Deschutes County Success Story

Population:
204,801 (2021)
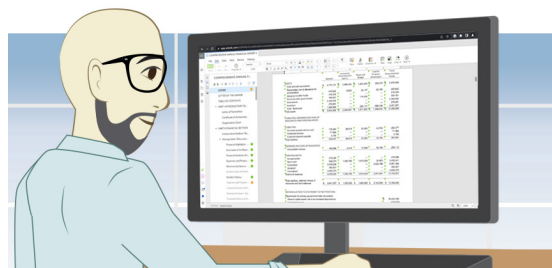
Solutions:
Wdesk and Wdata

The Need

Deschutes County, Oregon's finance and budget department was looking to streamline business processes, reducing the time it took to prepare and produce their annual budget book. So, they reached out to F.H. Black & Company Incorporated for help.

The Solution

Together with the FHB team, the county evaluated its existing processes, identified opportunities for improvement, developed a list of must-haves and set out to find the right solution. After investigating eight or nine of the industry's leading platforms, they settled on Workiva's Wdata and Wdesk.

Wdata is the database used to store an organization's data. Wdesk is the report writer that pulls information from Wdata to generate reports. So, when changes are made in Wdata, all reports tied to that database automatically update in all relevant locations. The combination of Wdesk and Wdata offers a solid cloud-based, automated solution that allows simultaneous collaboration of all budget book contributors and enables instant generation of reports.
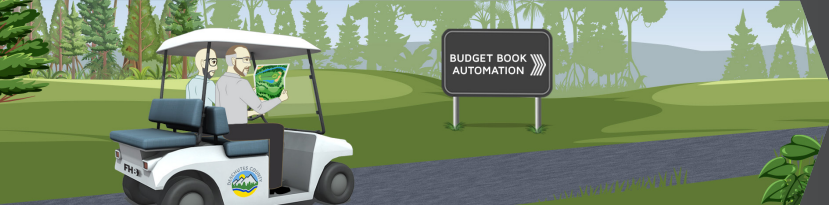
"We absolutely love Workiva! We needed something we could automate every year and where people could all meet in one place and work on their narratives at the same time. It's been a really good solution. FHB steered us in the right direction."

– Daniel Emerson,
Budget Manager at Deschutes County

The Implementation

Deschutes County staff members were not only happy to find the right tool, they were also impressed with FHB's implementation team. "The [FHB] staff are incredibly skilled, very knowledgeable. Darryl [Darryl Parker, CPA, Director, Solutions Design & Architecture] went above and beyond," Daniel said.

Deschutes County

The Impact

Daniel estimates that the implementation has saved the county up to a month and a half of work per year, reducing budget book preparation process time by 65%.

> *"It's extremely valuable to our county as we look into long-term forecasting. By the end of July, the product will have paid for itself. My staff and I are already talking about things we can automate next year to make it even more efficient."*

65%

BUDGET BOOK PREPARATION TIME REDUCTION

In addition to the time and cost savings, the project has benefited the Deschutes team with more formalized business processes, improved organization, reduced errors, and process repeatability.

"It's been extremely helpful to give our business managers and department heads access to the narrative [section]—so they can all go in at same time to work on their narratives, instead of sending … emails back and forth with Word attachments."

The Right Fit

Because every organization, department, and project is unique, FHB offers a variety of implementation options. At one end of the spectrum is **delegated** implementation, meaning the county would primarily rely on the FHB team for implementation. The Deschutes team would provide some information, but most of the work would be completed by FHB. This is the most expensive option; it requires the least effort from the client and is fast.

Alternatively, FHB offers a **guided-self** implementation option. This is the least expensive option and would require more work from the Deschutes team. In this case, FHB would provide initial infrastructure setup, training, guidance, and any additional custom development work requested.

