

# TeamBudget

## Case Study



Southampton, NY - population 55,000

### Municipal Overview

Located approximately eighty miles from New York City on the South Fork of Long Island, the Town of Southampton is one of Suffolk County's ten townships.

Southampton encompasses six incorporated villages within its boundaries, each with its own village administration: Sag Harbor, North Haven, Quogue, Westhampton Beach, West Hampton Dunes, and Southampton Village.

### Business Challenge

Like most municipalities, the Town of Southampton has a very manual process in place for creating and submitting capital budgets to Council. For the Town of Southampton, the process starts in June and ends in November when the budget is adopted. Budget templates are first sent to department heads to complete and submit to the Comptroller, who prepares the requested budget and submits it to the Town Supervisor, who then schedules budget meetings with each department head. The Town Supervisor makes the necessary adjustments and submits his tentative budget to the Town Board. Public hearings are then scheduled to go over the proposed budget and necessary changes are made before the adoption meeting at which time the budget is accepted.

The Town of Southampton had a desperate need to streamline the process. They were looking for a solution that would provide real-time data, notification of changes and minimize errors by tracking the changes made to the budgets. Southampton was hoping that the solution would be successful in making all departments accountable for their submissions.

### Solution

Southampton's need for a simpler process led them to engage the Gartner Group in a lengthy process of finding the right software solution to automate their budgeting process. After a six-month competitive search, Southampton, with Gartner Consulting's recommendation, chose Questica's TeamBudget Capital as the right solution for them.

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#### Solution:

For the Town of Southampton, TeamBudget Capital provided its staff with the ability to submit, review, approve and maintain all of their capital budgets.

#### Business Benefits:

Charlene Kagel states that "TeamBudget Capital fulfilled the needs of Southampton by automating a once manual process." The software provides a simple to use workflow system allowing users to promote and demote capital projects.

#### 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 benefits of TeamBudget Capital are numerous. For the Town of Southampton, the key benefits were:

#### Streamlining the Capital Budgeting Process

From one stage to the next, TeamBudget Capital simplified the submission of capital project requests by providing users with the ability to:

- Create multiple "What-if" scenarios in an easy to use wizard interface
- Build multi year projects to quickly modify new budget year expenditures and funding changes
- Use "User-defined e-mail alert" functionality to better manage projects
- Develop "Council Ready" reports using existing reports or customize your own

#### Time Saver

The Town of Southampton has been very pleased with the usability and effectiveness of Questica's TeamBudget Capital. Considering there are a number of departments involved in the process, this is a significant increase in hours (40-50) saved. No duplicate entries lead to fewer errors and less time spent finding and correcting mistakes.

**This solution has saved departments approximately 40-50 hours per budget cycle...**

#### Accountability of Staff

Using the "What If" analysis, departments are able to create several budget versions before submitting their final version to the next level. Once the final budget is released, its changes are tracked and the initial creator of the budget is notified. Individuals can customize alerts so that they are notified accordingly. Having this type of control over the budget ensures that all individuals and departments are made accountable for their submissions.

#### Integration with Financial Package

TeamBudget Capital was designed to integrate with almost any financial package. For Southampton this was key as it meant that they did not have to invest additional dollars in switching to another financial package. "We have been so pleased with the implementation of TeamBudget Capital that we would highly recommend it to other municipalities," states Ms. Kagel.

#### 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)