

## Amity Regional School District #5, Connecticut Streamlining Financial Processes with Munis and Tyler Content Manager

*Winner of 2010 Tyler Public Sector Excellence Award*

**Industry:** School District

**Location:** Woodbridge, CT

**Employees:** 316

**Students:** 2,549

**Budget:** \$43 million

**Tyler Products Used:** Munis<sup>®</sup>, Tyler Content Manager

**Years as a Tyler Client:** 10

**The Facts:** The Amity Regional School District #5 is located in a suburban community northwest of New Haven, Connecticut. Set in the rolling green countryside, the District consists of three schools that educate more than 2,500 students each year: Amity Regional High School located in Woodbridge, Amity Regional Middle School Orange Campus and Amity Regional Middle School Bethany Campus. Coinciding with their mission to “Enable every Amity student to become...an effective world citizen,” the District recently launched a District-Wide Literacy Initiative aimed at improving the literacy skills of older students.

**Contact:** Terry Lumas, Finance Manager

Terry.Lumas@reg5.k12.ct.us | www.amityregion5.org

### Key Challenges

- Implement a cost-effective solution to “do more with less” without adding staff
- Reduce paper consumption and save money and time spent copying, mailing and filing documents
- Streamline time-consuming manual approval processes
- Improve ability to track, manage and audit financial records

### Benefits: Financial and Beyond

- Realized ROI in hard and soft cost savings such as reduced paper, printing and storage costs, and positive staff adoption
- Increased staff efficiency by implementing a fully electronic financial system, eliminating previously manual processes
- Improved public relations as seen in four consecutive years of budgets being passed on the first attempt in all three member towns

### Why Tyler?

- Tyler has more than 30 years of experience in the K-12 school software and services industry
- Tyler provides all consulting, product enhancement, implementation, training and support services
- The Munis ERP (enterprise resource planning) suite is a fully-integrated software solution
- Tyler is the largest sole provider of software and services for the public sector, covering all solutions for ERP (Financial, HR, Citizen Services and Pension), Document and School Management; Land and Vital Records; Appraisal and Tax; Courts and Justice; and Public Safety

### Amity Regional School District Best Practices

- Utilized hands-on training, KnowledgeBase instructions and one-on-one help to prepare employees for process changes
- New processes were implemented one at a time to gain employee buy-in for future implementations
- Departments were transitioned one-by-one to each new process, resolving parameters specific to each group before adding more users

### In Their Own Words:

“The estimated annual cost savings [of using Munis] is \$87,337. The District’s ROI shows a payback of less than one year. This is an extraordinary return on investment.”

- Terry Lumas, Finance Manager

...continued on reverse

# Amity Regional School District #5, Connecticut

## Streamlining Financial Processes with Munis and Tyler Content Manager

### The Challenge: Increase Efficiency by Eliminating Manual Processes

A school district's financial operation is a high volume, labor intensive and critical function—a fact the Finance Office at Amity Regional School District #5 in Connecticut knows well. The District processes between 3,500 and 4,500 purchase orders a year and manages more than 4,000 vendors. For years the Office relied on manual processes and reams of paper to generate purchase orders, approve requisitions, create invoices, enter and track employee time sheets and more. Inefficient and time-consuming, documents were hard to track, employees were spending too much time waiting at copy and fax machines, and storage space was at a premium. “We were faced with increasing workloads, time-consuming document processing, lack of storage area and files, demand for greater efficiency and a tight budget,” explained Terry Lumas, finance manager for the District. “Without the opportunity to add staff, we needed to find a cost-effective solution.” That solution was Munis.

### Implementation and Training Best Practices

Used in conjunction with Tyler Content Manager (TCM), Munis provides Amity Regional School District with a fully electronic system for streamlining financial processes. District departments were transitioned one at a time to the new processes and each individual process was implemented separately, helping the District gain buy-in from employees at each step. Hands-on training, Munis Knowledgebase instructions and on-on-one help—including follow up sessions to answer questions—ensured employees were comfortable with the new processes. This comfort was especially evident following the District's implementation of functionality for sending direct deposit advices to employees electronically. “...This was the shortest implementation and yet had huge time and cost savings,” explained Lumas. “Most of the staff was extremely pleased and this in turn provided a very positive feeling toward the implementation of the rest of the new processes.”

### Realizing a Significant Return on Investment

With Munis and TCM fully implemented, the District began to see results almost immediately—results that the District continues to see as Tyler continuously enhances Munis features and functionality. Now, instead of manually generating and distributing purchase orders in quadruplicate, employees can create, distribute and archive POs with one press of a button. Requisitions that were formerly printed, hand signed and manually delivered to the Finance Office are now tracked and delivered online. Electronic filing has eliminated the need for filing cabinets and hand filing. Employees have direct access to payroll records and can electronically enter timesheets into Munis Employee Self Service. And document approval that previously took days to complete now takes hours or even minutes.

All-in-all, Terry estimates that the District saves more than \$5,600 annually by eliminating the need to purchase pre-printed forms and copier paper. And more than \$11,000 is saved each year by electronically transmitting direct deposit advices to 90% of employees. According to Lumas, “The estimated annual cost savings is \$87,337. The District's ROI shows a payback of less than one year. This is an extraordinary return on investment.”

### Soft Cost-Savings Add Up

And that's just the hard savings. The District has also seen substantial soft savings since implementing Munis 10 years ago. Audit reports are greatly improved to the delight of the District's auditors. There is almost universal (97%) positive feedback from staff regarding Munis' user-friendliness and employees' ability to access valuable information. And Lumas and her staff have been the recipients of prestigious GFOA awards for financial reporting and budgeting.

Perhaps the most striking impact Munis has had on the District is on its relationship with the public. For four consecutive years the District's operating budget was passed on the first attempt in all three member towns, an amazing feat for any school district. “From our experience, a Tyler user with similar problems should feel comfortable implementing the Munis applications,” concluded Lumas. “The training and resources provided by Tyler are second to none. Most importantly, the end result is fantastic. How can somebody be against doing something more efficiently for less money?”