

# TeamBudget

## Case Study



### City of Hamilton – population 500,000

#### **Municipal Overview**

The City of Hamilton, ON, is located at the head of Lake Ontario in close proximity to both the City of Toronto and the U.S. border.

Amalgamated with the municipalities of Ancaster, Dundas, Flamborough, Glanbrook and Stoney Creek, the City of Hamilton has a population of over 500,000, making it the eighth largest city in Canada.

#### **Business Challenge**

The City of Hamilton used a manual process for budget preparation and submission. Using Excel and PeopleSoft, the process was long, required a lot of manual data-entry and verification, and placed a considerable drain on network drives and electronic storage space.

The process began with staff rolling over the existing data to the new year. Any year-specific information would then need to be manually updated in each of the 1,100 project detail sheets.

The Capital budget book, close to 500 pages in length, contains data found in numerous files, from several different sources. Each section was printed separately and then combined into one document. All pages needed to then be numbered by hand, and a lengthy manual check was required, to ensure accuracy of information.

Specific information reports were often requested by Management and Council during the review phase. These were difficult to provide using the limiting report templates that existed.

Once the Capital budget received approval from Council, it was then loaded manually into PeopleSoft, on a per-project basis using an excel spreadsheet. This process would typically take three days.

High stress levels within the staff remained a problem throughout the entire budget process, due in large part to the struggle to meet deadlines, and the quick turn around expected on information requests.

#### **Solution**

The City of Hamilton was aware of the need to improve its operating budgeting process, and after meeting with Questica at a conference, Hamilton selected Questica's TeamBudget Capital budgeting solution to answer their specific needs and requirements.

#### **Case Study Overview:**

##### **Municipal Overview:**

The City of Hamilton, ON, population 500,000, is located in close proximity to both Toronto and the U.S. border.

##### **Business Challenge:**

The City of Hamilton needed a budgeting system that was centralized, easily accessible, and that would reduce the hours involved in the budgeting process.

##### **Solution:**

Questica's TeamBudget Capital web-based solution provided the City of Hamilton with a centralized point of entry and data storage, while ensuring information accuracy across all departments

##### **Business Benefits:**

The City of Hamilton has :

- Over 200 hours saved
- Precise Financial Modeling
- Faster Information Turnaround
- Reduction in errors

##### **For More Information:**

Further information on the TeamBudget Capital can be obtained at [www.teambudget.com](http://www.teambudget.com)

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### **Business Benefits**

The City of Hamilton has completed two budget cycles using Questica's TeamBudget Capital and has enjoyed numerous benefits to their new process, including:

#### **200+ Overtime Hours Saved**

Using TeamBudget Capital's centralized database, the City of Hamilton has reduced its budget preparation time by over 200 hours. New budgets are automatically rolled forward, capturing all relevant information. Changes made to budgets at any stage of the budget cycle are updated system wide. Centralized data ensures consistent information throughout the organization.

#### **Precise Financial Modeling**

The City of Hamilton is able to conduct precise financial modeling. TeamBudget Capital's real-time application ensures that all information is up to date, and that no last minute changes are missing.

#### **Faster Information Turnaround**

Council-ready reports and last minute information requests are now available in minutes, not hours. This has not only reduced the time required in bringing the budget to council, but also the level of stress felt by everyone involved in the budgeting process.

In addition, many of the tasks required of a capital budget system are now available quickly and easily, such as ranking projects, indicating operating budget impacts, tagging related projects, and embedding maps.

#### **Reduction in Errors**

TeamBudget Capital has significantly reduced the probability of error during the flurry of last minute changes by departments just prior to the budget going to print. Changes are automatically updated system wide, ensuring all reports contain the most current, and accurate information.

**TeamBudget Capital allows us to spend more time on Capital Budgeting and Financing Analysis and spend less time linking spreadsheets and reviewing data for clerical errors.**

**John Dibattista,  
Senior Financial  
Analyst,  
City of Hamilton**

### **For More Information**

TeamBudget Capital is a secure web-based solution structured on a proven capital budgeting model. Working in conjunction with the public sector, TeamBudget Capital was designed to solve the cumbersome process of assembling, tracking, analyzing and reporting of capital budgets.

Further information on the TeamBudget Capital product can be obtained at [www.teambudget.com](http://www.teambudget.com)