leisure. It also provides policy and consulting services. Philadelphia has 775 small-scale locations distributed across 23 regions. Its 9,300 employees serve 10,500 clients.

Ten years of considerable growth, compounded with its regional distribution, had left the Philadelphia Care Foundation with many data sources but little insight. It also needed an information structure that would help them maintain a high level of client care while responding to the new regulatory environment. The organisation was facing such legal and regulatory developments as the new Social Support Act (WMO), changes to the Exceptional Medical Expenses Act (AWBZ), and the requirement to register and report more fully on care provided to clients.

These increased requirements placed pressure on the organization's government-supplied resources. “In light of these developments, we wanted to be able to budget more accurately and to move from a cost-based budget

Industry

- Healthcare

Geography

- Netherlands

Information Needs

- New budgeting method
- New budgeting structure and reports
- Access to existing data sources

Platform

- Microsoft Windows 2003 server
- Microsoft SQL server 2000 (database).

Solution

- Enterprise planning
- Reporting and analysis
- Web-based user interface

Benefits:

- Up-to-date, detailed information on clients and regions
- Availability of reliable management information
- Responsibility for the results at the right level
- Creation of simple analyses and prognoses

to a flexible, results-based budget,” said Marcel Klieverik, Controller for the Philadelphia Care Foundation. “The new system had to give us an up-to-date view of the costs and revenues at client and regional level, allowing us to manage our organization more efficiently and in a more focused way.”

Strategy Followed

Philadelphia went in search of a new budgeting methodology and a product capable of supporting it. The solution had to fulfil a number of requirements. It had to make use of existing sources of information, be able to combine information in reports in any desired form, and improve cost control at the lowest possible levels in the organization.



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“We were already acquainted with Cognos through ReportNet. So we discussed with them the possibility of using their Enterprise Planning software as a solution,” said Klieverik. “Together we developed a model that allows the regional managers to easily budget and report on costs and revenues per location and per client. A web application gives them access to a data warehouse with information from our financial, client, personnel, and salary administration systems.”

A budget calculator developed in-house by Philadelphia handles the translation of the data in the source systems into the formats required by the Cognos financial planning software. “This had to be done in a very specific way, adapted to our organization,” said Klieverik. “It is important to us, for example, that you can enter personnel costs based on number and location, and make a distinction between the different kinds of care provided.” The Enterprise Planning solution also allows the actual costs and revenue to be recorded and compared with the budget.

Benefits Realized

Philadelphia has successfully completed the first budget using the new system, and the experience has been very positive.

“The new system was very well received,” said Klieverik. “With Cognos, we can quickly put important and reliable information, such as expenses and revenue by client and location, in the hands of our management. Previously, they had to fight their way through bundles of paper; now it is simply a matter of clicking through an application. This makes it possible to assign regional managers more responsibility for the results. After all, they have the information they need to manage performance in their region.”

The solution also provides the flexibility Philadelphia was looking for. “You can easily change data and immediately see the consequences for all levels of financial planning,” says Klieverik. “This allows you, for example, to pass on the consequences of a government measure or work with multi-year budgets.”

The Philadelphia Care Foundation also recently implemented Cognos business intelligence. “At Philadelphia, we use Cognos Enterprise Planning for our financials,” said Klieverik. “By combining this with business intelligence, we can now see and understand our organization’s work from other points of view. We also plan to implement scorecarding to measure our performance.”

About Cognos

Cognos, the world leader in business intelligence and performance management solutions, provides world-class enterprise planning and BI software and services to help companies plan, understand and manage financial and operational performance.

Cognos brings together technology, analytical applications, best practices, and a broad network of partners to give customers a complete performance system. The Cognos performance system is an open and adaptive solution that leverages an organization’s ERP, packaged applications, and database investments. It gives customers the ability to answer the questions — How are we doing? Why are we on or off track? What should we do about it? — and enables them to understand and monitor current performance while planning future business strategies.

Cognos serves more than 23,000 customers in more than 135 countries, and its top 100 enterprise customers consistently outperform market indexes. Cognos performance management solutions and services are also available from more than 3,000 worldwide partners and resellers. For more information, visit the Cognos Web site at <http://www.cognos.com>.

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