

What a Difference a Year Made for the City of Fort Wayne



Population:
263,886 (2020 Census)
Solutions:
Workiva

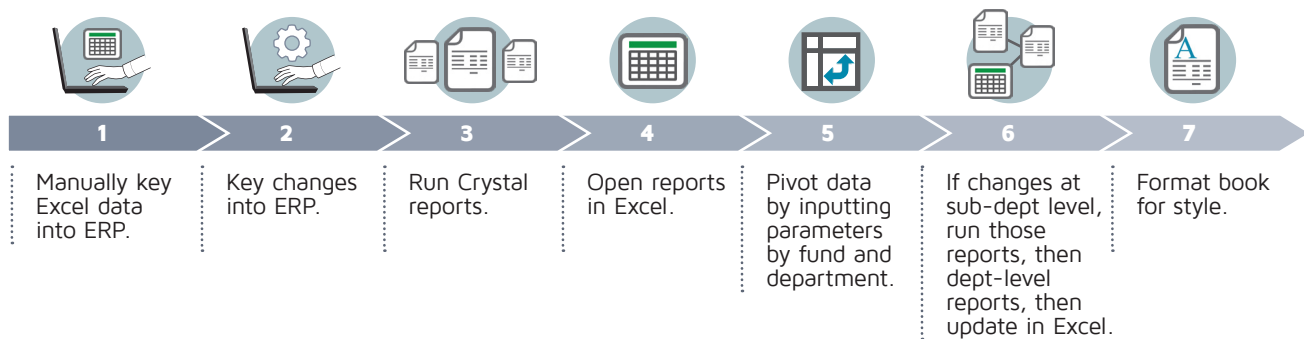


The Need

As Finance Manager Kathleen Smith embarked on her sixth year of budget-book preparation for the City of Fort Wayne, Indiana, her frustration peaked. The process was cumbersome, to say the least. Her team was manually entering numbers into their ERP system,

Munis. Then, they ran “clunky” and painfully slow Crystal reports. Next, they would open the reports in Excel, then pivot the data by inputting parameters by fund and department.

The Old Way



If they made a change to the budget amounts in Munis, they’d have to rerun reports, check them, go back into Excel and update summaries. If the city’s controller asked for updated data based on an adjusted allocation, it could take an entire day to produce.

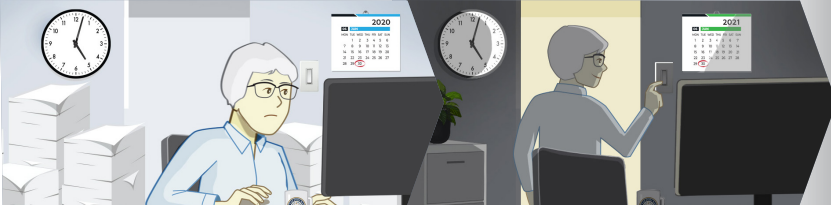
“One number change created 30-45 minutes of additional work.”

With red pen in hand, Kathleen’s team reviewed printed reports to catch misspellings and erroneous data. Much of that review was conducted in the evening and on weekends. “We were working on

30 budgets across a whole series of disconnected spreadsheets.”

The team not only spent countless hours of personal time gathering and preparing data, they were also charged with manually formatting the budget book for font consistency, page numbering, adequate spacing, helpful graphics, and overall cosmetic appeal.

In summary, the city’s budget book process was complicated, time-consuming, and prone to error. And it would be terribly difficult to hand off to newcomers, should Kathleen or her team change roles.



City of Fort Wayne

A Better Approach

So, what ultimately pushed Kathleen to make a change? "Accountants are always looking for better, more accurate, and efficient ways of doing things," she said.

