



How SUNY Broome Moved from Spreadsheet Silos to Integrated, Insight-Driven Budgeting

State University of New York (SUNY) Broome Community College found itself facing a familiar but increasingly urgent challenge: a budgeting process built on disconnected spreadsheets, manual reporting, and limited real-time visibility. At the same time, like colleges and universities nationwide, the institution faced fluctuating enrollment, rising costs, and unstable funding. SUNY Broome's leaders needed a more agile, transparent, and integrated approach that could transform budgeting from a reactive, time-consuming exercise into a strategic planning function.

In addition to operational inefficiencies, the decentralized budgeting structure created inconsistencies in data interpretation. Departments maintained their own files and applied different assumptions and formatting conventions. Reconciling versions became a recurring burden, and leadership questions about current budget status or projections required manual data extraction and assembly. The process left little time for meaningful analysis and forward-looking planning.

"We really wanted to collaborate in a system that was more efficient," said Larry Allen, Budget and Institutional Effectiveness Officer at SUNY Broome. "Over time, with spreadsheets going back and forth, the information gets lost or copied and pasted incorrectly, and then we were missing things or reporting different numbers on the same exact item. The whole process created a huge reconciliation burden. Before we could analyze the budget, we had to spend days or weeks chasing down the correct numbers."

The need for a more integrated system

Located in upstate New York near the Pennsylvania border, SUNY Broome Community College serves approximately 6,000 students annually, with about 3,700 enrolled in degree programs. As a public community college operating in a dynamic higher education environment, SUNY Broome manages enrollment variability, fiscal constraints, and increasing expectations for accountability. Building greater financial agility was essential.

Before modernizing its approach, SUNY Broome's reliance on spreadsheets meant that budget requests were often submitted in different formats, and approvals moved through email chains or informal conversations. Without a centralized workflow, it was difficult to track where requests stood in the process,



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Enabled more time for meaningful analysis



Drove greater institutional alignment



who had reviewed them, or what assumptions supported them. Reporting, while standardized in final presentation to leadership and the board, required significant manual effort behind the scenes. Each executive summary or financial snapshot involved multiple steps of data extraction, transformation, modeling, formatting, and validation.

"There was really no automated way to track where a request was in the approval chain, who had reviewed it, who modified it, or what assumptions were actually behind why the budget request was what it was," Allen said. "This lack of structure meant we spent too much time managing the process and not enough time managing the actual budget. When we combine all these fragmented spreadsheets, limited visibility, and no unified workflow, we ended up building a process that was slow, reactive and vulnerable to errors."

Enrollment swings made the need for change even more urgent. As revenue projections shifted, the institution needed the ability to model scenarios and respond quickly to new information. The existing system, however, made proactive planning difficult. With all the time spent compiling and reconciling data, the budget office had little time to interpret trends or advise leadership.

Implementing an integrated financial planning platform

Recognizing these challenges, SUNY Broome implemented Strata's Axiom® Suite for Higher Education platform and integrated it directly with its Ellucian

Banner Enterprise Resource Planning (ERP) system. This integration created a centralized environment for budgeting and reporting, with automated nightly data feeds ensuring that financial information remained current. Banner continued to serve as the system of record, while Axiom provided the analytical and planning layer needed to enhance decision-making.

The impact was immediate, Allen said. Manual reporting processes were replaced with standardized, out-of-the-box reports that could be accessed on demand. Instead of navigating a lengthy, multi-step workflow to prepare executive summaries, the budget office could generate up-to-date financial views in just a few steps. Revenues, expenses, and bottom-line positions were readily available, reducing turnaround time for leadership inquiries and strengthening confidence in the data.

Driving cultural change and shared accountability

Perhaps even more significant was the cultural shift that accompanied the technical integration. Department leaders gained direct access to their budget data within a shared system. They now can view assumptions, track requests through approval workflows, and document justifications in a transparent environment. This visibility replaced fragmented communication with structured collaboration and reduced ambiguity around budget decisions.

The move to a unified platform also eliminated many of the blind spots that had limited institutional insight.

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Budget drivers could be clearly identified and monitored, and trends could be tracked as they emerged. With automated integration and consistent reporting structures, trust in the data grew across campus.

"Instead of chasing after updates or waiting for spreadsheets to be emailed around, we gained agility," Allen said. "We can turn around analysis faster, answer questions faster, and adjust our plans much faster than we did previously. The time we used to spend compiling data is now spent interpreting it."

The integration between Axiom and Ellucian Banner played a central role in this transformation. Standardized data mapping and automated feeds created a reliable source of truth, while still allowing flexibility for customization and scenario planning.

Instead of reacting to financial developments after the fact, SUNY Broome leaders can now test assumptions, model risks, and proactively evaluate enrollment impacts. They have more time to analyze performance and support strategic decision-making, as well as a more informed and collaborative financial culture. Key lessons institutional leaders learned from the Axiom integration include:

- **Start with clear priorities:** Focus on automating one high-impact process, such as budgeting, before expanding functionality.
- **Engage stakeholders early:** Gathering input from deans and department leaders helps tailor reporting and improves buy-in and adoption.
- **Leverage standardization:** Out-of-the-box reports accelerate value realization while allowing customization where needed.
- **Trust enables transformation:** Once data integrity is established, institutions can shift focus from reconciliation to strategy.

For SUNY Broome, the transition from spreadsheet-driven budgeting to an integrated, automated platform represents more than a technology upgrade. It reflects a strategic focus on data-informed leadership and greater institutional alignment in a rapidly evolving higher education landscape.

"This shift from having blind spots to having usable insights changes the entire planning conversation," Allen said. "It gets us out of the dark and helps us make decisions based on evidence and not assumptions. It allowed us to transition from reactive budgeting to proactive planning."



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