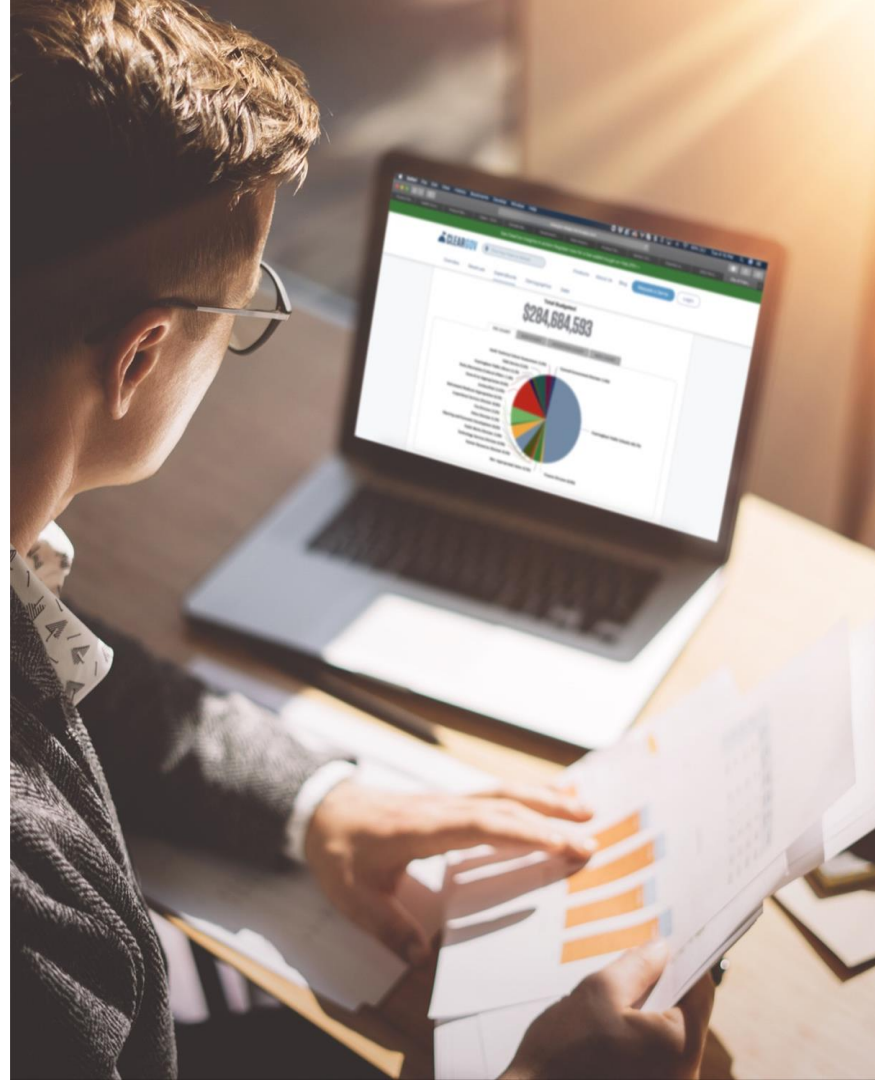**GFOATN - ClearGov Presentation**

The Shift to Website Based Budget Books

Presenter:

Stacey Blackstock
Market Development Executive at ClearGov

Legacy Budgeting Cycles are

Scattered
Documents, emails, notes, etc. are spread across multiple inboxes and desktops.

Disjointed
Excel, Word and email are distinct, generic products that inhibit collaboration.

Tedious
Constructing, combining and correcting multiple spreadsheets is taxing, tiresome and time-consuming.