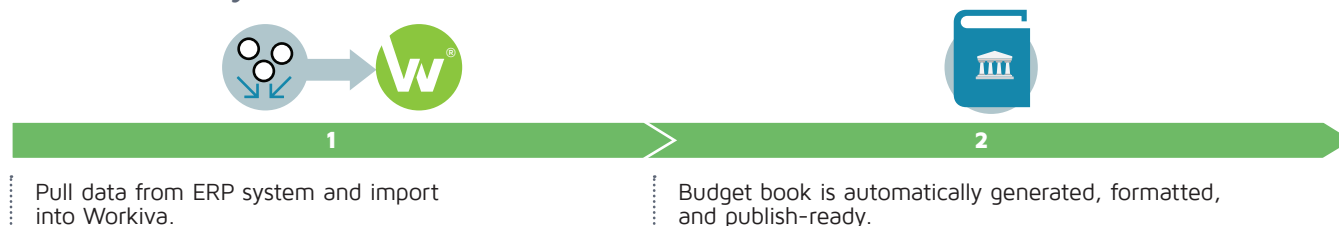
Two years prior, the finance department had moved their Annual Comprehensive Financial Report (ACFR) into Workiva's Wdesk.

"I thought there had to be more uses for this. It was a powerful tool. It eliminated lots of manual work; everything linked and updated automatically."

The cost of implementing new technology is always a major consideration, but the city had already invested in the Wdesk software. "The process improvement in working through our ACFR proved it was worth our while," Kathleen said.

With new funds and sub-departments being added regularly, Workiva would allow her team to keep up with the increased workload, without working overtime or hiring additional staff.

The New Way



The Difference



Implementation: Working with FHB

Kathleen was introduced to FHB Solutions Advisor Michael Spurlin, who had previously worked for Workiva, during the city's original Wdesk implementation. "He 'gets' the process flow. He speaks our language," she said.

Once she and Michael determined the city's needs, FHB Director of Solutions Design & Architecture Darryl Parker, CPA, stepped in to help. "He was very patient. He worked with our IT department and showed me how it all works, so I could set it up myself. He helped me understand how to make changes and put a process in place."

FHB Principal Consultant Christine Gilbert, CPA, leveraged her public finance experience to help set up the city's department templates. She walked Kathleen through formulas and design, in uncomplicated terms.

"It was helpful to have CPAs onboard. They know the technology and the accounting side. They didn't make me feel stupid. They answered all my questions and made it make sense for me."



City of Fort Wayne

The Results

- ✓ Information is automatically pulled from Munis into a database, eliminating the need to key in data and run reports.
- ✓ Each department can enter their budget information directly into Workiva.
- ✓ Data can be easily adjusted to model outcomes in an instant.
- ✓ Everyone can work in the document at the same time.
- ✓ The program is not bogged down by report generation.
- ✓ Training for the new system is simple, taking less than one hour.
- ✓ FHB trained Kathleen to make her own changes without relying on a third party.
- ✓ FHB helped Kathleen create a replicable process so that others can take over in her absence.
- ✓ Finalization and formatting are automatic. The budget book looks great.
- ✓ No more evenings and weekends.

"I can't say enough about how much efficiency, accuracy, and functionality has improved."

What's Next?

Kathleen feels well-equipped to take on the city's 2023 budget book preparation and publishing. Of course, FHB will be on hand to provide support, when and if it's needed. Kathleen can also revisit her virtual training sessions and meetings with the FHB team, which were recorded for future use.

Now that so much of her team's manual work has been eliminated, Kathleen looks forward to focusing more on data analysis—digging more deeply into the "why" behind puzzling figures and significant changes. That kind of attention will produce better budgets, ultimately benefiting the entire community.

As a side note, the city's financial leaders are so pleased with the new budget book process, they are planning to apply it to the revenue side of operations.

Change can be daunting, especially when it means building consensus among multiple stakeholders.

Kathleen's advice? "The world changes and we have to keep up with that. We can't just keep doing what we're doing, it's not working."



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.

F.H. Black & Company Incorporated
+1 844 852 5225 (Toll Free)
email: info@fhblackinc.com | www.fhblackinc.com