

TeamBudget

Update #2



November 14th, 2012

What's Going On?

It has been a busy few months working on budget system implementation. The Core Team has been working intensely – both internally and with Questica – on configuring, refining and testing TeamBudget, as well as uploading complex information into the system. We conducted a mock budget exercise with Business Advisory Team members in October, and a similar exercise with Technical Team members in early November. Both exercises allowed us to demonstrate key features of TeamBudget and gather departmental feedback.

With December fast approaching, it became clear that we were at a crucial decision point as to whether we could successfully implement TeamBudget for the FY 2014 Budget cycle. While the desire for a new budget system has been many years in the making, it was a little over a year ago that we began the process to solicit bids for a new system. Our original timeline assumed finalizing a contract in December of 2011 and kicking off the project in January 2012. Unforeseen process delays pushed the kickoff back to July 2012, significantly compressing the schedule. This gave us less than four months to complete what we had anticipated to be a year-long project.

While we have made significant progress in configuring and testing TeamBudget, it has become clear that it would be best to take more time before deploying the new system. This means that we will not use TeamBudget for the development of the FY 2014 annual budget. Instead, we will continue our work on the new system with the dual goals of ensuring TeamBudget's readiness for the FY 2015 annual budget cycle and making the new system available for training and trial use in advance of the FY 2015 cycle.

This decision was not made lightly. We sought the input of our stakeholders throughout the process – during the mock budget exercises, at team meetings, and through individual conversations. We also developed detailed “go/no go” criteria to assist in the decision of whether we could successfully implement TeamBudget for FY 2014.

Where Does This Leave Us?

The decision to hold off on implementation of TeamBudget means that we will fall back on our existing budget tools for the FY 2014 cycle. We are confident that we can make our current system work for one more year, and we strongly believe that the additional time will ensure a more seamless transition to TeamBudget. The Budget Office's immediate focus will be on readying the current system and materials, culminating in our mid-December release of information that departments need to build their FY 2014 budgets. Once we have passed that milestone, we will refocus our efforts on TeamBudget, revising our project plan to determine the best path towards readiness for the FY 2015 cycle and accessibility to the new system in advance of that cycle. Throughout this process, we will continue to involve the departments and give careful consideration to their feedback.

A Note of Appreciation

It is important to acknowledge that the major progress we've made in developing TeamBudget to date would not have been possible without the tremendous level of effort by many people over the past few months. We are especially appreciative of the efforts of the Core Team, Business Advisory Team, Technical Team, and Executive Steering Committee, all of whom have dedicated countless hours to this effort. They have ensured that TeamBudget is well on its way to successful implementation and that we were able to make a well-informed choice. While it is never an easy decision to delay an exciting new project, it is a testament to this organization's flexibility that we could take a step back from the implementation process to make the best decision for our FY 2014 budget cycle.