Operational Budget

Personnel Budget

Budget Book

Modernization is a Must!
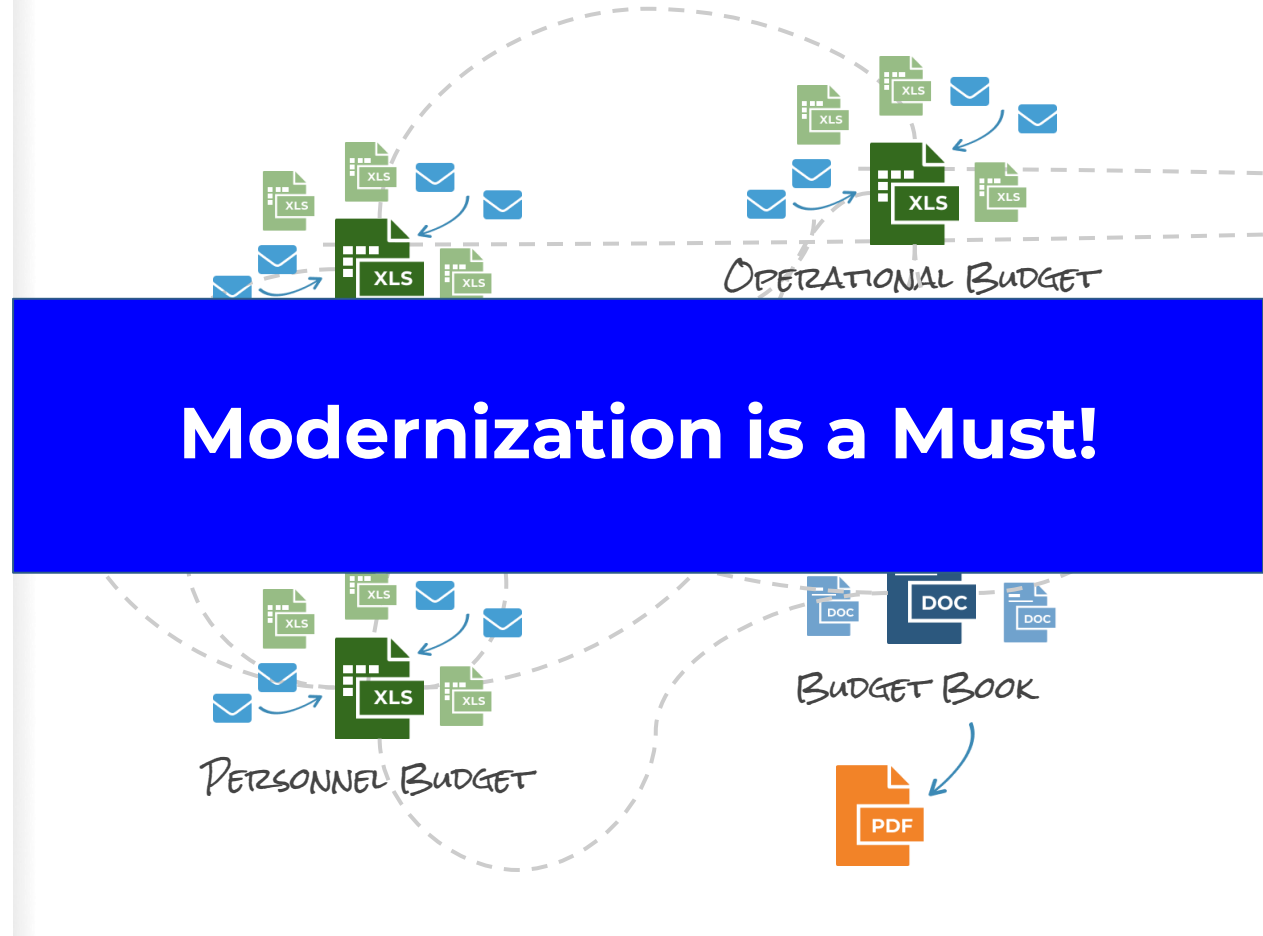
Solution

Hundreds of municipalities and counties are moving to cloud-based technology to save time and better communicate their annual budgets
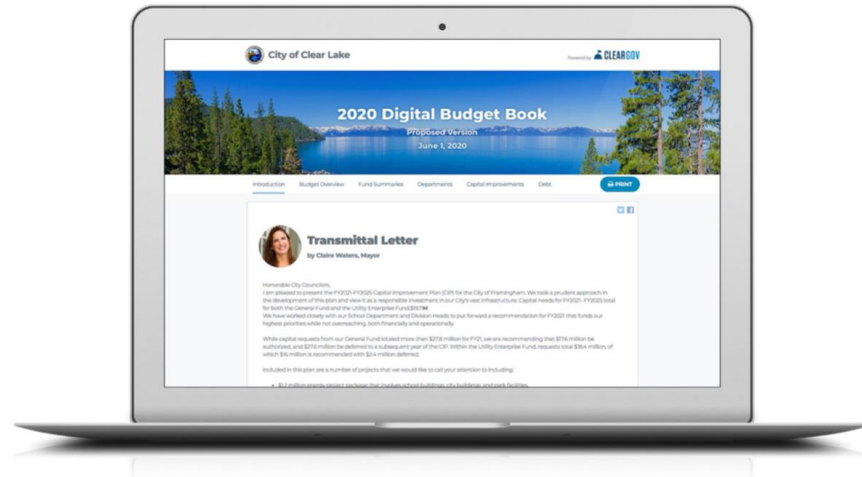
The Evolution Of Budget Books

	Print	PDF	Website-based
Navigation	Flip Pages	Clickable	Clickable
Financial Figure Maintenance	Figures quickly outdated	Figures quickly outdated	Figures automatically adjusted
Charts	Static	Static	Interactive
Social Media Shareable	No	Poor User Experience	Yes
Print Customization	None	None	Select Sections to Print
Mobile Viewable	N/A	Poor User Experience	Dynamic formatted for mobile
