

ORGANIZATION

**CITY OF JACKSON,  
MISSISSIPPI**

INDUSTRY

**GOVERNMENTAL**

LOCATION

**JACKSON, MS**

CASE STUDY

## **Multi-Year Strategic Financial Planning and Integrative Modeling for the City of Jackson**



**Background and Challenges:** Jackson, Mississippi, is a City rich in history and culture, known for its contributions to music, literature, and the civil rights movement. As the state capital and the most populous City in Mississippi, Jackson plays a pivotal role in the region's economic and political landscape. Despite its strengths, Jackson has faced significant financial and operational challenges. The City grappled with structural budget deficits, aging infrastructure, and a shortage of revenue enhancement initiatives, particularly within critical departments such as Police, Fire, Public Works, and the JTRAN public transportation system. To address these challenges, the City engaged Integrative Analytics leadership to develop a multi-year strategic financial and management plan (the Plan) and a related Excel-based pro forma model (Model).

**Initial Engagement and Needs Assessment:** Integrative Analytics began the project by conducting in-depth interviews with City officials, department heads, and community leaders to understand the specific financial and operational challenges facing Jackson. Public forums were held to gather input from citizens, ensuring that the Plan would reflect the community's priorities and concerns. Additionally, we established a project steering committee comprising representatives from various stakeholder groups to oversee the planning process and ensure alignment with community goals. This comprehensive engagement process ensured that the Plan would be grounded in a thorough understanding of local needs and aspirations.

**Data Collection and Analysis:** We gathered extensive financial data from City records, including revenue sources, expenditure patterns, debt obligations, and reserve balances. In addition, we analyzed economic indicators, demographic trends, and historical financial performance to create a robust baseline for projections. A comprehensive audit of existing financial practices was conducted to identify inefficiencies and areas for improvement. Geographic information systems were utilized to visualize infrastructure needs and prioritize investments based on geographic and socio-economic factors. This rigorous data collection and analysis process enabled us to develop realistic and actionable financial projections for the City.

**Development of the Multi-Year Strategic Management Plan:** The Plan included detailed projections of income from taxes, fees, grants, and other sources, providing a clear picture of expected financial inflows and outflows. The Model incorporated both operating and capital expenses, ensuring comprehensive coverage of the City's financial landscape. A Capital Improvement Plan was developed to assess the City's infrastructure needs, including cost estimates, timelines, and potential funding sources for significant projects. Furthermore, a debt management strategy was formulated to manage existing and future debt obligations, ensuring sustainable borrowing practices. The Plan adhered to the City's policies on maintaining healthy

reserves, as outlined in its Comprehensive Annual Financial Reports. Key performance metrics were established to provide real-time feedback on various financial and budgetary methodologies. Economic assumptions, such as inflation rates and population growth, were incorporated to drive realistic financial projections. This thorough and detailed planning process laid the foundation for Jackson's long-term fiscal stability.

**Policy Recommendations, Regulatory Framework Development, and Communication Facilitation:** Based on the insights from the Plan, we formulated a series of policy recommendations aimed at enhancing revenue, optimizing expenditures, and improving operational efficiency. A regulatory framework was developed to support the implementation of these policies, ensuring they were enforceable and aligned with legal requirements. Detailed policy proposals were drafted, cost-benefit analyses conducted, and legal compliance ensured. An implementation plan with clear timelines, responsibilities, and resource requirements was developed. New revenue enhancement initiatives, such as revised tax policies, public-private partnerships, and grant acquisition strategies, were introduced. Operational efficiencies were recommended through process reengineering and the adoption of best practices in public administration. Crucially, we facilitated communication between the City administration (CFO Department and Office of the City Manager) and individual departments (Police, Fire, Public Works, and JTRAN) to ensure smooth implementation of new policies and regulations. This holistic approach ensured that all stakeholders were aligned and that the proposed changes would be sustainable.

**Community Engagement and Adoption:** The Plan and policy recommendations were presented to the City Council and the public, facilitating open discussions and addressing concerns. Unanimous adoption of the Plan by the City Council and widespread acceptance by the local citizen base were achieved. A public awareness campaign was conducted to educate citizens about the benefits of the Plan and garner support for its implementation. This broad-based community engagement was critical in building trust and ensuring the successful adoption and implementation of the Plan.

**Outcomes and Impact:** The implementation of the Plan had a profound impact on City. This included a balanced budget within two years, eventual elimination of the structural deficit and establishment of a sustainable financial foundation. Major infrastructure projects were initiated, including road repairs, water system upgrades, and public facility renovations, enhancing the quality of life for residents. Increased funding for the Police and Fire Departments led to improved response times, better equipment, and enhanced community safety programs. Policy developments within the JTRAN public transportation system resulted in expanded routes, increased frequency, and better accessibility, thereby improving mobility for residents. Enhanced funding and policy adjustments for the Department of Public Works facilitated better maintenance of City services, including waste management, water supply, and public infrastructure. Integrative Analytics' approach to policy and regulation development, exemplified by our work in Jackson, Mississippi, showcases our ability to provide comprehensive, data-driven solutions that drive fiscal stability, operational efficiency, and community well-being.