

## FINANCIAL AND ACCOUNTING SOLUTIONS

From the smallest primary school to the largest secondary school, Edtech has accounting and financial management solutions ranging from a full accounting service to training, consultancy and support as required.

***“Edtech’s tailored approach is the key. Everything works the way we need it to work – we’re really happy.”***

***Debbie Waikato,  
Principal – Lincoln Heights School***



# Seamless financial services for Lincoln Heights School

**A shift to Edtech has given Lincoln Heights School a tailored financial services solution that is efficient and reliable and meets the school’s key requirements, including preparing annual accounts and delivering accurate, timely information to the Principal, Board, Management and Auditors in a format that drives effective decision making.**

Lincoln Heights School in Waitakere, Auckland had contracted an external financial services provider to support its in-house accounts person and Executive Officer, but the school was dissatisfied. Lincoln Heights School Principal, Debbie Waikato, who was on the school’s Management team at the time, says the core problem was that the service was not tailored to the school’s needs.

“We wanted a provider with proven experience and skills, that could demonstrate flexibility, provide continuity and meet the school’s requirements cost effectively. After investigating potential providers – and a cost/benefit analysis by the Board and Management team – Edtech emerged as the clear winner,” says Debbie.

She describes the school’s transition to Edtech as ‘seamless.’ Edtech was already providing ICT infrastructure services and MUSAC software support to the school, which helped the decision to extend the relationship.

“We knew how Edtech worked and were happy with the

service. We also know Edtech’s client base is growing and that it has a good reputation in the Education sector,” says Debbie.

Edtech works closely with Debbie, the Executive Officer and accounts person to provide a comprehensive range of services and support. This includes full data entry, preparation of annual accounts and monthly financial reports for the Board of Trustees, and advice and guidance on school financial matters – such as the budgets. Edtech also ensures the school is up-to-date with any changes and meets all statutory reporting requirements.

### ***A tailored approach***

In 2008 Debbie became Principal, and Edtech Financial Services Accountant Shobhna Patel took over the relationship management. As a Chartered Accountant, Shobhna has the ability, knowledge and experience to advise the school on any financial matters. She visits the school regularly to provide support and advice. Shobhna collaborated with Debbie to establish the school’s requirements and find ways to help Debbie transition into her role. Starting with a review of the school’s existing financial system, Shobhna made recommendations to help meet the identified requirements and make the school’s financial systems and processes simpler, more streamlined and more structured. ▶

# Seamless financial services for Lincoln Heights School

◀ In the first year, Shobhna worked with the school's existing chart of accounts to ensure annual accounts would be delivered on time in accordance with MoE reporting deadlines. At the same time, she undertook to put a new chart in place by the new calendar year.

"Edtech is great at providing information for the monthly Board report in a way that makes sense for everyone," Debbie says. "Staff understand the information and can easily use it to make decisions – and I have the information I need to do my job effectively."

## **Flexibility and seamless continuity**

Over the course of its relationship with Edtech the school has weathered many changes. Edtech's flexibility, adaptability and open, transparent communication when facing change has been much appreciated, says Debbie Waikato.

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"Edtech has sustained a very high standard of service throughout major milestones at our school – including new Board members, Principal and Executive Officer, and a ten year property plan," she says.

"With events like these it's of key importance to be able to communicate effectively and clearly with our financial services provider. Not once have we had cause to question the support and service we receive from Edtech."

Having one point of contact who knows the school is a key benefit. Debbie says Shobhna 'listens carefully to what we need and then finds a way to make it happen.'

"She is very proactive, often bringing us new information and options she thinks we might find interesting or beneficial. Edtech is part of our team – which is really important.

Shobhna consistently provides a high standard of professional service, with a personal touch. We love having her on the team."

Debbie says the school is very satisfied with the service Edtech provides. "Edtech's tailored approach is the key. Everything works the way we need it to work – we're really happy."

## Highlights

**Lincoln Heights School is a full primary school in Waitakere, Auckland, with approximately 530 students and a staff of almost 50.**

### Original problem

- Financial services provision unsatisfactory
- Service not tailored to school's needs
- In-house accounts/finance staff not well supported

### The Edtech solution

- Tailored service to meet key requirements
- Financial expertise and knowledge – including MUSAC financial programs
- Full data entry including preparation of annual accounts
- Accurate, timely monthly financial reports
- Financial information onsite and easily accessible
- Annual financial services support agreement with regular scheduled visits; transparent communication
- Advice and guidance on all financial matters

## About Edtech

Edtech is the market leader in providing sophisticated, specialist ICT solutions to New Zealand's Education sector.

Founded in 1992, Edtech's value proposition is in its unique ability and track record of working with schools to help them build and manage integrated ICT systems spanning ICT infrastructure; electronic administration, financial and accounting solutions; software hosting solutions; and the Edtech-developed Ultranet Learning Management System.



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