

TeamBudget

Case Study



Shelby County, TN - population 909,035

“We are very satisfied with the TeamBudget database and reporting solutions achieved to date and look forward to fully utilizing other features as we continue our implementation.”

*Audrey Stevenson-Tipton, CPA
Controller - Finance, Shelby County*

Overview:

Population: 909,035
Financial System: MS Govern
TeamBudget Suite

The County of Shelby is the largest County in the State of Tennessee.

Business Challenge

Shelby County needed a budgeting solution that was easy to use and more flexible than their existing system.

Solution

TeamBudget provides Shelby County with a simplified, user-friendly and fast method of budget preparation.

Business Benefits

- Flexible Reporting Capabilities
- Quick Turnaround on Budget Book Preparation
- User Friendly
- Multi-source Report Data

For More Information:

Further information on the TeamBudget Suite of products can be obtained at www.teambudget.com

Municipal Overview

Shelby County is the largest county in Tennessee, both in terms of population and geography. Located in the Southwest corner of the state, Shelby's county seat is Memphis.

Business Challenge

Shelby County's budget process starts in late fall, and culminates with Commission approval in June.

The County had been using the same budget process for many years and users were quite comfortable with it. However, it brought many challenges, including extensive data entry, ensuring accuracy of that data, a report system that was inflexible and complex, and difficulty in combining data with narrative text for program budgets.

A variety of Microsoft formats were used during all stages of budget preparation, including Microsoft's Access, Excel, Publisher, and Word.

The database system was a critical component of the budgeting process. However, given its complexity and inflexibility, not many resources were familiar enough with it to make changes to the existing format. It was difficult to manipulate data to build scenarios or change modifiers, which resulted in a heavy reliance on the 1-2 resources with in-depth knowledge of the system.

Reporting proved to be another challenge. Navigating the many existing queries and reports could be a source of confusion to users, while creating new reports presented issues in terms of time and design skills.

One of the biggest challenges in preparing the budget document is consolidating all information in as efficient a method as possible. A program budget is required for every single budget unit, including financial data and narrative text. Since no suitable product was available in their current library, Shelby County created the necessary documents by using a merge process in Word; however, this was a very cumbersome procedure that was not conducive to frequent changes.

Due to County protocol, the finance department was required to prepare the budget book twice—once in preparation for presentation to the County Commission, and again once the final budget had been approved. This proved quite a drain on resources, and required a tight turnaround.

Solution

A new budgeting solution had been on the County's mind for some time, but due to budget limitations, they weren't sourcing anything.

Based on a recommendation by MS Govern, they agreed to a demonstration of the TeamBudget Suite, and were pleased to learn that TeamBudget could resolve many of their budgeting challenges and would integrate easily with their financial system and other software.

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Business Benefits

Shelby County was anxious to begin benefiting from TeamBudget as quickly as possible. Since their schedule didn't enable a complete integration upon purchase, the decision was made to handle the implementation in two phases. The first phase, which is complete, involved setting up the database and preparing the Budget Book for the current budget season.

Phase Two is scheduled to begin in January 2010, and the County is looking forward to realizing further benefits such as greater controls over position based budgeting, multi-year budgeting, modeling scenarios for different expenditure levels, and security controls over budgets through all stages of the budget.

Flexible Reporting Capabilities

TeamBudget provides robust report capabilities, enabling the County the flexibility they require.

In addition to over 80 standard reports, custom reports are simple to create. The structure of the reports themselves are such that a report can be designed and then run in any number of different ways, to produce the specific changes required, based on fund, section, level of organization, etc. By providing this flexibility, a variety of people can now be involved in the preparation and running of reports for the budget books.

Quick Turnaround on Budget Book Preparation

TeamBudget simplifies the process of preparing budget books. Now, not only can more people be involved in the process, but the time required to change reports is reduced significantly.

This frees up time for the finance department to focus on other job duties such as reviewing the financial data rather than producing it.

User Friendly

TeamBudget is designed to mimic the structure of many familiar software applications. It is intuitive and makes the time required to understand and use the system much shorter. This reduces the dependency on a few key personnel and decentralizes the budget process.

Multi-source Report Data

TeamBudget reports are designed to combine data from different sources. Program Budgets can be run for every single budget unit, combined on one page, capturing financial data along with associated narrative text such as service level measurement, scenario, historical and current budget information.

“ The customer service provided by the TeamBudget staff has been excellent - always very professional and pro-active in adapting their product to our needs. ”

*Wanda Richards
Operating Budget Manager, Shelby County*

For More Information

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

Further information on the TeamBudget Suite of products can be obtained at www.teambudget.com