Budget Developer

for schools

enhanced visibility   greater control   less time

Tools for effective budget development

> As a Superintendent, this system has supported improvements to our budgeting process and helped us develop a balanced budget year after year. It is designed specifically for school district budgeting.

> As a Principal, I have access to all the critical information about my budget and staff. The ability to clearly see all my site controlled funds is great.

> As a Budget Director I can see the aggregated budget for my entire district and easily drill down into an individual site for specifics.

Solution
↓
Budget Developer

> As a HR Director, the information on credentials, seniority, subjects taught is great. The system even validates courses staff is authorized to teach.

Budget Developer for Schools - is budget development software that brings your financial/HR/enrollment data together in a way that supports an efficient, data driven budget process for school sites or departments.

- **Well designed** wizard provides a clear view into a sites' budget, allocations, enrollment, projected expenditures, vacancies, positions, credentials and all relevant budget data.

- **Flexible structure** enables a District to use the system to address a variety of budgeting processes including   LCFF and LCAP.

- **Secure** web access with a consistent user interface supports implementation with a variety of budget and computer skill levels

- **Data quality** is improved through integration with existing financial and HR systems and automated budget code and staffing validations that are part of the system.

- **Robust reporting** structure enables district and school site staff access to appropriate data supporting effective collaboration.

- **Personalized view** provides District administrators with the ability to view individual site budgets, combined budget of a group of schools or the entire district budget.

- **Scenario and Version Controls** support strategic planning and modelling by District staff. Enables staff to create versions where they can incorporate different budget variables

Quality data you can rely on to make critical decisions

Key benefits for principals:

- Clear unified view of all site budget components
- Consistent web interface is easy to use resulting in minimal training time
- Previous year budgets and staffing are displayed on screen and in reports
- All current personnel data are displayed to support staffing recommendations
- Staff credentials are validated to courses authorized to teach for projected year
- Validation report identifies budgeting errors to correct prior to submission
- Travel time reduced with ability to work on line with budget staff or supervisor
- Approval process can be viewed on line to track progress
- "One click" reports provide all critical data, advanced filters support custom reports
- Ability to access previous year budgets in one secure location

Pro Budgeting

Budget Developer
for schools

Allocation	$451,258.00
District Contribution	$8,879,085.96
Total Allocation	$9,330,343.96
Site Labor Expenditures	$6,212,342.47
Site Non-Labor Expenditures	$523,844.40
Total Benefits	$2,594,156.91
Site's Total Expenditures	$9,330,344.01
Surplus/Deficit	-$0.05
Certificated Salaries	
Smith, Evans (A-PER)	2000 $74,403.00 √ 1.0000

Budget & Finance Dept.

Human Resources/Position Control

Site Accountants

Department Managers

School Principals
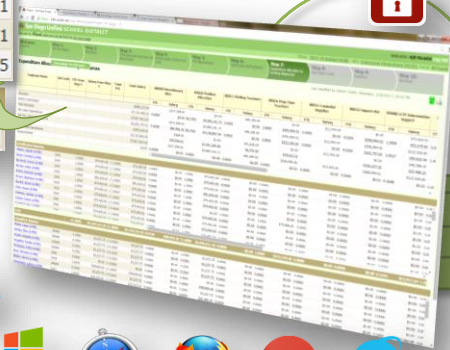
Centralized & Integrated Database
- ✓ Budgeting for FTE's
- ✓ Budgeting for non-salary expenditures
- ✓ Validation against Chart of Accounts
- ✓ Unrestricted/Restricted Allocations
- ✓ Enrollment History & Projection
- ✓ Certificated & Classified Positions Rules
- ✓ Vacancies & New Hires Accounting
- ✓ Credentials & Seniority Data Profiling
- ✓ Validates Credentials to Course Subjects
- ✓ Robust workflow and approvals routing
- ✓ Comprehensive Reporting
- ✓ Seamless integration with Financial & Position Control Systems
- ✓ Flexible import/Export capabilities to various formats

Bi-directional integration with Financial & HR your systems

✓ *Unified platform for all budget related data, process, guidance and communication*

✓ *Validated, accurate, data driven budgeting*

✓ *Centralized and/or distributed implementation*

✓ *Ability to link to organizational goals*

How does it work?
• Budget Developer enables education organizations with multiple school sites and departments to manage the budgeting process through an easy to use web interface while improving controls and data quality with a centralized database structure.

•All datasets are loaded through an administrative interface. The system can accommodate a wide variety of allocation models.

•Principals and budget managers log in and go through a guided step-by-step process to build a budget recommendation.

