

A Case Study of OrgSync's Budget Management System

In participation with Bowling Green State University

Bowling Green State University is a public, four-year university located in Bowling Green, Ohio. With 18,000 students including graduate students, Bowling Green State University is home to roughly 340 student groups and organizations. The campus has a policy that requires student organizations to keep organization funding on-campus. After struggling to find a solution that met their specific needs, the university entered into a development partnership with OrgSync to create the Budget Management System.

The Problem

THE NEED FOR A DEVELOPMENT PARTNERSHIP

Bowling Green State University's first in-house budget system, which operated through file-maker, was originally developed by a staff member to help manage the budget allocation process and store records from year to year. With the in-house system, students still had to submit their budget requests via paper and, on average, 1,800 requests were processed into the database each year. In addition, during the budget allocation process, each of the 270 organizations were required to submit 12 copies of their budget, one for each of the members of the funding committee, that were on average 15 pages long per packet. Students also carried the burden of bringing reimbursement and vendor payments to multiple areas of campus for approval.

The in-house table structure was both complex and vulnerable to the skill set of the staff. Unfortunately, the staff member who created the in-house system eventually left and forced the university to either scratch the system and start over, go back four years and start tracking the budgets in excel, or find a third-party budget management system that would match the needs of student organizations. BGSU searched for multiple third-party vendors and was unable to find a solution that met their needs; thus, the campus entered into a development partnership with OrgSync and four other campuses.

When asked about the development partnership, Kelly Jo Larsen stated, "I personally loved the process because it allowed me to give back a lot of very specific feedback. OrgSync was more than receptive to any of the feedback and 90% of our feedback was worked into the final system itself. I felt like it was a real development relationship not some fancy title."

The Solution

BUDGET MANAGEMENT SYSTEM IMPLEMENTATION

Bowling Green State University initially piloted OrgSync's Budget Management System (BMS) with 50 hand picked organizations that were active and had multiple types of payment, funding and reimbursement processes. After the pilot groups put the system through its paces for three months, the university launched more groups onto OrgSync. BGSU's major obstacle during the implementation process was transitioning from a paper based process to an online system. The pilot groups were a success and the Budget Management System was implemented across campus.

A NEW BUDGET PROCESS

With the new OrgSync budgeting process, students first build and submit their budgets through OrgSync. Next, the 12 funding committee members review the budget requests by referencing last year's audited statements, current organization account balances, budget requests, and other information all through OrgSync. The organizations then come in one by one for a hearing in front of the committee who references all the information through OrgSync. Once the hearing is over and the committee reaches a decision, the allocation is entered into OrgSync and goes live in the spring.

FUNDING/REIMBURSEMENT REQUESTS

The second step of the process allows student organizations to submit funding and reimbursement requests through OrgSync. Students login to OrgSync, pull up the event they are requesting funding or reimbursement for, upload their receipts, and then send it off to be reviewed by the office

of Student Activities. The university requires multiple reviewers to approve the funding and the approval workflow is done automatically through OrgSync. Once approved, the request moves to accounts payable and is given to the organization.

The Results

FROM PAPER TO PAPERLESS

OrgSync's Budget Management System completely transformed Bowling Green State University's budget allocation and reimbursement processes by taking a paper based procedure and moving it to an online system. Students love the ability to make budget requests, submit reimbursement forums, and manage balances all from home at any time. Advisors are also grateful to approve budget and reimbursement requests through OrgSync because there are no longer students camping outside of their offices needing their signature to approve a \$75 reimbursement form; it is approved through OrgSync.

TIME SAVINGS

OrgSync's Budget Management System has significantly decreased the amount of graduate staff allocated to the funding system allowing them to actually use their accounting skills, instead of copying and pasting all day. It has also started functioning as the sub-ledger to the university's

official ledger by tracking student organization expenses on a granular level.

UNPARRALLELED SUPPORT

"OrgSync's service and support is always great, but I've also appreciated the fact that I know if there is a problem with the BMS I can call in and it will be fixed. The BMS got a bug in it the day before one of our weekend retreats and on Friday at 7:00 the budget system would not launch. I had 100 groups coming in before Monday with all of this information in OrgSync, and I couldn't get it to launch. I called my Campus Consultant who answered her cell phone, and the problem was fixed within ten minutes. I know that the support will be there and I don't worry about what happens if this crashes and I lose my budget. So there's the security sense of it. Not to mention it's very user friendly."

IMPROVED USAGE ACROSS CAMPUS

The Budget Management System has even facilitated more extensive use of the organization portals. As more students are visiting OrgSync on a regular basis, they are getting more activity in their portals, making them look more visually appealing, and inviting more members to join. With the Budget Management System, Bowling Green State University has seen an uptick in events, forums, news posts, and more.

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- Kelly Jo Larsen

Find This Case Study Online at
www.OrgSync.com

For more information:
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Success Story

"It became this sub-culture that if you were the treasurer of one group you were the treasurer for every group you were involved in because the treasurer position was so intimidating and complex. We had this problem of self-selecting slots of people who ended up being tasked with doing all of the treasurer's responsibilities, whether or not they wanted to be.

Our students who are not in business organizations now finally feel like they have the skill set to build a budget. I was talking to the treasurer of the art history association, who maybe had one class in the college of business. She came in after she built her budget and said, 'I finally felt like I knew what I was doing rather than staring at a blank excel document wondering where to start.' With OrgSync, you no longer have to be an undergrad accounting major to be the treasurer."



Kelly Jo Larsen
Coordinator of Student
Organization Programs



270 OF 340

Organizations Use the
Budget Management System



\$1.1 Million

Allocated Annually



43,200

Fewer Pages Printed Per Year