The Bloomington & Normal Water Reclamation District

Case Study Snapshot

Utility district reclaims efficiencies. Sage Intacct helps Bloomington and Normal Water Reclamation District save tens of thousands annually.

The Situation

While Sage 100 worked well for the organization for decades, remote access capabilities and the desire to automate manual tasks prompted Bloomington and Normal Water Reclamation District (BNWRD) to look for a modern, cloud-based replacement solution.

The Solution

BNWRD decided to migrate to Sage Intacct, because of the long-term success it enjoyed with Sage 100, its relationship with its Sage business partner, and the solution's powerful capabilities.

The Benefits

Sage Intacct is delivering new efficiencies across the organization, freeing resources for more valuable, strategic tasks.

- Saving tens of thousands of dollars annually

- Monthly financial reporting time cut by 75%

- Integration with third-party apps eliminates days of manual data entry monthly

- Sage Intacct aids in the organization's retention and recruiting efforts by empowering employees

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– **Tim Ervin**, Executive Director BNWRD

The Full Story

Clean Water Commitment

BNWRD has been keeping the Twin Cities' water clean since 1919 when the residents of Bloomington and Normal, Illinois, voted to create a sanitary district. BNWRD is a local environmental agency that serves more than 133,000 residents by safely, efficiently, and economically recycling wastewater. In addition, two experimental wetlands help remove contaminants from water while offering flood prevention and providing habitats for wildlife, hiking trails, and places to watch birds and animals. Across its two large treatment plants and multiple smaller facilities, BNWRD employs 34 individuals. It's a lean staff, so the organization strategically invests in technologies that boost productivity and empower every employee. Sage Intacct is a clear fit for BNWRD's strategy.

Cloud Migration Is a Strategic Step Forward

"We had been using Sage 100 for over a decade," recalls Tim Ervin, Executive Director for BNWRD. "It's a solid system that performed exceedingly well for us. Yet, like organizations everywhere, remote access became a top priority during the pandemic. So, we chose to migrate to a cloud-based financial management application that would support a work-from-anywhere model, improve data security, and free our limited IT resources for other initiatives."

Tim says the organization never seriously considered any application but Sage Intacct. "We've had such good luck with Sage over the years and have a great relationship with our Sage business partner, Forvis Mazars, so Sage Intacct was the logical next step in our digital transformation."

Smooth Transition From Sage 100

Tim believes that one of the reasons Sage Intacct works so well for the organization is because of the solution's flexibility. BNWRD worked with Forvis Mazars during the implementation to map policies and procedures into Sage Intacct workflows. "We tweaked many of our existing processes during the implementation and actually improved them, eliminating or automating many steps," he explains. "Due to Sage Intacct's flexible configuration options, we didn't require any customization to meet our needs."

The migration from Sage 100 to Sage Intacct moved smoothly. With assistance from Forvis Mazars, BNWRD successfully migrated three years of data from seven companies into Sage Intacct. "In my 25 years in government, I've never seen a transition go more smoothly," Tim recalls. "Everyone participated in the process, helping design the workflows that best fit their roles. I credit the software, Forvis Mazars, and our dedicated staff for the success."

By leveraging the dimension capabilities in Sage Intacct, Tim says the organization was able to simplify its previously unwieldy chart of accounts. "Using the dimensions also makes it easier for our non-accounting staff to identify the correct accounts for posting since the descriptions are clear and concise."

Objectives Met — Goals Exceeded

BNWRD had numerous goals for the transition. "We had many business processes that required too much paper and too many manual tasks," explains Tim. "While remote access and reduced IT burden were critically important, we also wanted to eliminate paper

and promote streamlined, efficient workflows."

One of the paper-intensive, manual workflows Tim refers to was financial reporting. Each of BNWRD's locations is a separate entity, requiring separate financial statements—but the organization also needs to prepare consolidated financial statements, a task that previously took days.

"We used to have to export reports from each of our seven entities and import them into Excel to produce consolidated financial statements," Tim explains. "Now it's nearly instant. I can produce the financials in one step in Sage Intacct. I'd estimate that we've reduced the time it takes us to produce monthly financial statements by 75%."

And rather than print and manually distribute the reports, Tim has configured the report scheduler in Sage Intacct to automatically generate the reports he refers to daily. "I have the reports run overnight and delivered to my inbox every morning," he says. "Other reports, like the balance sheet and income statements, come to me weekly. Before, I had to switch between companies and print seven sets of reports. I've also scheduled the income and expense reports to be sent to our department supervisors and our board automatically. It's so convenient and makes a real impact in our productivity since we all start the day with current data."

Bank reconciliation is another area where BNWRD sees efficiency gains. "Bank reconciliation used to take five hours each month, but with Sage Intacct, we've reduced that by more than half—to less than two hours," reports Tim.

Integration Drives Efficiency

Sage Intacct was designed to integrate with third-party applications, via its robust import and export capabilities as well as a software interface that allows Sage Intacct to exchange date with other applications.

BNWRD uses an outsourced payroll provider and imports the data from the provider directly into Sage Intacct, where the entries are electronically reviewed and approved. "This eliminates the manual journal entries we used to perform, and it gets rid of stacks of paper," notes Tim. "Over the past two years, as a direct result of Sage Intacct and other improvements, we

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>
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have eliminated 14 filing cabinets. It's an enormous step forward in efficiency."

As part of its operations, the organization invoices commercial customers for wastewater delivered to the facilities. The process begins when on-site staff record the transactions in a spreadsheet. Previously, staff emailed the spreadsheet to the accounting office where staff would rekey the data into Sage 100. Now, the accounting staff simply imports the spreadsheet data into Sage Intacct. "It's faster and more accurate," Tim says. "I'm sure it saves an additional several hours every month."

Similar efficiency gains come through streamlined residential customer billing workflows. "We used to spend a full day compiling the data for the invoices," says Tim. "Now we import the data, and the whole cycle takes less than two hours."

Empowering Staff to Reach Higher

In addition to the efficiency gains and time savings BNWRD is realizing with Sage Intacct, there is another powerful and unexpected benefit. "Our staff are using the time savings to take on more challenging and strategic tasks," Tim explains. "By doing so, they are advancing their positions and earning higher wages. We've already seen a positive impact on our retention rates and our ability to hire new personnel. People want to know their work is valuable and important, and by eliminating routine tasks, we're acknowledging our team members' significance to the organization."

The Outcomes

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Business Technology Services at Forvis Mazars provides enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, and support services. We help organizations define and execute their digital transformation journeys.

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