Video	None	None	Easily Embeddable

Tips: How To Better Communicate Your Budget

Fund Summaries
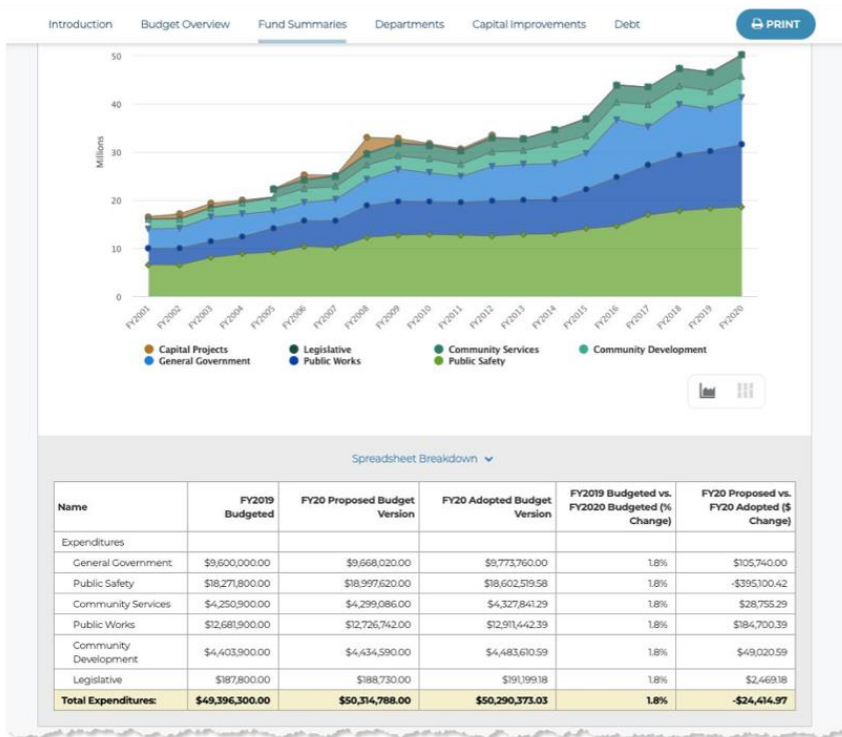
Old Way: Pages made up of Excel spreadsheets or hard to read ERP reports. Maybe a static chart built manually via Excel

Modern Way: Automated, interactive pages of your entire fund structure

- Summary, Fund, Function, Object, and Fund Balance panels with charts/graphs and data tables
- Present multiple charts/graphs together
- Allows viewer to consume data from multiple angles

Department Pages

Old Way: Collaboration across departments is difficult with legacy tools; burden on budget teams to get information in book

