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### The Customer

Union County College (Union) is an institution with a mission of transforming their community one student at a time. This mission is guided by a commitment to empowering students to achieve their goals by providing access to high quality and affordable higher education. As a comprehensive community college with a diverse student population, they provide career programs, transfer programs, developmental education, and lifelong- learning opportunities, with a focus on excellence in all that they do.

Union, a community college in Cranford, New Jersey, enrolls nearly 12,500 students, has 500 full-time employees and has a budget of approximately \$70 million.

Donna Farlow is the Director of Budgeting at Union. Donna has a BA in Education and a BS in Accounting and Information Systems Management, as well as an MBA and a CPA. She has been with the College for 12 years. Prior to coming to Union, Donna worked with several organizations, including a Fortune 500 company where she implemented new budgeting software, trained budget managers and did budgeting and forecasting for the corporate departments in the company.

### The Problem

Donna describes the process before BudgetPak: “It was primarily done on paper and then keyed into Excel. Thirty page Excel workbooks with instructions would be printed and sent out to people who would handwrite in their information. All of the information was then manually keyed in and summed. When I started emailing the Excel worksheets out, we found that people were printing the sheets and typing or handwriting them. It became very obvious that many didn’t know how to use Excel. So it was very challenging.”

Re-entering information and rechecking formulas were some of the greatest problems with the previous system. The process was extremely time-consuming and full of uncertainty. “It took months and months of checking to make sure that you hadn’t missed anybody or anything. Then the next challenge was to pull it all together in a timely way for management review. Often in order to answer their questions we had to go back to paper documents. It was very overwhelming,” explains Donna.

Some of their budgeting challenges were dealing with six union contracts, integrating a variety of funding sources, and reacting to changes in student population dependent upon state and federal funding. Being dependent on the county for capital funding impacts their ability to plan for asset purchases or building improvements.

With a manual system in place it was impossible to budget on a monthly basis. Only annual budgets were created. There was just not enough information for management to make informed decisions.

### The Evaluation and Implementation

There were many reasons to re-evaluate the budget process, but the biggest driver for change was management’s desire to do more. “They want to see monthly budgeting; they want to see unit involvement in forecasting and an annual rolling forecast,” says Donna. She realized that they were not using the right tool. “Excel really wasn’t the right way to be doing what we were doing, and we needed something more centralized.”

After careful consideration of available alternatives, including the budget module in their general ledger system, the College selected BudgetPak as its new budgeting system. BudgetPak was the best fit, with tools for both financially oriented people and, perhaps more importantly, an interface that was intuitive to those less comfortable with numbers.

# Union County College Case Study

Implementation and training were the keys to a successful launch. "The training and installation went really, really well. There was no problem loading all the software, getting it up and running. And the training that [XLerant] did with me was excellent."

One of the greatest obstacles in any implementation is ensuring buy-in from faculty and various departments. Donna describes the Union process: "To make people comfortable - that's the ultimate challenge. I met first with the faculty and let them know what the college's budgeting goals were, explained how we were trying to create a link between financial resources requests and our strategic plan. I then held open lab sessions where faculty could come on their own time to get experience in using the new system."

## The Solution

With BudgetPak in place, Union estimates that time spent budgeting will be cut by 50%. And just as importantly, the college faculty is more involved in the budgeting process. Each person is able to not only input their numbers, but also provide detailed rationales about requests for funds. Donna shares that, "One thing we really like is the ability to document our assumptions. In other words, to put down what the money is going to be used for, how we came up with that number, and what goal we are achieving by spending this money."

In terms of integration with Union's general ledger system, Donna found that it was "unbelievably easy" to load actuals from her general ledger system into BudgetPak, and to export the final budget out of BudgetPak back into her general ledger system.

Reflecting on their first budget cycle using BudgetPak, Donna explains how engaging the new system is – especially for non-financial users: "With BudgetPak it is just so much easier to access historical data to understand where you are now versus where you were in previous years. You can quickly make comparisons and then document why you're doing it differently. It's all right there at hand, and that makes it so much easier for everyone, particularly for the non-financial people."

Donna shared that even the "critics" were won over. "There are always a few faculty inclined to be very critical of administration. We had one faculty member who was very skeptical of the new system, but after using it for the first time, he said to me 'Oh wow! That was really easy' so that was a huge win!"

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