

CASE STUDY **INCREASED EFFICIENCY, DECREASED REDUNDANCY: THE PAPERLESS BUSINESS OFFICE**



THE PINE SCHOOL

> OVERVIEW

The Pine School was founded in 1969 in Stuart, Florida by a group of people who wanted a more rigorous academic environment for their children than public schools at the time could provide.

Today, The Pine School has a K-12 student body of more than 360 students. Its college preparatory curriculum focuses on STEM fields and is supported by a technology partnership with MIT. As part of their emphasis on universal technology integration within the school, they implemented BYOD and 1:1 programs throughout various grade levels. The Pine School is a member of MISBO, the National Association of Independent Schools (NAIS), and the Florida Council of Independent Schools (FCIS).

The Pine School has been certified a Green School of Excellence since 2012 because of its heightened commitment to responsible sustainability. In addition to a student-led Environmental Prefect Committee (which focuses on weekly recycling pick-ups as well as a range of activities and events focused on raising awareness), The Pine School supports an array of steps to promote “Green” living. Their campus houses a student-designed garden (a favorite hands-on project for our Lower School students) that provides fresh produce for the dining hall’s daily salad bar.

> CHALLENGES

With its designation as a green school and its location on a wildlife preserve, The Pine School has gone to great lengths to limit their impact on the environment, using laptop programs, smart classroom initiatives, and digital textbooks for many classes. There was, however, one place within The Pine School that continued to produce a lot of paper: the business office.

After consolidating its campuses, The Pine School had very little on-campus storage. The physical records from the business office were overtaking their limited space, with records older than two years requiring an off-campus storage facility. The school needed to go paperless, but it wasn’t possible with their previous software, which required physical copies of everything from applications to invoices to reporting.

> GOALS:

In order to achieve its green certification, The Pine School needed a paperless system. And they needed that system for more practical reasons too. A paperless process would help already-stretched resources become more efficient.

Prior to switching to FACTS, The Pine School’s business and admissions offices were spending too much on costly processes such as mailing paper statements or re-enrollment packets to their families. Delinquency reconciliation was also an issue in terms of printing and

mailing. Of course, the cost of paper and postage was only one of the problems with their processes. They also needed to minimize the time it took their team to create, print, and stuff the statements and other correspondence into envelopes before mailing them. The process was inefficient and frustrating for everyone involved—and it was clear that going paperless would solve several issues.

> THE SOLUTION:

Once the Pine School realized the importance of going paperless, they began searching for partners who provided the best fit. While the administration weighed the benefits of several different partnerships, they made an easy decision to partner with FACTS.

After more than 40 years of using paper records and manually processing transactions, the transition to a paperless office required a significant adjustment—and collaboration across many of the school’s departments. “It took a lot of thought and planning. And it took a lot to execute,” says Virginia Allen, assistant business manager at The Pine School. “It also took a lot of commitment from many people to make the transition happen. Going paperless can’t be a business office thing or an admissions thing. It has to be a process undertaken by the whole school,” she adds.

Once FACTS was in place, it didn’t take long for everyone to see the benefits. Their previous system required weeks of coordinating information and reconciling payments between the back office

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and the business office before they ever sent payment requests to parents. On top of that, the business office entered charges into their system student by student, year after year, to manually process the checks.

What were the biggest impacts of converting to FACTS? Virginia immediately mentions “the time management benefits, the personalized service, and the ability to customize the entire process right down to reporting. Overall, it’s just easy, and “once you’re into the system, the process is so much easier and so much less time-consuming all the way around.”

While going paperless to save resources and storage space was the main priority, another key benefit of converting to FACTS has been a reduction in the delinquency—with the school’s delinquency rate coming in at about .02 percent of their accounts receivable. “Our delinquency rate is laughable...That’s the most defining piece about FACTS for our school. It’s a huge improvement,” Virginia says. “If I was going to rank FACTS so that other schools would understand what they offer, I’d say the first thing is their outstanding AR. It’s above and beyond,” she adds.

With all of the work involved with converting to a paperless system, Virginia is thankful for the support the school received from the

FACTS team. She maintains, “It was about being able to reach out and speak to people. We looked at other systems, but they were faceless. I think that when you’re able to put a name and face together—and know that those people are there to back you up—that carries a lot of weight in making a decision.”

How did the school’s parents handle the transition? “I didn’t hear a single parent complain about the new process,” Virginia exclaimed. “And to me, silence is golden.”

> **RESULTS:**

Converting to FACTS helped turn The Pine School paperless, saving time and resources, conserving limited storage space, reducing duplicate entries that resulted from manual processes, and achieving their certification as a green school. FACTS also improved cash flow and forecasting, and reduced delinquency.

While cost and time savings are important, The Pine School’s commitment to its families also played into the decision to go with FACTS. As Virginia points out, “We’re not a big school. So our fingers touch each aspect of our families’ lives in that we are the stewards of their children’s education from start to finish. That’s a lot of responsibility. Knowing that you have real people on your side is great.”



“To go green, all it takes is commitment,” maintains Virginia. If people are looking at it from a cost standpoint, it’s less costly to do this than it would be to do it in-house. You’re crazy not to make the transition to FACTS. Crazy not to... We’ve kept our payroll in-house because it’s so small, and we’ve outsourced everything else to FACTS. Save a tree. Heck, save a forest.”