



HELPING K-12 SCHOOLS
Achieve Greater Financial Control
and Office Productivity.



WINDOWS-BASED SOFTWARE FOR MUNICIPALITIES, K-12 SCHOOLS, COUNTIES AND SPECIAL DISTRICTS

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

Lincoln Intermediate Unit No. 12 Puts BudgetSense® and UniFund to the Test

Lincoln IU No. 12 (New Oxford, PA)

"If your product (BudgetSense) is going to flub up, it's going to do it here." It hasn't yet!"
- George Fike Jr., Director of Business Services

At-a-Glance

Staff	1,400
Budget	\$140 Million
Account codes	60,000
Cost Centers	157

Challenge

With Special Education representing 70% of the annual budget, it is essential for the accounting system to have the flexibility to report on spending and related funding, down to the student level. Moreover, sophisticated cost accounting and allocation models must be developed on assumptions that all stakeholders accept. Organizational change is essential to success.

Solution/Strategy

Initiate a phased, multi-year project that generates annual improvements; synchronize new and challenging initiatives to the ability of the organization to absorb them; select an outside organization that can provide the needed software solutions, project planning assistance, training and integrated support services.

Benefits

Develop accurate and timely financial information for the organization, and in greater detail for numerous (157) cost centers; produce timely cost center information that can stand up to the scrutiny and demands of audits by numerous independent agencies.

Lincoln IU Rises to the Challenge, Transforms into a Model Pennsylvania Intermediate Unit

When George Fike took over the reigns as Director of Business Services at Lincoln, he compared the accounting and financial challenge to that faced by many large corporations. General Motors, for example, with multiple divisions, and within each division—Chevrolet for example—has various geographic and operating divisions, profit centers, cost centers, and strategic supplier alliances. The analogy helped the Director communicate to his organization the challenge that lie ahead, specify the software and IT resources that would be needed, and set forth criteria for selecting a vendor who would be capable and willing to help him achieve his mission.

Fike's Creative and Comprehensive Strategy

George Fike realized that the overall solution involved (1) partnering with a trusted outside vendor and (2) developing an internal organizational culture that would welcome, not resist, change. It required top to bottom changes in attitude, buy-in to goals and objectives, and commitment to planning and execution by executives and mid-level managers.

"Believe it or not," Fike offers, "a major part of our early success in building credibility and confidence is attributed to your FundSense software product." With FundSense, Lincoln was able to get to square one by producing accurate and timely financial information, and had been able to establish financial control over resources entrusted to it. These positive outcomes emboldened the team. "As importantly, it afforded us the opportunity to work with UniFund, and to evaluate the company's ability to work with us on a larger, more challenging scale," added Fike.

With the release of the enterprise-powered version of BudgetSense, Lincoln became confident that it had the company and the product with which to work and bring Lincoln to its intended destination.