Modern Way: Streamlined budget book process allows for real-time collaboration

- Departments to directly enter Missions, Descriptions, Goals, Accomplishments, Org. Charts
- Interactive KPIs/Performance Measures
- Admin controls ensure proper formatting, spell and grammar check

Capital Budget

Old Way: Excel spreadsheets and Word documents manually added to budget book

Modern Way: Integrated digital request forms to streamline the collection, creation and communication of your Capital Budget

- Automated One-Year Capital Budget and Multi-Year CIP sections
- Interactive request pages with images, attachments, maps, and charts/graphs
- GFOA: Capital vs Operating Costs; easily communicate your evaluation criteria

Statistical/Supplemental Information
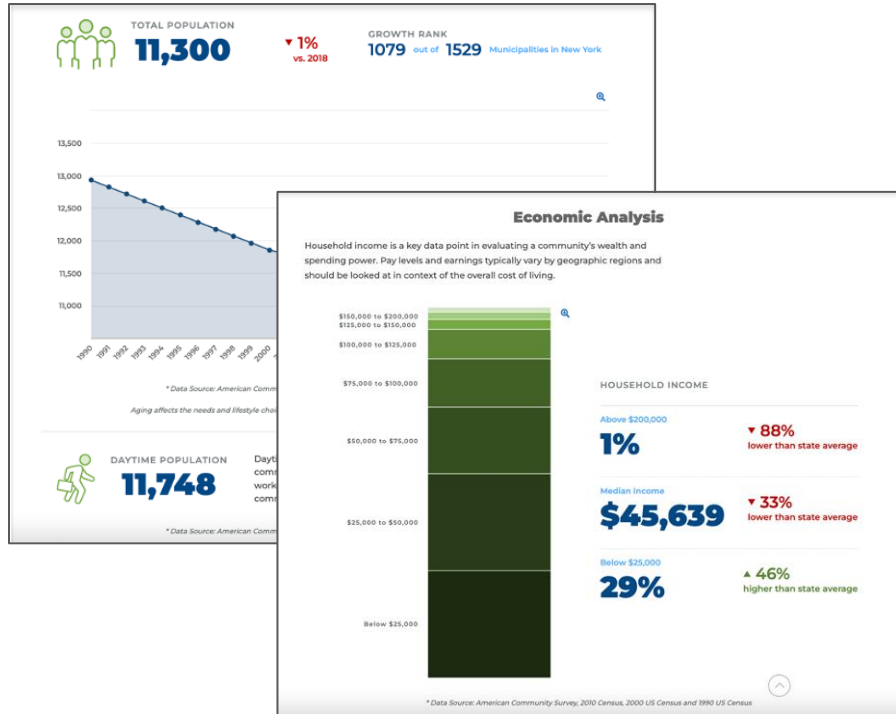
Old Way: Manually adding statistical and supplemental information in the budget to provide context behind financial decisions

Modern Way: Automated templates and pre-populated information each year

- Automated and interactive demographics pages with benchmark statistics
- Automated glossary; Organizational chart; Fund structure; Budget timelines

