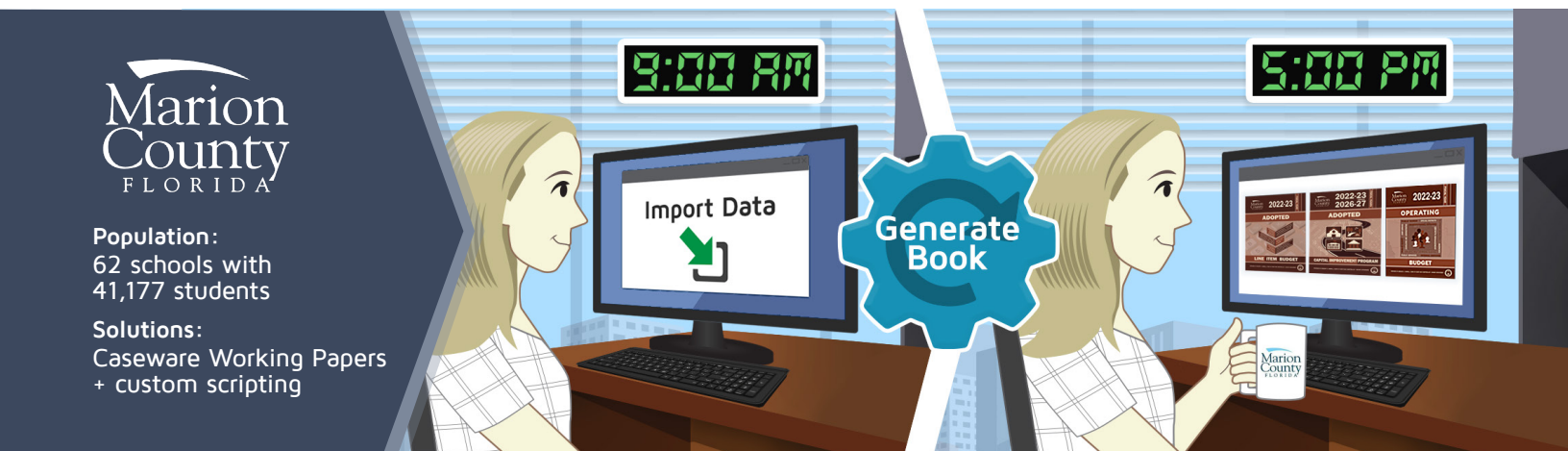


Marion County Success Story



Marion County
FLORIDA

Population:
62 schools with
41,177 students

Solutions:
Caseware Working Papers
+ custom scripting

The Need

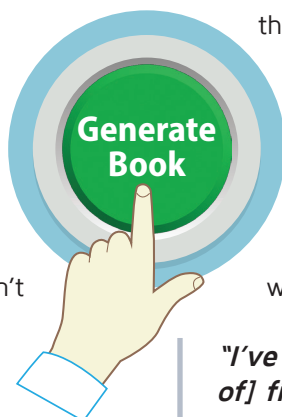
When Audrey Fowler took over as budget director for Marion County, Florida in October of 2020, her department was using GovMax for report generation, with little success. "We had no customization. Updating ... the report was a trial. It was very expensive [to write reports]," she said.

Her team then switched to a new system, Tyler Munis. Audrey recalls, "[Tyler's] stock reports... used for budget books were atrocious. Our county commissioners wouldn't accept [the reports] ... because [they] were not up to the standards they were used to." When Audrey asked Tyler what it would take to replicate her existing reports, their best quote was \$150,000 and six months.

Other companies suggested that she just, "take her Excel stuff and link it up." But Audrey has never used

Excel; she understands the risk of error associated with linking reports to a series of cells and formulas instead of using a database. "In 18 years, I've never done it that way," she said.

One company offered to script Caseware for her, but **F.H. Black & Company, Inc. offered more.** "[FHB] sold me on... automatic scripting where I could just do a couple of exports, imports, and click a generate button [to] get my [budget] book—which is what I wanted."



"I've got a billion-dollar budget and [a staff of] five people, so I don't have 40 hours to spend in a week to put the [budget] book together."

**Audrey Fowler, Budget Director,
Marion County, FL**

The Solution

The team at FHB guided Audrey and her staff through a customized Caseware implementation. With FHB's help, the Marion County team made reports stylistically consistent, automated balances, optimized summary content, and even deleted a redundant report. "And that saved me 30 pages," she said.

Before, while using GovMax, her team, "...had no ability to edit or enhance ... add in or manipulate [data]. Whatever went into the computer would be reported." FHB's solution gave Audrey's team more control. They can pivot the data to present it in a variety of ways.



Marion County

The Solution (continued)

Audrey describes the FHB implementation team as thoughtful and involved. “[They] took feedback, didn’t trample all over us, but added value. Our final reports are cleaner, [our] presentations nicer... and we were able to get things done on time.”

“[Darryl Parker, CPA, CMA, director of solutions design and architecture at FHB] was fantastic, very responsive, ... amazing. I threw some crazy stuff at him.”

The county’s IT team is also pleased with the project’s outcome, as the new reports code PDFs with bookmarks, etc. “We just had to do a little extra ... to make it ADA (Americans with Disabilities Act) compliant,” Audrey said. “[Our] other books took hours to validate for ADA compliance.”

RESOURCES



5 Staff

BOOK GENERATION TIME



8 Hours

RESULTS



3 Annual Budget Books

The Outcome

In the end, Marion county’s new budget book process is flexible, repeatable, easy to learn, and mitigates errors. And it takes Audrey’s team a total of eight hours to generate all three of their annual budget books—that’s 700 pages, fully scripted and publish-ready.

“I was skeptical at first. But [FHB] made a believer out of me. [I am] very pleased with the project.”

So, what’s next? Considering the success of her budget book project, Audrey plans to apply for a Government Finance Officers Association (GFOA) award for excellence. Her team meets with FHB for budget-book troubleshooting as needed, but as a testament to the comprehensive nature of FHB’s implementation, they have yet to require any additional training hours. Should the need arise, training is covered through the county’s Service Level Agreement (SLA).



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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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