

*“ClearGov Budgets has been very well received by our Finance Committee. During budget season, we use it to easily and efficiently communicate important financial information to both internal and external stakeholders leading to more productive and efficient public hearings. ClearGov Budgets saves our administration and committee members significant time!”*



**Sean O'Brien**  
Special Assistant to the Finance Director

## PRIMARY OBJECTIVE:

**Make the budgeting process more transparent, collaborative, efficient, and accurate**

### CHALLENGE:

The budget process is one of the most important tasks that Natick faces annually. Prioritizing what gets distributed where affects everyone within the community, so it's especially important to keep the process open and collaborative.

Sean O'Brien, special assistant to the finance director, plays a key role in producing and monitoring the annual budget, coordinating with internal department heads to capture everyone's input and kick out the numbers they need in a timely manner.

Prior to purchasing ClearGov, O'Brien spent a ton of time chasing stakeholders and manually reconciling data from multiple spreadsheets to roll up the budget. The process was cumbersome and inefficient. Plus, trying to decipher as many as four versions of the same spreadsheet at once only increased the potential for error.

Also, he'd have to print out packets for every budget meeting (for every member of the team) so they could review budget highlights and changes together. Naturally, capturing everything on paper and making sure everyone was working off the same version was often a challenge.



### SOLUTION:

Today, Natick officials use ClearGov to collaborate on the annual budget in real time. In addition to promoting internal transparency between department heads and administrators, ClearGov has eliminated the version control headaches O'Brien struggled with in the past.

Using ClearGov has also led to “more productive and efficient public hearings” as well. Budget meetings used to involve thumbing through paper printouts and jockeying to get everyone — both literally and figuratively — on the same page. Now the administrative team simply connects a laptop to a large TV monitor and goes through the budget, line item by line item, so everyone in attendance can easily see changes as they're made.

O'Brien explains, “Our team is now able to append notes, attachments, and comments to specific line items directly in the budget, collaborating in real time and reducing the amount of materials we need to print for meetings.”

This ability to annotate significant budget changes and attach relevant support documents to each line item has been a game changer. “In the past, changes and new initiatives were captured as footnotes in a presentation. Now, all the info we need is on one line and we can easily open it up for review in our hearings.”

“Having the budget online eliminates version control issues and lets everyone know where we are in the process. Instead of calling or emailing department heads, I can just go into ClearGov and access all the requests and supporting documentation in one place.”



**Sean O'Brien**  
Special Assistant to the Finance Director

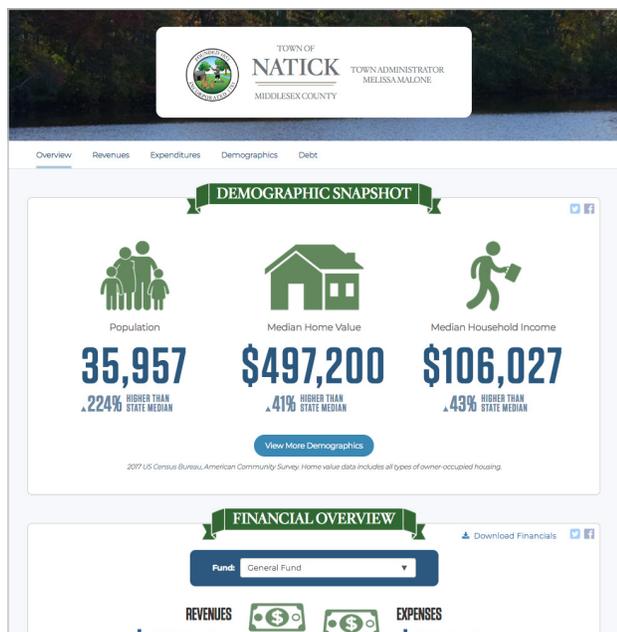
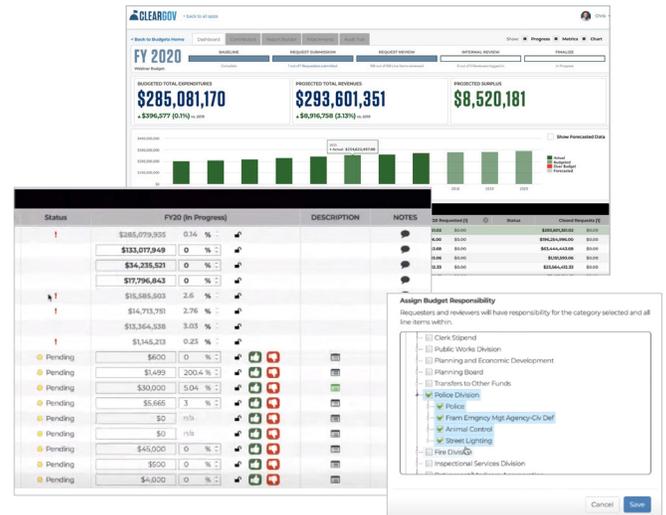
## How Natick is using ClearGov to make their budgeting process more transparent, collaborative, efficient, and accurate

Town officials work together on the annual budget in one shared master file — online.

Department heads can attach supporting documentation or notes to clarify line item requests and the finance team can easily approve or reject with a simple click of the thumbs up/thumbs down icon.

Because every change, comment, and update is now automatically tracked, documented, and archived in the cloud, Natick no longer relies on paper printouts for budget meetings.

*\*Screenshots are for example purposes only.*



Natick recently used the one-click publish option to share their adopted budget on their public-facing ClearGov Transparency Profile.

**VISIT TOWN OF NATICK, MA**  
ClearGov Profile