

ScaleNorth Case Study: The YMCA of Central Florida

ScaleNorth Turns Complex Systems into Everyday Wins for the YMCA of Central Florida



“ScaleNorth has helped us in every area of accounting. They streamlined our payables, strengthened our controls and simplified reporting. NetSuite is powerful-but-complex, and ScaleNorth customized it to fit our association and made it work for us.”

Dawn Trent

Controller at YMCA of Central Florida

For over 140 years, the YMCA of Central Florida has been a cornerstone of community life across five different counties. Serving hundreds of thousands of residents every year, the nonprofit is known for its focus on youth development, healthy living and social responsibility.

With 15 family centers, multiple program sites, and a robust network of community partners, the YMCA of Central Florida offers everything from after-school programs and summer camps to wellness initiatives, chronic disease prevention and aquatic safety.

Behind the scenes, the organization manages a complex operation that rivals many midsize businesses. From membership services and donor engagement to program scheduling, financial oversight, and staff management, the YMCA's scale requires strong systems to keep people, programs and resources aligned.



Company:

The YMCA of Central Florida

Location: Orlando, FL



Company: ScaleNorth

Location: Santa Ana, Calif.



Making NetSuite More User-Friendly for Everyone

The YMCA wanted its new ERP to feel more user-friendly for everyday users, not just its power administrators. *“Our concern was we were getting references to third party apps on the NetSuite side, but those references weren’t very good,”* says Trent.

For example, one of those early referrals involved a payable application that slowed processes down versus improving them. The YMCA also invested in NetSuite’s Planning and Budgeting tool but later returned to Excel for budgeting and forecasting. *“We’re a little gun shy when it comes to third-party apps because we were sold a Cadillac that didn’t deliver,”* says Trent.

Another NetSuite partner recognized the YMCA’s struggles and referred the organization to ScaleNorth. The team was hesitant to switch partners at first. After all, it had already invested heavily in the system and wasn’t sure it wanted to bring in another partner. That mindset changed after the team’s first meeting with ScaleNorth.

This operational complexity is exactly why the right technology foundation matters, and why missteps in software implementation can impact the entire organization. A longtime Oracle user, the YMCA initially implemented NetSuite in early-2023. *“It was a good implementation that helped us update processes like our general ledger,”* says Dawn Trent, Controller, *“but a lot of customization needed to be done in the backend to make it user-friendly for our association.”*

The organization was facing challenges across nearly every area of its finance operations. Fixed asset reporting took too much time, payable processing remained manual and payment workflows lacked proper controls. The team also needed a clean connection for ACH payments, smoother general ledger uploads and easier reconciliations.

“After sharing our concerns and all these roadblocks, they honestly eased my mind.”

–Dawn Trent

Controller at YMCA of Central Florida

One of the first tasks was a basic depreciation expense report that had caused repeated issues. ScaleNorth delivered it quickly and with little effort required from the YMCA team. That early success showed the YMCA it had found the right partner.

Instead of adding even more third-party apps to its tech stack, the YMCA focused on making NetSuite work with ScaleNorth's support. For example, the partner replaced the failing payments tool with SquareWorks, which automated AP, tightened controls and provided dependable support. The switch gave the YMCA a stronger process for payables without adding complexity for staff members who spend most of their time with parents and donors rather than behind a desk.

Key Improvements

ScaleNorth has helped the YMCA streamline key processes and move closer to a paperless environment. The team strengthened payment processing with solid internal controls and introduced scanning to simplify AP and eliminate the need for paper checks.

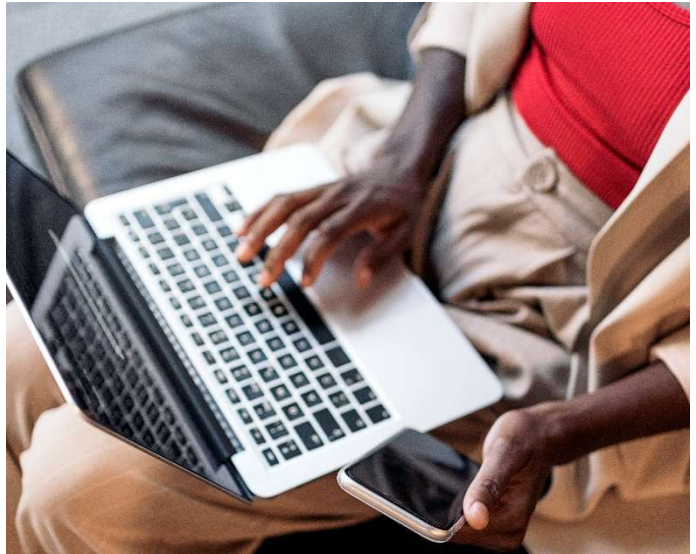
"We were printing paper checks and trying to get away from that because of snail mail delays and other issues, we knew we'd be able to increase our buying power by paying quicker, so making this move has really helped us."

