

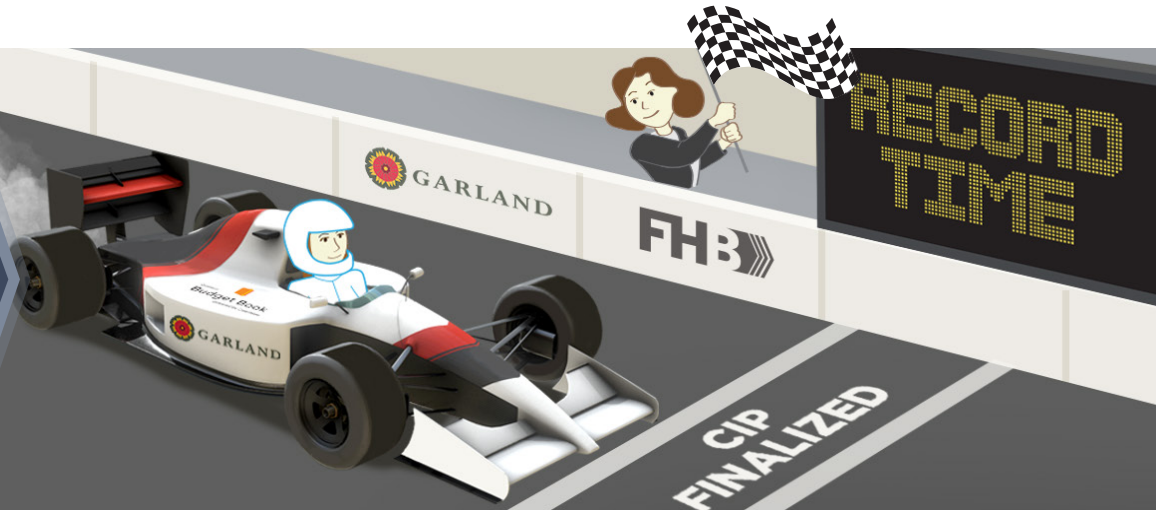
The Forward-Thinking City Of Garland Overcomes 3 Budget Challengers With 1 Project



GARLAND

2020-21 Operating Budget:
\$774 million

Solutions:
Questica/Caseware



The city of Garland is located northeast of Dallas, with a population of nearly 240,000, it is one of the largest communities in the Dallas/Fort Worth Metroplex.

We interviewed Allyson Bell Steadman, Budget Director at the City of Garland to find out more about their recent project to improve how they prepared their budget and budget book, including the Operating Budget and Capital Improvement Program.

Time to change

Like many organizations, the city of Garland's Budget Department relied on antiquated, complicated, and very manual processes to prepare their budget book. We asked Allyson to briefly outline what their process was before implementing their Questica Budget Book powered by Caseware solution with F.H. Black and Company Incorporated.

"Our Operating Budget Process was to compile our Budget Book through a series of Excel and Word documents that needed to be formatted, reconciled, converted to PDF, compiled through PDF, and page numbered through PDF. This was a very manual process that took approximately two months," says Bell Steadman. "For our Capital Improvement Program, we had a custom Access database that was the input form for our annual CIP "project sheets" and supplemental Word and Excel documents. We would compile these sections through PDF to reconcile and page number. This process took approximately a month. It was also a very manual process."

These manual processes were costing Allyson and her team of four highly skilled Budget Analysts and Senior Budget Analysts time that could be better utilized on the myriad of higher-level tasks more worthy of their expertise. Allyson knew that gaining efficiencies through eliminating these manual processes would allow her department to better serve their community.

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CHALLENGE

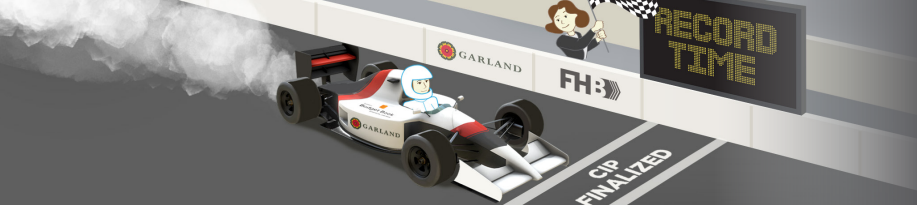
The city's reporting processes were slow, disjointed and error-prone. They relied on legacy software to prepare the budget and a combination of Word, Excel, and Adobe Acrobat to prepare the Capital & Operating Budget Books.

SOLUTION

The city decided on Questica Budget to prepare the budget, Caseware to prepare the budget book, and FHB to ensure the solutions were optimally implemented to maximize their benefits and guarantee project success.

RESULTS

The city now has a robust, documented, repeatable, and largely automated process for preparing the budget book.



City of Garland

"The Budget & Research Department is in a much better position to produce and distribute budget documents. Our most recent success was having our 2021 Adopted CIP document finalized for publication on the City's website and distribution to City Council two weeks after adoption."

Allyson Bell Steadman
Budget Director, City of Garland

The RFQ that changed everything

While acutely aware of the inefficiencies the city endured in preparing their budget book, Allyson had a more pressing inefficiency to deal with in replacing their legacy budgeting software. Allyson issued an RFQ

for a replacement solution that would interface with the City's existing systems and manage all aspects of their budget planning, review, and adoption. When she realized they could also automate much of their budget book preparation process at the same time with FHB, Allyson seized the opportunity.

"We heard about FHB through our RFQ process for a new budget system. As we selected Questica, the Budget Book powered by Caseware was an influencing factor in our decision for a dual implementation contract," explains Bell Steadman.



STEP 1

Training with the team at FHB

In order to collaborate with the City, the team at FHB started by getting them up to speed with their new tools.