•District staff can monitor the progress at any point in the process to identify those in need of support. Reporting is robust, enabling district staff to view individual sites or roll up data for the entire organization.

•Finance staff can filter by budget string while HR staff can analyze projected staffing and proactively identify issues with credentials or seniority.

Why administrators love it

Key benefits for Budgeting Department:
•Improved control over entire budgeting process

•Ability to load allocations per site based on site type, enrollment, student demographics etc.

•Use actual or average salaries for budgeting

•Budget allocated to sites can be restricted to select job types and resources

•Ability to import completed budget directly into your financial system as adopted budget

•Validates against your Chart of Accounts

•Provide real time assistance to Principals / Budget Managers as they work on their Budget

•Ability to do batch updates to budget data

•Detailed audit log tracking date/time stamp of changes made by any user on any site

Pro Budgeting

CONNECTED: A SYSTEM THAT IS INTEGRATED AND COLLABORATIVE

Unified View—consolidated view of all budget data contoured to the needs of every user, empowering decisions through effective and insightful interfaces.

Connected—integration with financial/accounting/SIS systems enables your organization to automate processes and realize higher efficiencies.

Quality—checks/validations against data from your core systems provides a higher quality of information and minimal corrections.

Open—ability to get data in and out of Budget Developer allows you to use your own data in unimaginable ways. Budget Developer exports rich datasets for advanced analysis using your favorite tools.

Workflow—designed for school districts, this intelligently crafted workflow allows budget approvals to be routed through customizable validation/approval process. Approval submissions checks for errors, providing a downloadable corrections list.

Communication—email notifications, check-off flags, ability to add notes/comments, and attach documents ensures that this system can capture every detail about a site's budget data and objectives. An in-depth audit log provides critical details on every change.

Simple—well thought out and intuitive interfaces allow all staff with all levels of technological skills to start using Budget Developer within minimal training. A familiar step-by-step wizard process guides principals and administrators through a logical navigation process.

Budget Developer brings together comprehensive position and employee data from your existing HR system, essential for making position budgeting decisions. Specific data regarding projected student distributions at sites, position allocations and funding, listing of staff by job types/ positions, rolled over projected FTE, staff's credential information with subjects and validity, eligibility status, all tied to District's HR/Position module provide decision makers with complete picture throughout the budget development process.

"This budgeting tool resulted in a leap forward in our budgeting process with all key fiscal and HR data easily accessed by principals and budget managers. We had used excel workbooks for years and had issues with version control and it took large amounts of time to aggregate the data. Budget Developer provides easy management, uploading into our financial system, and reporting so we can focus more time on working with sites to develop more effective budgets"

Cristen Owens
Director, Budget Development
San Diego Unified
School District

"Proxient understands the needs of K-12 education and provides products that are practical and make sense for both district and school site staff. The support and service they provide is second to none."

Marty Fuentes, Controller
Sequoia Union High School District

WHY SHOULD I CHOOSE BUDGET DEVELOPER?

Feature	Budget Developer
Web based ASP system	✓
Centralized Database, no more multiple budget files floating back and forth	✓
Integrated Authentication so staff use existing user ID and passwords	✓
Designed to integrate directly with Financial/HR systems	✓
Customizable validation against chart of accounts and administrative settings	✓
E-mail notification for actions taken	✓
Advanced customizable workflows	✓
Short implementation timeline	✓
Clear & simple pricing	✓

GET STARTED TODAY

Try Budget Developer today:
http://proxient.com/budget-developer

Call or email for a short demo:
Phone: (707) 747-1230   Email: info@proxient.com

Why administrators love it

Key benefits for HR Department:

•Current staffing is conveniently displayed and drill downs include information on credentials, seniority, and courses authorized to teach is available on screen and in reports to support effective personnel decisions.

•HR staff can log in to see the same view as Principals and provide support/guidance in real time.

•System validates credentials against proposed subjects taught to give HR staff valuable forward looking data on issues with proposed positions.

• Reports designed specifically by former school district HR staff provide all essential data to support planning. Advanced reporting provides custom reports.

Reporting

•A robust reporting module with comprehensive search filters provides all users with appropriate and useful reporting.

•At the site or department level, reports summarize all critical budget data. At the district level, staff can report on all aspects of budget data, correlated against site goals, allocations, enrollment, staffing, expenditures, budget codes etc.

•A cross-set of filters allows users to create custom budget reports and an ability to export key data files in required format, automating the import into existing financial systems.

Check out what else we offer:
http://www.proxient.com/

Pro Budgeting