

2025 National 8(a) Association *Monthly Webinar Series*

Back to Basics: Budgeting 101 for 8(a) Organizations and Government Contractors

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Back to Basics:

Budgeting 101 for 8(a) Organizations and Government Contractors

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Agenda

- Introductions
- Importance of a Sound Budgeting Process
- Common Budgeting Challenges
- Budgeting Best Practices
- Budgeting Tools and Technology
- Key Takeaways and Getting Started

Speaker



Shonna Burgoyne
Vice President, Finance & Planning
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Importance of a Sound Budgeting Process

- Optimization of Project Execution and Financial Performance
- Manage Indirect Costs and Establish Provisional Indirect Rates
- Support Proposal Development and Decision Making
- Enhance Compliance and Transparency

Common Budgeting Challenges

- No collaborative process
- Inflexible tools
- Static, siloed plans
- No access to real-time data with drill down capability
- Complex allocation and cost pool structures
- No integration with ERP
- Difficult to budget by project, by resource and to see that data aggregated at roll-up levels

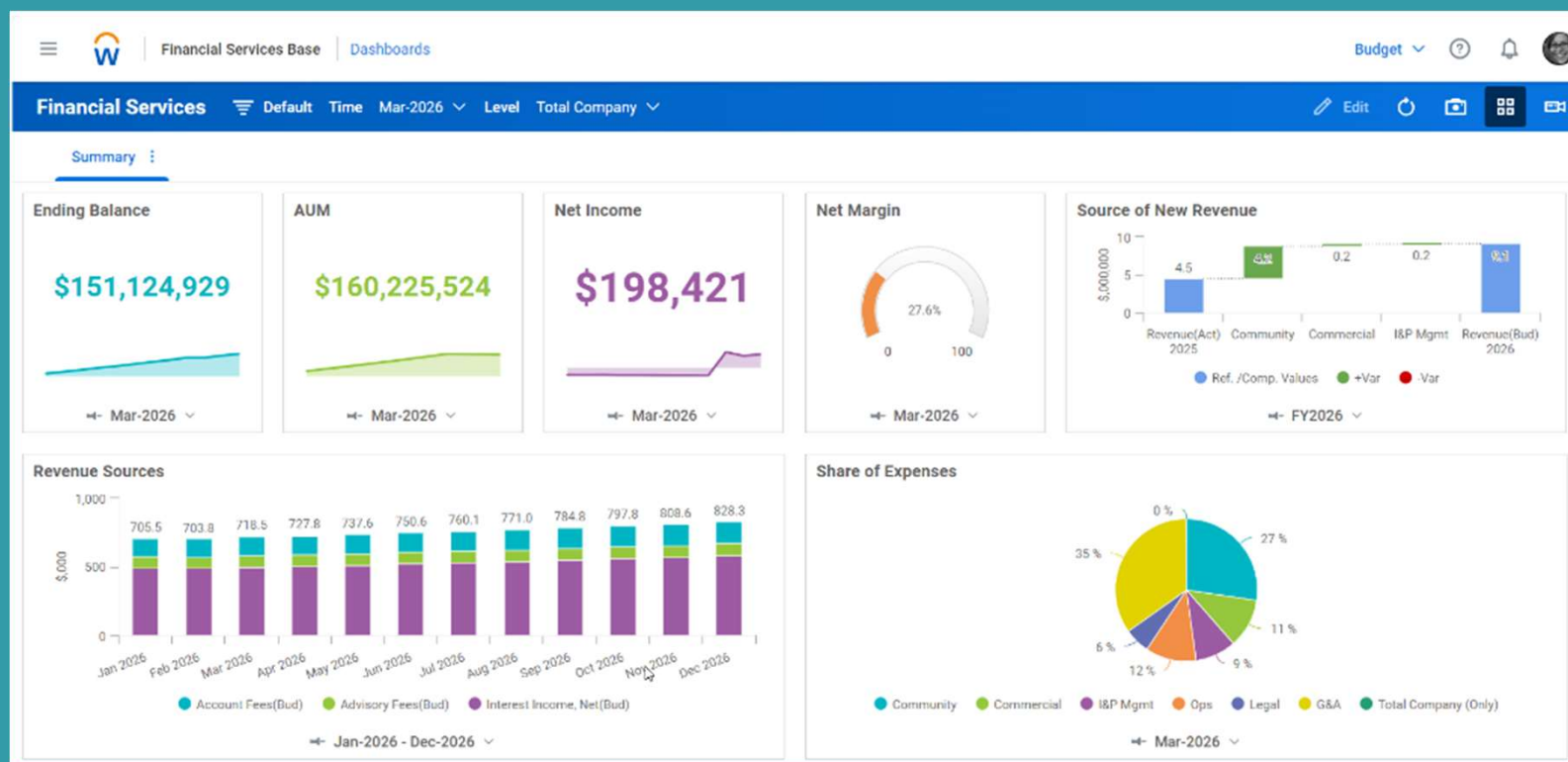
Budgeting Best Practices

- Define clear financial goals
- Collaboration across organization
- Utilization of historical data
- Detailed line-item budgeting
- Scenario modeling
- Regular review

