StopWaste (Oakland, CA)
Case Study

> "We spent more time in the sales process than some other customers may have because we had to build support internally. We invested in a custom demo so we could show people internally how Questica Budget could meet our needs."
>
> **— Meghan Starkey, Senior Management Analyst, StopWaste**

About StopWaste

StopWaste is a public agency in Oakland, California, dedicated to reducing waste in Alameda County. Through recycling programs, waste prevention initiatives and education, StopWaste helps businesses, residents, and schools waste less, recycle properly, and use water, energy, and other resources efficiently.

Business Challenge

StopWaste was using several different systems to prepare their budgets, including their financial system, a custom database and multiple spreadsheets. Budgeting with their Munis financial system proved to be difficult due to unique StopWaste requirements, and the barriers for non-financial staff to navigate the system. The custom database helped 20 non-financial staff enter budget data, while spreadsheets filled in the gaps for analysis. StopWaste was concerned about the potential for errors in the budget, since multiple systems needed to be reconciled. In addition, they were interested in increasing collaboration and connecting the flows of information to get new budget insights.

Solution

When StopWaste's custom database could no longer be supported, they looked for a solution that could handle flexibly assigned funding sources, as well as allocations by project and hours. Also important was a solution that could not only handle policy requirements by revenue source and minimize risk of errors, but also be robust and user-friendly. Using a custom demo, StopWaste tested Questica Budget to see if it was a good fit for their organization. They demonstrated to staff how the system would meet their budgeting requirements, such as managing their multiple funding sources and understanding if their core expenditures target would be met. After completing one budgeting cycle, StopWaste plans to investigate incorporating their actuals into Questica Budget, and to take advantage of the change request feature for amendments to approved budgets.

Financial System

Munis

Annual Operating Budget

$30 million budget distributed to programs and grants; $10.5 million core budget

Products

Questica Budget's Operating and Salaries

Business Need

StopWaste needed a more efficient budgeting process to reduce errors and foster better collaboration with non-financial staff.

Organizational Benefits

- A streamlined budgeting process to improve efficiency and accuracy
- User-friendly, easy to navigate system for financial and non-financial staff
- Able to manage funding sources by allocating funds by project or hours
- Better budget insights for faster decision making

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Business Benefits

Streamlined budgeting process to improve efficiency and accuracy

Questica Budget allows StopWaste to put aside their disparate budgeting tools and eliminate the need to reconcile data in different locations. Questica Budget's powerful system integrates with their Munis financial system for a streamlined, efficient budgeting process. With all of their data in once place, StopWaste has the ability to prepare their budgets and assemble actionable data from anywhere in the system for reporting and analysis. StopWaste can work on the budget and be confident that their budget data is up-to-date and accurate.

User-friendly, easy to navigate system for financial and non-financial staff

Successful budgeting requires the participation of non-financial staff in the budgeting process. Questica Budget offers visually appealing and easy to navigate dashboards that can be customized to show non-financial staff their own budget data and keep them engaged in the budgeting process. The system provides StopWaste early in the budgeting process consistent visibility into project costs by staff and the ability to dig down into the General Ledger (GL) accounts structure to individual cost centers and multiple funding sources.

Able to manage funding sources by allocating funds by project or hours

An important aspect of StopWaste's budget is distributing funding sources that are mixed and matched in varying percentages based on current activities, external funding sources, and board priorities. Depending on whether a project is funded by core revenue or not, any changes to the way overhead is distributed or hours are budgeted can have an impact on their core revenue target and affect other projects.

Questica Budget has provided StopWaste with the ability to not only allocate staff and other resources by project, but also allocate by hours, and ensure the organization is meeting their core revenue target.

Better budget insights for faster decision making

Public sector organizations need to quickly make decisions and adapt to changes in funding or program needs. If they choose to budget with workarounds or disparate systems, they could find themselves struggling to keep up. With all of their budget data in one place, Questica Budget creates a single source of data truth that StopWaste can use to make data-driven decisions to achieve their objectives. By improving their budgeting process for greater efficiency and accuracy, StopWaste can move away from their previous inefficient budgeting system, and focus on gaining insights from their budget and planning for the future.

"I got a lot of really positive feedback during the training process. We did our own training and spent a lot of time helping people become comfortable with the system. We also spent the time to build out the custom reports. Having the reports people needed was critical because you want everybody to be self-sufficient in getting what they need out of the system," said Starkey.

By using Questica Budget, StopWaste is streamlining their budgeting process and is now working smarter to achieve budgeting success.

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