—Dawn Trent

Controller at YMCA of Central Florida

ScaleNorth also improved the YMCA's reporting processes and redesigned its chart of accounts so that its various physical locations could easily understand their financials. Managers who don't usually work with financial data can now review results against budget and make faster decisions.

These changes shortened the month-end close and gave the YMCA a stronger foundation for forecasting and future planning.

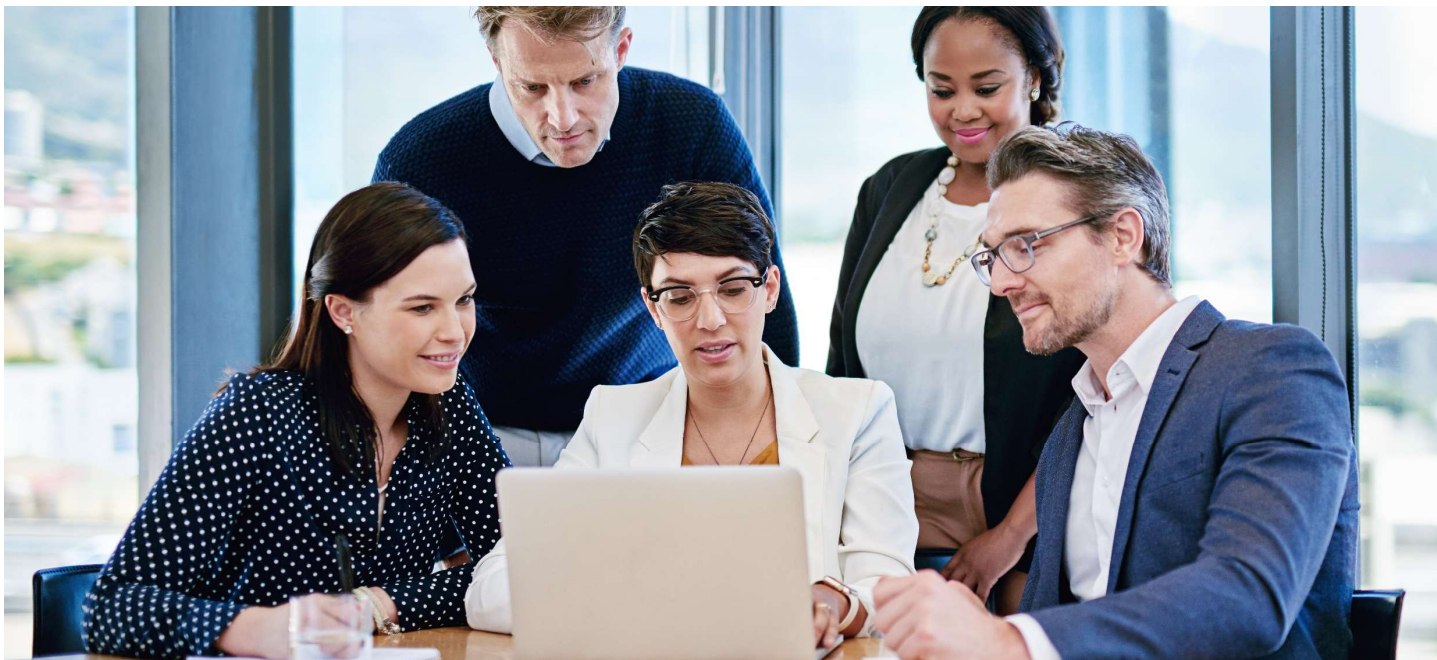


Resolving Issues on the Spot

With ScaleNorth's support, the YMCA runs its system more smoothly and keeps operations moving without roadblocks. The team now produces reports quickly, resolves issues on the spot and meets deadlines even under audit pressure.

"Any time we run into an issue, ScaleNorth responds right away and helps us turn things around quickly," says Trent. "They don't just fix problems; they look at how we're working and suggest better ways so we avoid roadblocks in the future."

The YMCA can also move at the pace it needs. The finance team creates reports for auditors in minutes instead of hours and processes payments without delay. This has boosted confidence in NetSuite and strengthened the YMCA's partnership with ScaleNorth.



A New ERP Doesn't Have to be a Heavy Lift

With the right technology foundation in place, the YMCA of Central Florida can spend less time on systems and more time serving people. For best results, Trent encourages other YMCAs to focus on finding the right partner. *"ScaleNorth has helped us in every area of accounting," she says. "They streamlined our payables, strengthened our controls and simplified reporting."*

With its customized, user-friendly ERP in place, the YMCA improved its fixed asset reporting and wants to create a process where purchase orders flow automatically into assets without the need for staff rework.

The organization's next priority is to improve grant management and dive deeper into the not-for-profit module.

ScaleNorth is already guiding that effort by reviewing current processes and helping the organization plan its next steps.

For Trent, the measure of success is simple: fewer roadblocks and faster results.

"I'd recommend ScaleNorth to any YMCA or nonprofit. They listen to our concerns, respond quickly and deliver real results. NetSuite is powerful-but-complex, and ScaleNorth customized it to fit our association and made it work for us."

-Dawn Trent

Controller at YMCA of Central Florida