Budgeting Tools and Technology

- Cloud-based solution that allows real-time collaboration
- Intuitive/user-friendly interface
- Driver-based modeling
- Self-service reporting
- Automated integration
- Scenario planning
- Ability to drill into transactions
- Security features

Sample Dashboard



Consolidated Utilization Plan

NeoSystems Workday Adaptive Planning Gov Con Demo Reports / Utilization - By Project by Person

Level: Consolidated Employee: Employee Time: Aug-2024 to: Dec-2026 Project Hierarchy: Project Hierarchy Type: Type

Utilization: Resource Planning

Project	Employee	Aug-2024	Sep-2024	Oct-2024	Nov-2024	Dec-2024	Jan-2025	Feb-2025	Mar-2025	Apr-2025	May-2025	Jun-2025	Jul-2025	Aug-2025	Sep-2025
		%	%	%	%	%	%	%	%	%	%	%	%	%	%
100000_002_007] NYC Inventory CLIN007 - NYC Inventory CLIN007	John, Elton T (E00026)	300%	50%	50%	50%	60%	30%	50%	50%	50%	70%	50%	50%	50%	50%
	Swift, Taylor T (E00005)	25%	25%	25%	25%	50%	25%	50%	75%	80%	80%	80%	100%	80%	80%
	Adams, John Q (E00015)	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
100000_002_008] NYC Inventory CLIN008 - NYC Inventory CLIN008	Phoenix, Joaquin T (E00011)	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	Tesla, Nikolai T (E00029)	500%	200%	200%	30%	30%	100%	25%	25%	25%	25%	25%	25%	100%	0%
	Bergman, Ingrid T (E00008)	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
C00001_000_001] COMMON STOCK MATERIALS - COMMON STOCK MATERIALS	Wright, Frank T (E00033)	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
	Pitt, Brad T (E00004)	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	Franklin, Aretha T (E00018)	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
FACADM_003] Facility 3 - Facility 3	Washington, Martha T (E00002)	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	Woods, Tiger T (E00013)	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
FEDLIT_004_001] Financial PMO Mgmt - Financial PMO Mgmt	Franklin, Benjamin T (E00030)	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	0%	0%	0%
	Lincoln, Abraham T (E00012)	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Expense Variance Analysis Report

Financial Services Base | Reports / Expense Variance Analysis (w/ YTD)

Level Total Company Time Mar-2026 Version 1 Actuals Version 2 Budget

	Mar-2026						Year to date as of Mar-2026					
	Actuals	Budget	% Var	Research	% Var PM	% Var PY	Actuals	Budget	% Var	Research	% Var PM	% Var PY
Expenses												
Payroll												
6010 Salary & Wages	253,622	274,777	8%	→	-2%	-5%	746,043	806,053	8%	→	5%	-3%
6020 Commission	52,427	55,938	7%	→	-2%	-19%	154,219	162,783	6%	→	-2%	-18%
6030 Bonus	37,354	31,575	-15%	↓	-2%	-22%	109,422	93,846	-14%	↓	-2%	-20%
Total Payroll	343,403	362,289	5%	→	-2%	-9%	1,009,684	1,062,682	5%	→	3%	-8%
Taxes & Benefits [1], [2]	65,246	75,781	16%	↑	-2%	-19%	191,918	215,139	12%	↑	-2%	-17%
Office Expenses	48,511	46,863	-3%	↔	-2%	-13%	142,698	139,801	-2%	↔	-1%	-11%
Travel & Entertainment	10,794	9,660	-11%	↓	-2%	-5%	31,751	28,382	-11%	↓	-2%	14%
Marketing	17,081	14,000	-18%	↓	-2%	-21%	50,245	42,000	-16%	↓	-2%	-19%
Total Expenses	485,036	508,593	5%	→	-2%	-11%	1,426,296	1,488,004	4%	→	1%	-9%

Drill Into: Level, Deposits, Loans

- This report compares two versions and includes variances. Active links can be drilled down upon. For example, salaries could be drilled into in order to view the data by project or org.

Key Takeaways and Getting Started

- Define clear goals and objectives
- Choose a tool that is best for your business
- Do not need to be a mature organization to have a solid budgeting process
- Improving the budget process will provide:
 - Better quality data
 - Better, faster decision-making
 - Improved trust in FP&A

Q&A

Thank you for attending

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NATIONAL 8(A) ASSOCIATION MONTHLY WEBINAR SERIES



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Thank you for joining us!