Executive Overview
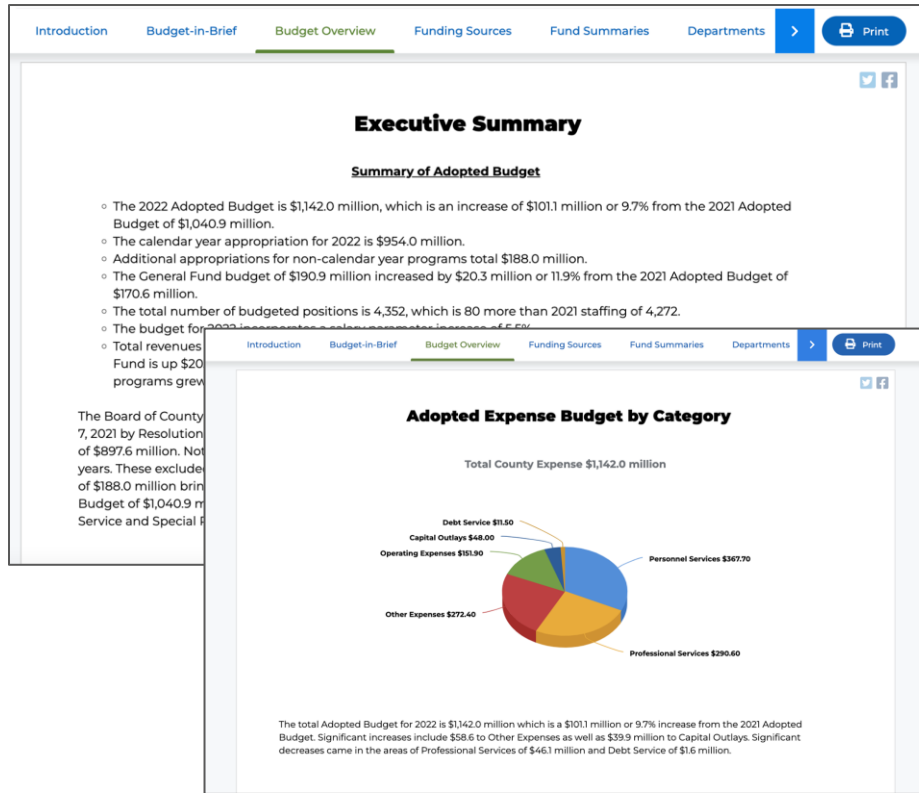
Old Way: Manually creating Budget Overviews or Budget-in-Briefs to summarize significant budget items and trends

Modern Way: Software can help you produce this content in minutes

- Take what you've already done and copy/clone it
- Interactive chart builder that already has your financial data
- Linking documents is easy via a website-based budget
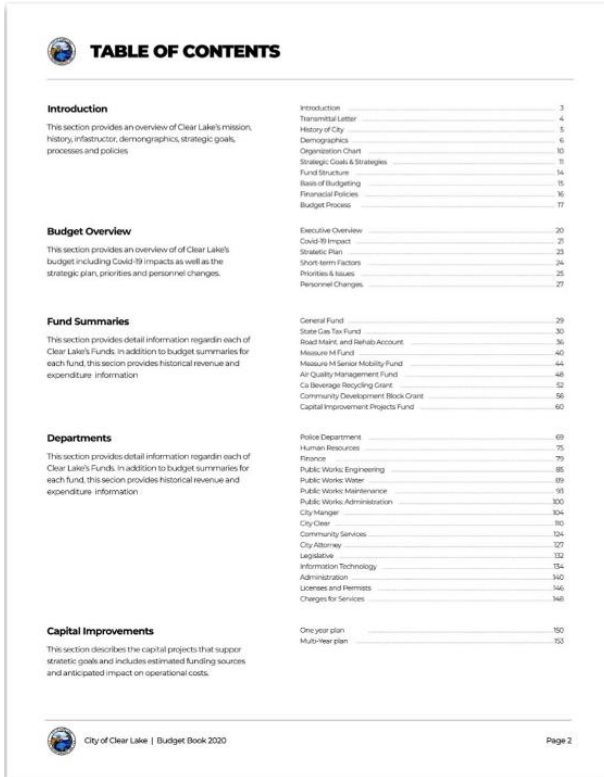
Table of Contents

Old Way: Your budget book should include a table of contents. Very manual to build and hard to ensure proper numbering. Difficult to navigate as a reader

Modern Way: Automated table of contents

- Printed: Properly numbered and dynamically linked out-of-the-box
- Web-Based: Navigation bar is a modern take on a classic. Makes it even easier for a viewer to consume your budget book

