



Modernizing
Public Sector Finance
for Enhanced Efficiency
and Accountability



Deep Dive: Humble ISD

The Challenge

In the public sector, effective budget management is paramount for ensuring responsible resource allocation and optimal service delivery. However, numerous challenges often hinder this process, ranging from limited visibility into historical data to the absence of real-time insights. In this whitepaper, we delve into challenges faced by Humble ISD in their budgeting and reporting process.

By understanding these challenges and their implications, we aim to highlight the solutions offered and pressing need for finance transformative solutions in improving the budget management practices and reporting in the public sector.



The Plan

Humble ISD is a school district with 49,000 students and 48 campuses that has an annual operating budget of \$500M+. The annual budget process included 100+ budget managers submitting their requisitions via a Google form without any visibility to historical budgets or actuals. Not only did this impact effective financial planning and resource utilization, the lack of access to historical data compromised budget planning accuracy. Billy Beattie, CFO of Humble ISD found Whitley Penn 's CAAS DATS group through the firm's September Public Sector Webinar and was prompted by the curiosity of more transparent data management for not just finance but also his budget managers. In addition to lack the of data transparency, the key challenges faced by Humble ISD was tracking the status of budget submissions and manual aggregation of budget dollars across all the campuses and departments. The absence of a tracking mechanism to monitor submissions increased the risk of delays and inefficiencies in the budgeting process. Manual data aggregations are labor intensive and error prone diverting focus from strategic initiatives and hindering organizational efficiency.

The Solution

To address these challenges without overwhelming the budget manager with the new technology, it was important to transition from Google forms to purpose built technology.

Here is how the new solution in Planful worked:

Streamlined Data Entry: Designed a customized input form with a view of historical budget and actuals that empowered budget managers to make informed decisions before making/approving budgets.

Automated Tracking: Created workflows to track budget submission process removing the burden of having to do constant follow-up to monitor the status of the budget process.

Integrated Data Tracking: By integrating with existing data sources, such as Munis (ERP), the burden of manually aggregating data, redoing the reports for any change to budgets or actuals is eliminated making the transition seamless.

Transparent Budget Visibility: Budget Managers now have a clear visibility into historical data and real-time insights through dashboards or reporting features that display past budgets and current expenditures.



Billy Beattie and team took charge of training budget managers, who come from non-finance backgrounds, on how to submit budgets and track status through the workflow process. This approach ensures that the budget managers can effectively engage with the new system despite their lack of prior finance experience. By focusing on educating the budget managers and making them comfortable with the platform, the team successfully bridged the knowledge gap and improved user adoption. Planful is meant for finance team to steer the budgeting journey without the need for reliance on IT.

“I felt like a caveman discovering fire for the first time! It was quite amazing asking for the world and realizing it is within our grasps. The turning point was knowing that there was a team who’d already done it for others before and that we could also have both a robust process but be supported by scalable technology”

- Billy Beattie, CFO of Humble ISD

The Outcome

In conclusion, the transformation of Humble ISD’s budget management process demonstrates the substantial benefits of finance-led solutions in the public sector. As other public sector organizations face similar challenges, Humble ISD’s experience serves as a compelling example of how purposeful technology and finance-led initiatives can revolutionize budget management and reporting practices.