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SAU 55's Migration from BudgetSense® V2 to V3 Was a Classic Example of Effective Change Management

NH SAU 55 – Timberlane, Hampstead

“One of the smartest things that we did was to bring all the staff in early to let them see how life will be. It was important to keep everyone involved in the project.”

- John Holland, Director of Technology

At-a-Glance

Staff	900
Students	5,350
Budget	\$53M
Districts	2

Challenge

Migrate from BudgetSense V2 to V3 in 90 days, starting in April and finishing in time to produce the first payroll of the next fiscal year in the first week of July. Everyone had to leave their comfort zone—at the worst possible time of the year—a monumental change management challenge.

Solution

- Trust the advice provided by UniFund's project personnel
- Complete pre-conversion clean up work in the old system
- Get all staff on board early and accepting of the challenge
- Hire additional temporary personnel to help maintain the old and new systems
- Budget a little more for training

Benefits

The conversion turnaround time took only two days, the most important milestone in the project. BudgetSense V3 went live in late May, allowing staff to prepare purchase orders for the upcoming fiscal year and to prepare for the first July payroll run.

Server Capacity Was First Hurdle to Overcome

With tight project deadlines already set, project director John Holland credited UniFund's IT staff for keeping the project on track, right from the start. “We certainly appreciated Scott Hansford's help to assess our needs, configure requirements, expedite delivery, and install BudgetSense V3,” says Holland.

Strategic Project Advice Generously Offered, Gratefully Appreciated

Having good information to work with in the new system eliminates a lot of time-consuming clean-up work, leaving more time for training on the new system. Joan Davis, UniFund's senior project manager for V2 to V3 migration projects, offered SAU 55 valuable advice during the process. “Joan was terrific to work with, and I'm glad we followed her advice,” adds Holland. “She made our staff very comfortable with the plan and its milestones, had a good style of interviewing to determine our preferences and business rules, and she prepared very detailed task sheets for us to complete—including deadlines.”

'The Coolest Thing'

SAU 55 Payroll Supervisor Kathy Smith was responsible for bringing payroll live for the new fiscal year. With a 900-person payroll, divided between two districts and an SAU administrative office, Kathy didn't have much time at first to appreciate all the subtle improvements that BudgetSense V3 had to offer. Now, she thinks one of the “coolest things” is the way BudgetSense corrects initial payroll funding mistakes, such as when position is attached to the wrong account code. “The ‘correct payroll funding’ is the coolest thing,” says Kathy. “It goes back though all previous payrolls and automatically makes adjusting journal entries.” A few months after the installation, Kathy was promoted to assistant business manager, which is also very cool.