

Frequently Asked Questions

About *Balance*

What is SaaS?

Software as a service (SaaS) is a software distribution model in which a third-party provider (Allovue) hosts applications (*Balance*) and makes them available to customers over the Internet.

What is the *Balance* software platform? How does it work?

The *Balance* software platform is an online system comprised of three individual modules, Budget, Manage, and Evaluate.

Budget: Within *Balance Budget*, users can collaboratively build complex staffing and spending plans in an online environment. Budget allows users to assume roles within the budget building process, either builder, viewer or approver, allowing additional stakeholders to plan or view budgets with restricted access for strategic planning and review.

Manage: Using *Balance Manage*, our users can view account balances and track spending in real time. With our transaction monitoring and custom reporting, users can easily search and track purchases by vendor, description or other transaction-level information and generate and share reports with other members of their team. Additionally, using account filtering, districts can parse and filter financial data to analyze spending by year, fund, program or any other segment for granular level analysis.

Evaluate: With *Balance Evaluate*, districts can examine the distribution of expenditures against underlying drivers and performance measures, revealing insights to drive strategic decisions. Using our school profiles, equity reports and scatter plots, you can better engage your stakeholders and members of the community with a transparent understanding of school expenditures and spending efficacy.

Who uses *Balance*?

Balance users vary across school districts but generally include Superintendents, District Administrators, CFOs, Budget Directors, Grant Managers, and Principals.

Why does *Balance* only serve K-12 education?

Generally, school finance systems are designed to support a multitude of industries such as manufacturing, wholesale distribution, hospitality, sales, advertising, warehouse management, government and healthcare, so they don't fit the needs of education leaders who are making decisions to increase student growth and achievement.

Balance was designed by educators specifically to support the complex needs of K-12 budget managers. Users have the ability to customize their experience through the use of filters, custom search options and the ability to show or hide only the information that is most important to them—such as a specific grant or program.

Why is it important to be able to tie spending back to locations?

In light of upcoming ESSA requirements, districts will be asked to demonstrate their spending by school and by source. Using a software like *Balance* will allow districts to report that data accurately and expediently. Even if a district believes that their specific state won't require this level of reporting, this requirement will still be noted on the district's state report card and could prompt members of their community to question their spending allocations. Having this information at the ready in *Balance* will engender profitable conversations with your public.

My district is very centralized and principals don't have much autonomy. How can Balance help us?

With just a few people handling resources for the entire district, you have the opportunity to do strategic school by school comparison using *Balance Evaluate* to ensure that those centrally purchased resources are distributed appropriately at each of these schools. Public funding demands accountability for how those funds are used and allocated. With *Balance* functioning as your internal communication tool, you'll have insights to pinpoint the exact resources that are being provided to each school in your district.

Does Balance only help with access to financial data?

Balance has the ability to store a variety of non-financial information as well so that spending can be analyzed against these data points. For example, some of our districts load the student achievement scores of a particular program or initiative. *Balance* can then display the budget or spending for this same program across locations to help school leaders determine cost effectiveness.

Other information that can be stored in Balance includes:

- Enrollment (aggregate by school and/or by grade)
- School performance measures of progress and growth
- Free and reduced lunch % by school
- ELL % by school
- SPED % by school
- Position counts or FTE (by full-time/part-time)
- Meals served (for food services analytics)
- Square footage by location (for facilities analytics)

Implementation

Is Balance difficult to implement?

Balance was designed from the ground up to ensure accurate, timely data is available to our partners faster and with less effort than any past technology integrations they've experienced. Our 45-day typical implementation process means you can spend less time and resources getting *Balance* up and running and more time analyzing your spending habits and making strategic decisions. Download our Integration Sheet for more information about implementing *Balance*.

What's your up-time?

Over the last two years we have been able to maintain 99.9999% uptime, excluding scheduled maintenance outages that rarely exceed ten minutes.

Will it replace my established ERP/school finance system?

Balance does not replace your school finance or accounting system. *Balance* sits on top of your existing system and imports all required data nightly for fast reporting and access. *Balance Budget* can export its data and use existing bulk import file formats for any ERP.

Once we sign the contract, will we own the Balance software?

When you agree to implement *Balance* within your district, Allovue will license the product to you according to the agreed contract stipulations. Allovue will remain the sole owner of *Balance*.

Is Balance cloud-hosted or hosted on premises?

Balance is cloud hosted using Amazon AWS. We do not offer an on-premise model.

Can I configure Balance to meet my needs?

Balance is designed to work with any chart of accounts structure, so no matter how your district organizes its financial data, we can load it into *Balance* with your labels and values. We also can load an unlimited number of non-account data like purchase order numbers and vendors for transaction data. *Balance* also allows school districts to organize their budgets however they'd like; there's no restrictions on who can plan what budgets or staff. You can create as many individual budgets with as many budget builders, approvers, or viewers as meets your needs.

Security

We manage tons of personal and confidential information. How secure is Balance?

Most of the data in *Balance* is public information, but we treat it all as sensitive and private. All customer credentials are encrypted and application accounts passwords are encrypted at rest in our databases. Any Allovue staff accounts on customer systems (VPN or application) required for data encryption are also encrypted at rest and can only be accessed by a limited set of personnel who will be disclosed to the customer. A limited number of Allovue employees are permitted direct database access for maintenance purposes only. All data communication is encrypted over HTTPS. Allovue conducts regular backups of all customer data that can be restored in case of failure for any reason.

What's your disaster recovery plan?

We take regular, full backups of our databases and test them to ensure we are able to recover from backups. Our application can be redeployed in tens of minutes in any Amazon AWS zone, so getting back up and running is quick and painless for our customers.

How will you protect our student data?

Student data remains anonymized throughout the software so there is never any risk of revealing personal details. Allovue does not hold individual level student data so there is no FERPA risk. Additionally, we do not hold employee data, including social security numbers, addresses or contact information. Our entire system is single tenant so our servers are not shared with any other customers.