"The training is extremely useful for those who will be working hands-on with their Caseware Budget Book. The training laid the foundation of how to navigate and make changes in Caseware."

STEP 2

Automating the Capital Budget

Once the City's Capital Budget was set up in Questica and the data verified, it was time to integrate it with Caseware to automate the Budget Book.

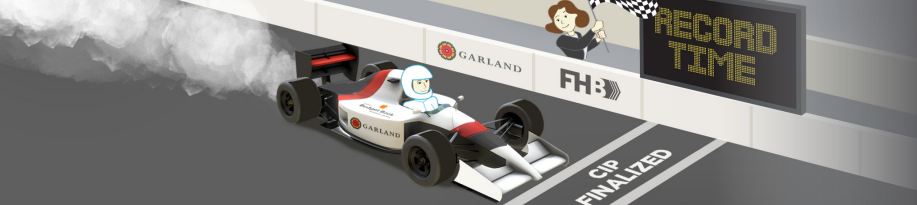
"Our FHB Manager of Implementation Services built our Capital Budget Book Template based on our previous budget documents with our input and we were able to import our data from Questica directly into the template. We were able to produce and publish our Proposed and Adopted 2020 CIP using Caseware by the end of the implementation."

STEP 3

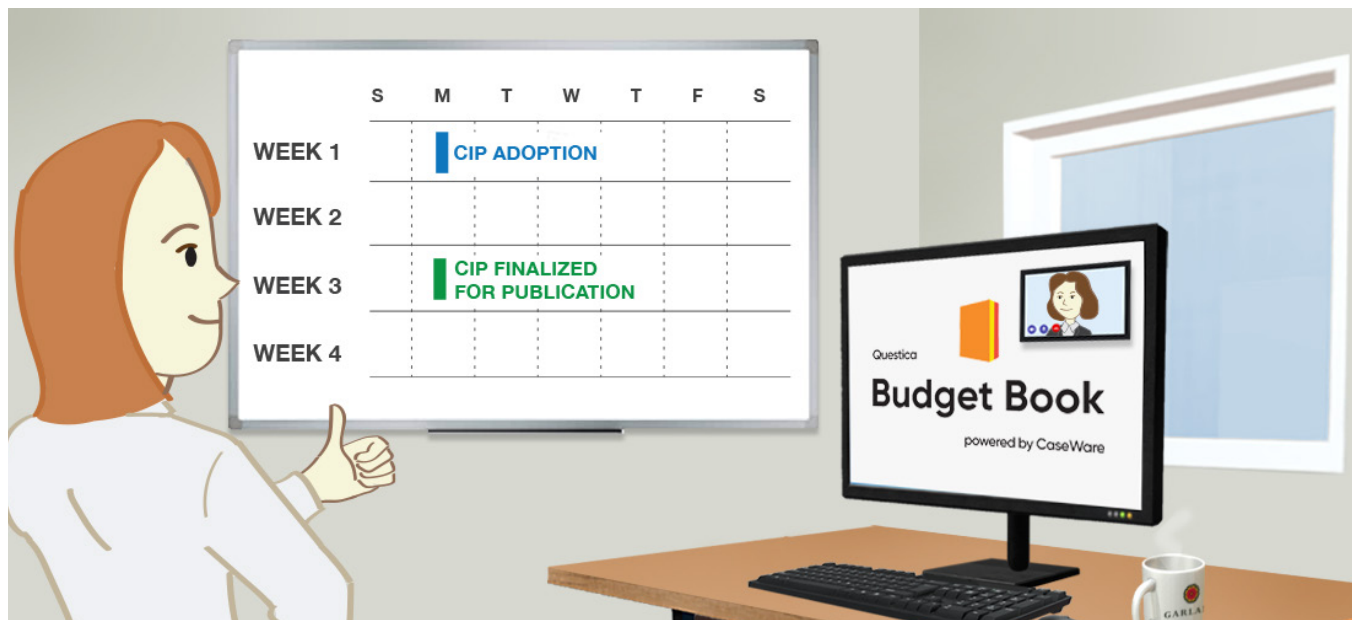
Automating the Operating Budget

The last step was to set up and automate the Operating Budget Book.

"We went through a similar process for our Operating Budget Book after the Capital implementation was complete. Our FHB Manager of Implementation Services built templates for each fund type we had. From there, our team worked with the manager to build out every fund and customize as needed, as well as build a personnel template that would present data directly from Questica. We were able to produce and publish our Proposed and Adopted FY 2020-21 Operating Budgets using Caseware by the end of the implementation."



City of Garland



The Results

In a sixteen week period, the City of Garland significantly modernized its Budget Department while simultaneously publishing their Operating and Capital Budget Books. They replaced legacy and generic solutions with solutions built for budget departments and customized specifically for their organization. This resulted in documented and repeatable processes that save time, mitigate the risk of error, and result in a better functioning budget department supporting the residents of the City of Garland.

Advice for other Public Sector Finance Departments

We wrapped up our interview by asking Allyson about the city's experience with the team at FHB.

"Both principal consultants were extremely knowledgeable, understood our processes, provided ample information, and responded and addressed all issues, questions, etc. in a timely manner."

We asked what she would tell other public sector finance departments considering a similar project.

"The time investment required during the implementation pays off."

"I would recommend it to other Finance and Budget departments to automate and expedite their Budget or Comprehensive Annual Financial Report document production process."



For over 25 years, F.H. Black & Company Incorporated has worked with finance and budget departments in government, education and corporations across North America to crush waste, & eliminate inefficiency.

Our mission is to ensure that our finance & budget departments do more with less, do it better than it was done before and do it in less time.