Confident in their ability and availability to drive the project (with help from FHB as needed), the Deschutes team opted for a guided-self implementation. This meant that the county's team would be involved in nearly every step of the implementation process, coming away with greater familiarity with and understanding of the solution.
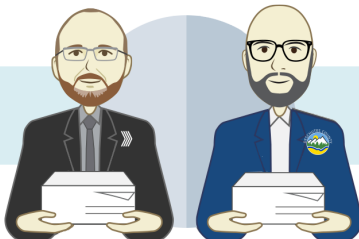
If, at any point, Daniel and his team require additional support, they can always turn to FHB. "We haven't signed on for any aftercare because it's running so smoothly," he said. "We don't feel like we need it right now, but we can order aftercare from FHB if we get stumped or need it [in the future]."
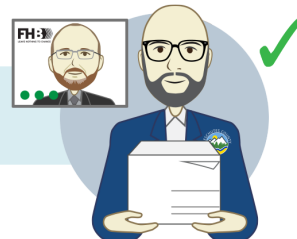
DELEGATED IMPLEMENTATION   JOINT IMPLEMENTATION   GUIDED-SELF IMPLEMENTATION
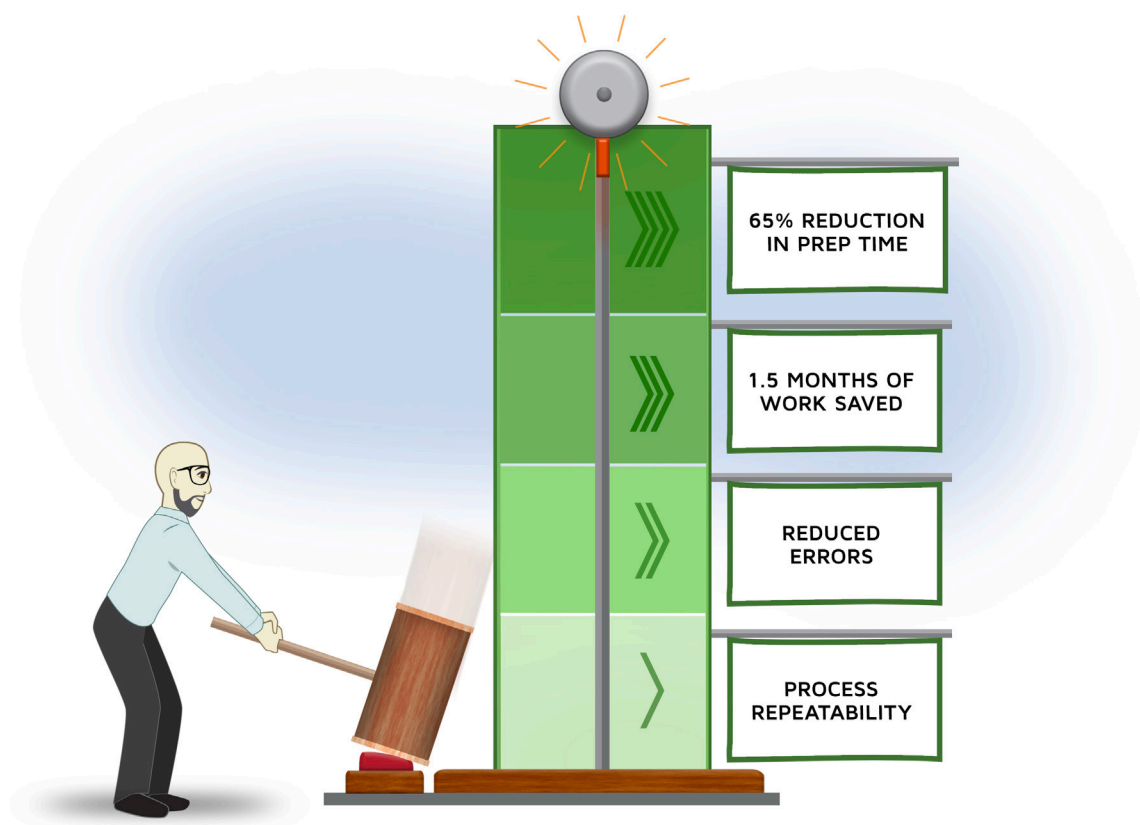
Deschutes County

Pro Tip

To ensure project success, Daniel recommends **making the implementation a priority** within your organization and assigning someone on your team to serve as the project's **champion**.

"You need someone from IT (Information Technology) to set up a Secure File Transfer Protocol (SFTP) connection, but for the rest, you don't need someone technically skilled, just someone invested in the process who is willing to learn."

What's Next?

In light of his team's success, Daniel predicts that the county's accounting manager will soon reach out for help with automating their Annual Comprehensive Financial Report (ACFR). "We recommend F.H. Black for that [implementation] as well."

65% REDUCTION IN PREP TIME

1.5 MONTHS OF WORK SAVED

REDUCED ERRORS

PROCESS REPEATABILITY

FHB *LEAVE NOTHING TO CHANCE*

For more than 25 years, we have ensured public sector finance & budget departments like yours optimize their most challenging and time-consuming processes.

Automating the drudgery to focus on high-value work is so essential to our clients that they choose to Leave Nothing to Chance. They engage us to review their processes, recommend, implement & support the ideal enabling technologies and best practices.

Book a meeting to discuss how we can automate your Budget Book process.

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