

# Public Sector Budgeting



Meridian's Budgeting and Planning Practice offers a powerful end-to-end public sector solution that supports many budgeting approaches, processes and outputs.

Meridian Partners has almost two decades of experience customizing and implementing Budgeting and Planning solutions for public sector school districts, state, and municipal government organizations.

We provide an automated solution that ensures successful stewardship of a wide range of Budget & Planning requirements.

Together, we can create a manageable Budget & Planning Process supported by Intelligent Automation

  
workday.

Services  
Partner

# Public Sector Budgeting



**Meridian's budgeting framework is a flexible, easy-to-use and proven solution that:**

- Ensures current and future priorities are timely and accurately represented in the right budget structure
- Allows for the seamless integration of critical management processes:
  - Planning and budgeting
  - Procurement
  - Cash and expenditure management
  - Asset management
  - Reporting and oversight

**Meridian has extensive experience assisting public sector organizations to ensure the integrity and compliance of:**

- Fiscal system, processes, and procedures
- Accountability and transparency
- Financial statements





## Why Organizations Call Meridian



### Ideal Client Profile

- Organizations that do not have the expertise or staff with the latest business technology background to support budgeting and planning.
- Budget operations are spread across too many automated, spreadsheets, or manual systems. Organizations desire a single application to manage all budgets and budget types (e.g., operating, capital, grants).
- The need for seamless integration with ERP and non-ERP systems (e.g., accounting, contracts, and procurement).
- The organization is complex and requires easy-to-use and flexible tailoring of budget forms, process controls, reports and analytics to adapt to changing requirements.
- Budgeting teams need better options in preparing budget publications; lower cost and shorter timeline than current Budget Book publishing methods.
- Real time process visibility



### Get It Right the First Time

- Proven methodology and implementation agility to meet critical timelines and requirements
- Experts at public sector budgeting and budgeting systems
- Certainty without missed dates, surprises or overruns

### Key Business Benefits



**Highly experienced Consultants that ramp quickly and get quick results.**

**Expert management of Budget & Planning applications management, upgrades, implementations, maintenance and support.**

**A proprietary budgeting framework and experienced business consultants who understand:**

- Multi-year budgeting
- Staff planning; position, salary and benefit planning
- Critical analytics and dashboards required for modeling and ad-hoc analytics
  - Workflows and integrations
  - Planning and budgeting
  - Procurement, cash and expenditure
  - Asset management
  - Reporting, oversight and auditing requirements

# How We Win Together



Financial Savings

Transparency & Automated Processes

Streamlined Audit & Reporting Capabilities

Scalability of Controls, and Data Protection

Increasing business complexity and growing public and regulatory scrutiny has created the need to pull together budget information into a single transparent strategy.

## Client Examples

As one of largest school districts in the United States, Miami Dade County Public Schools (MDCPS) operates like a large complex business in order to meet its commitment to excellence in education.

**Situation:** MDCPS leaders devoted a vast amount of time and energy to matters related to budget development, procurement, audits, risk management, and financial compliance. Maintaining budgeting models to meet increasing demands, conflicting priorities and evolving compliance and reporting requirements required a modern, comprehensive information system. They needed to replace the current legacy budgeting tool, as it was difficult to modify and update, and it was near the end of support.

**What We Provided:** A series of workshops with the MDCPS's finance and budgeting team were conducted to prepare for K12 Budgeting Solution deployment. The K12 Budgeting Solution was designed, built, tested and successfully put into production. Onboarding workshops and a dedicated support team ensured the smooth transition to the new system for the 600 end-users.



The Commonwealth of Pennsylvania (COPA) is the 9th most densely populated state with the 6th largest budget, approximately \$78B total annual budget and ~12 agencies with different accounting and financial systems.

**Situation:** The pandemic highlighted the difficulties with many state governments' legacy IT systems, which are still used to manage critical systems such as the distribution of unemployment insurance and budgeting systems. For the Commonwealth of Pennsylvania (COPA), their legacy budgeting system was aging rapidly, making it was difficult and costly to modify, update and maintain.

**What We Provided:** COPA selected Meridian to implement the modern budgeting solution. Meridian designed, built and configured a new budgeting application, data models and calculations using a rapid prototyping approach, retaining the core functionality of required reports and data input screens, but with new, intuitive and user-friendly look and feel.

