

# TeamBudget

## Case Study



### City of Murrieta – population 97,000

#### **Municipal Overview**

Murrieta is a city in southwestern Riverside County, California. With a population of 97,000+, it is one of the fastest growing cities in the state. Largely residential in character, many of Murrieta's citizens commute daily to jobs in San Diego and Orange counties.

#### **Business Challenge**

The City of Murrieta's Operating Budget process was Excel based, with numerous worksheets, all linked to a summary spreadsheet. A team of between 2-5 people worked on the preparation of the budget.

The budget cycle began with the Operating Budget team providing worksheets to each department, detailing their prior year budget and current year-to-date actual expenses. Instructions were given as to what was allowable and what was not, and request forms were also provided.

The Finance Director and City Manager met with the individual departments to fine-tune the actual items to be added to the budget. The Community Steering Committee then held several public meetings to review the budgets and garner community feedback. Based on this feedback, the committee made recommendations to the Council, and a Budget Workshop was held each May with the City Council. They gave their direction on the budget, adjustments were made, and a final version was then presented for adoption, in June, at a Council Meeting.

Following adoption, additional reports and narrative details were worked on, culminating in the release of a printed budget document in August/September.

The challenge with the City of Murrieta's budget process lay in ensuring that all changes made at both the detailed and summary worksheet level were updated on all affected worksheets. Often links would be deleted or hard coded in error, and files would become corrupt. New lines added in the detail section of the worksheet were not always added to the summary level. This made reconciliation between reports extremely tedious, as any change to the budget had a domino effect and required enormous amounts of time to revise each worksheet.

#### **Solution**

Interested in finding a similar product that would provide the same benefits to the Operating Budget team, the City of Murrieta realized that TeamBudget Operating was a perfect fit for their operating needs, and purchased the solution as soon as it became available.

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

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

The City of Murrieta, CA, population 97,000+, is one of the fastest growing communities in the state.

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

The City of Murrieta was looking for an Operating Budget solution that would simplify the process, combine all information in one place, and provide reports at the "push of a button".

##### **Solution:**

Questica's TeamBudget Operating greatly reduced the turnaround time required for the preparation of the City of Murrieta's Operating Budget.

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

Benefits to the City of Murrieta include :

- Two months saved in budget cycle
- Push button reports
- More confidence through centralized information

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

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

# TeamBudget

## Case Study



### **Business Benefits**

TeamBudget Operating was developed to address many common pain points faced by municipalities during the budget cycle. For the City of Murrieta, several key features they have benefited from include:

#### **Two Months Saved in budget cycle**

TeamBudget Operating has greatly reduced the turn-around time required for the completion of the final budget document. Narrative details and additional reports are so easily accessible that the final document can be completed two months earlier than before.

#### **More Confidence through Centralized Information**

TeamBudget Operating eliminates the need for numerous spreadsheets, as previously required. By providing one centralized access point for all information, updates and changes now take affect system wide. This ensures the information received by everyone at each stage of the process, is accurate and current. Decisions can be made more quickly and with confidence.

#### **Push Button Reports**

Being able to provide reports at the push of a button allows the Operating Budget team to respond to requests with ease and assurance. The ability to create additional custom reports provides flexibility to how the information is presented to each different audience.

**The staff at Questica are wonderful people to work with. They have demonstrated a willingness to go above and beyond to make the customer satisfied with the finished product.**

Teri Cardoza, Budget Analyst  
City of Murrieta

**TeamBudget Operating has greatly enhanced our budgeting cycle; the workload is reduced, the reports are reconciled, and it is one of the easiest software products I have ever used. It is flexible and input errors are easily corrected.**

**Teri Cardoza  
Budget Analyst,  
City of Murrieta**

### **For More Information**

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

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