



TARGET OF PEAK PERFORMANCE® | BUDGETSENSE® | REVENUESENSE® | TRAINING | SUPPORT SERVICES

With Operations Under Control, Berlin-Boylston RSD Shifts to Long-Term Planning

Berlin-Boylston (MA) Regional School District

“Our focus is no longer on transaction processing, thanks to BudgetSense®. With operations streamlined and under control, we can now start thinking more strategically. I will be encouraging my school administrators to start thinking four to five years out. We will move on from day-to-day thinking and shift to a long-term view. This will allow us to plan wisely and avoid costly expenditures that result when dealing with emergencies. We won’t be able to plan with 100% certainty; however, our process will prepare us to deal with a variety of scenarios.”

- John Roy, CPA, Director of Financial Services

Challenge

Replace problem-ridden DOS legacy software, rebuild financial services staff and proficiencies, work with school administrators to rebuild confidence and trust in financial information.

Solution

Reconcile all important account balances and adjust to actual, revise account structure, articulate vision for the future, select UniFund’s BudgetSense software to fulfill vision.

Benefits

Streamline all major accounting cycles to eliminate duplication, automate tasks, and introduce school-district workflow processes. Develop reliable financial information and deliver it in real time to improve the quality and timeliness of decision making.

Berlin-Boylston Experiences a Complete Turnaround within One Fiscal Cycle

It didn’t take long for John Roy to decide that Berlin-Boylston needed to invest in a better accounting system. After seeing BudgetSense for the first time, he thought he “had died and gone to accounting heaven.” He adds, “As a CPA, I am a huge fan of Microsoft Excel® and when I saw the flexible export and import features in BudgetSense, I knew that it was the software I wanted to use in the future.”

It’s Easy to Understand Why Berlin-Boylston Is Now Ready to Start Planning for The Future

In just 12 months, Berlin-Boylston’s networked accounting system could produce accurate budget information in seconds, not weeks. The toughest part of John Roy’s job was getting his administrators to believe in the accuracy of the numbers. “I actually had to convince people to trust them. It was so shocking to the users of the system that they even had to adjust their own decision-making timeframes.”

For the first time ever, school principals and office staff have access to information right at their workstations— budget status reports, requisitions in process, purchase orders, unencumbered budget balances, salary and wage expenditures.

Indirect Benefits a Plus

Year-end CPA audits are now uncontested and are completed in less time. “Even my state reports receive a ‘clean’ opinion,” notes Roy.