

A non-profit aid organization, AVANCE (Uh-vahn-say) digitizes its operations for improved efficiency and real time finance tracking, while utilizing freed up physical space to restructure the office for social distancing.



Michelle Hyde, Chief Financial Officer
AVANCE, San Antonio, TX

“With DocuWare, we know how much money we have left in the grants and what’s still pending for payment - it was nearly impossible to keep up with purchase orders and funds remaining in each grant before we went digital.”

San Antonio
AVANCE[®]
Unlocking America's Potential



Location: USA
Industry: Non-Profit
(Service Provider)
Deployment: Cloud
Department: Human Resources,
Finance

AVANCE operates early childhood and family education centers and has automated processes such as purchasing and funds tracking to assist its Finance and HR teams.

AVANCE operates about 30 early childhood education facilities for children under the age of five in San Antonio and beyond, enabling their parents to learn infant care and other parenting skills, earn their high school diplomas, attend professional training or attain employment.

The daycare centers need to buy a gamut of supplies from formula to diapers to furniture - this generates many purchase orders. Prior to DocuWare, the company relied on paper purchase orders, which made the approval and acquisition process slow and cumbersome. "We were looking to move away from paper into an electronic system," says Michelle Hyde, Chief Financial Officer at AVANCE.

The benefits of digitizing

Digitizing sped up purchasing approvals and data entry. Prior to DocuWare, staff filled out paper purchase order forms that were sent for approval via interoffice mail or by FedEx. "We used to have paper Purchase Order (P.O.) books, which we would issue to each department and they would prepare the paper purchase orders," Hyde recalls. Now

requestors fill out electronic purchase order forms via a web link and these are submitted instantly. Digitizing also reduced manual data input, saving time.

Automation delivers real-time data

As a non-profit organization, AVANCE relies on a variety of head start grants to purchase childcare supplies and other necessities. Items must be matched with and only charged to corresponding grants. That means that one purchase order often draws funds from multiple grants. With a paper system, tracking and matching ongoing purchase orders and figuring out the remaining available balance of the grants in real time was not possible. "We were essentially blind to what people were buying" Hyde says. "Therefore we did not have an accurate and up to date idea of what was left in the grants to spend."

Installing DocuWare allowed them to automate the task using a script that tallies up outstanding purchases and produces a report. "It was nearly impossible to keep up with purchase orders and funds remaining in each grant," Hyde says. "Now we know what's still pending for payment and how much money we have left in the grants." The report also shows which vendors have been paid and which are still pending.

"We got rid of our file cabinets and used that space to rebuild cubicles for social distancing!"

"We used to have paper Purchase Order books, which we issued to each department. Now purchase orders are done online"

Social distancing and recycling made possible by digitization

"We recycled 20 to 30 green paper packs, which we had once used for check reports, to be used for arts and crafts for the children's programs," Hyde says, adding that other departments were also able to repurpose their old paper stock similarly.

But one of their biggest gains turned out to be the additional physical space! Going from paper files to digital ones allowed AVANCE to remove a multitude of file cabinets that were once used to store paper documents. The office space vacated by these file cabinets proved vital during the pandemic and was put to very good use. AVANCE used this extra space to build and update more cubicles to safely accommodate all their employees who returned to work. "We used the space for rebuilding cubicles for social distancing," Hyde says.



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