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**TO: Vermont House Committee on Education**

**FROM: Heather Bushey, CPA, Director of Finance**

**DATE: March 11, 2021**

**RE: Testimony on H.91 An Act relating to the suspension and review of the statewide finance and financial data management system**

Thank you, Chair Webb, and Members of the Committee, for this opportunity to provide testimony on H.91. My name is Heather Bushey and I want to speak to you today about my experience as an eFinance user. I am a Certified Public Accountant in the State of Vermont and I am the Director of Finance at Essex Westford School District (EWSD). I began my career in public accounting where I performed audits of small companies, non-profit organizations, and employee benefit plans. Prior to joining EWSD, I worked at a large non-profit health care provider as their Chief Financial Officer. Throughout my career, I've had the opportunity to participate in and lead several software conversions of varying sizes and complexity. There are some consistent themes present in all of the conversions that I have been part of; the change is always difficult, there is always a learning curve, and when moving to a new system there is functionality that is gained and functionality that is lost. EWSD's eFinance conversion was consistent with those themes.

EWSD converted to the Powerschool eFinance system on July 1, 2020. We have been using the system for a little over eight months and I believe we are just starting to come down the other side of the learning curve. That learning curve is difficult. Every task takes longer than it did in the past as you learn how to operate with new processes and a new system. Despite this learning curve, we continued to be able to successfully navigate our day-to-day financial, payroll, and human resources responsibilities. We are reconciling our operating bank account in the system. We are preparing quarterly payroll tax and compliance filings using data from eFinance. We are doing quarterly financial reporting for our Board using the system and we prepared our FY22 budget using eFinance.

Just like every other software that I have used, eFinance is not a perfect system. It definitely needs to be improved and what I believe is important is to have a software vendor that is responsive to its users and is willing to incorporate user feedback toward future enhancements of the software. In my experience as a member of the SSDDMS Governance and Change Advisory Board, I believe that PowerSchool is committed to hearing user experiences from Vermont and is willing to work with us to make improvements to the system.

Reporting is one of the areas within eFinance that many users have identified as being deficient. The Governance and Change Advisory Board established a Reporting Subcommittee to work with Powerschool to identify critical reporting needs and the criteria that are needed for each report. The Reporting Subcommittee has identified six critical reports that PowerSchool is working to create as part of their reporting package and we are continuing to discuss other reporting needs that should be prioritized.

In addition, many VT users have identified a need for more training to enhance their understanding of eFinance. In response, the AOE worked with PowerSchool to establish a series of trainings that are being delivered over the next several weeks to all users who are currently live in the system.

Finally, Powerschool is actively working on enhancements to the bank reconciliation functionality so that School Districts can reconcile their payroll bank accounts using the reconciliation module within the system. Powerschool met this week with AOE and finance staff from Vermont School Districts to review their proposed modifications. We are collaborating on finalizing the modification document this week.

I am encouraged by the partnership between eFinance, the AOE, and School District staff and I am hopeful that we will be able to move forward with making enhancements to the software that will continue to improve the user experience.

Given the scope of the current software enhancements that are being implemented by Powerschool, I support the AOE's proposal to pause further implementations for six months to allow time for these enhancements to be incorporated into the software before we transition additional School Districts onto eFinance.

As a current user of the system, I have concerns about the way that H.91 is currently drafted. The language appears to end the project until future legislation is taken to reinstate implementation. As a District that complied with the legislation to convert to eFinance, it creates a feeling of uncertainty about the future support and cost of using the State mandated system. In addition, the bill suggests the implementation of a Statewide Finance and Financial Data Management System Advisory Group and I would suggest that group already exists in the SSDDMS Governance and Change Advisory Board and we are already doing most of the work as outlined in H.91.

Again, thank you for your time today and I am happy to answer any questions that you may have.