Accessibility
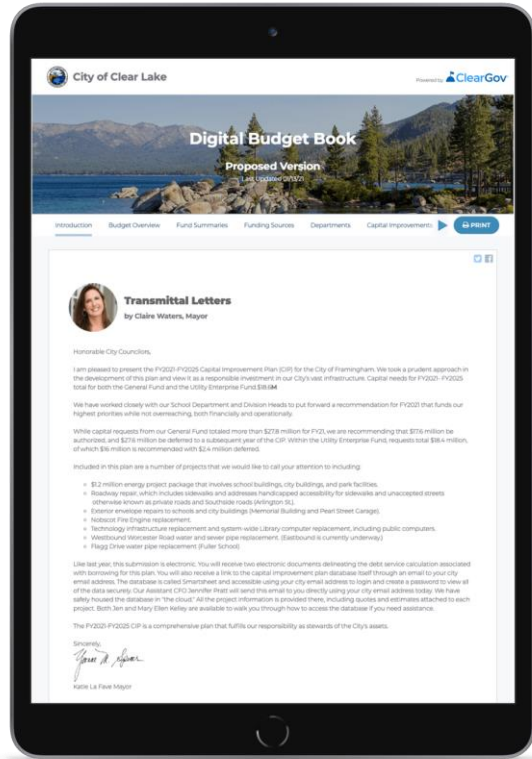
Old Way: Static PDF document posted on your website

Modern Way: Website-based budget book ensures your document is produced and formatted in the most understandable way for the average reader

- Mobile-friendly and tablet-friendly
- Interactive charts/graphs; downloadable attachments; videos embedded
- ADA-optimized
- Print-ready with a click of the button

Easy and Repeatable Process

Old Way: A mad-dash to get the budget book produced in-time to meet your deadlines

Modern Way: An easy and repeatable process that yields exponential time savings each year

- Copy forward allows you to go from version->version/year->year seamlessly
- The numbers, charts, tables, and some text will update based on the new data
- Constant and never-ending improvement now becomes the focus

# GFOA Distinguished Budget Presentation Award
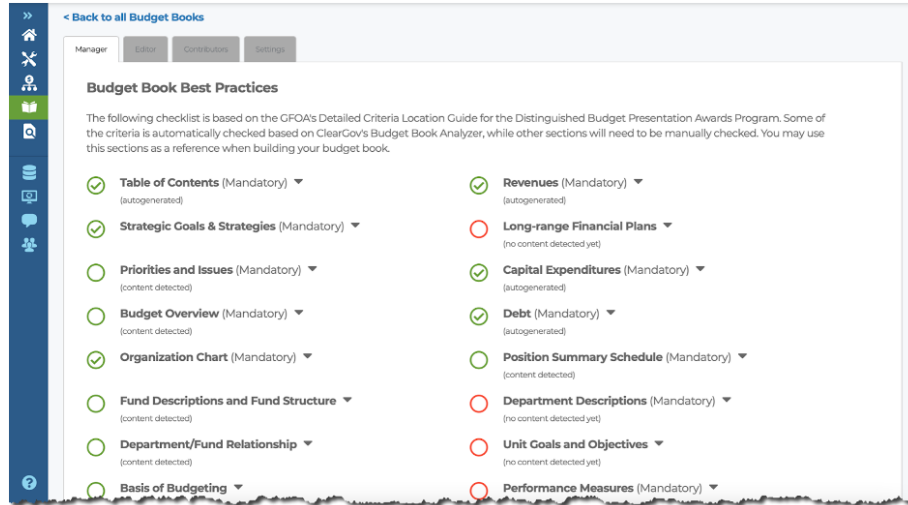
Old Way: Hundreds/thousands of hours of extra work required to build a GFOA Budget Presentation Award winning budget book

Modern Way: Automated GFOA-ready templated budget book

- GFOA Budget Award checklist
- You know what's mandatory and optional
- Built-in criteria and detailed suggestions/notes
- Easier than ever to submit

The New Fiscal Year
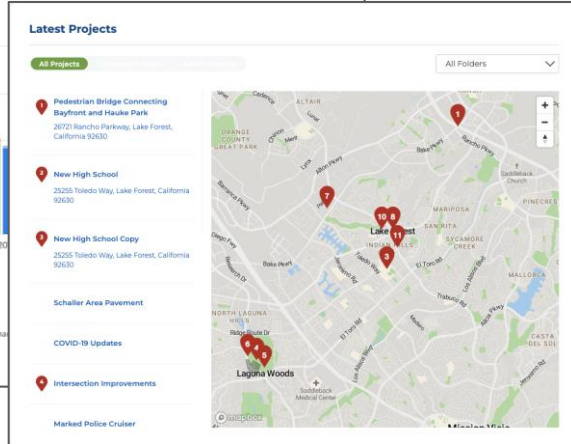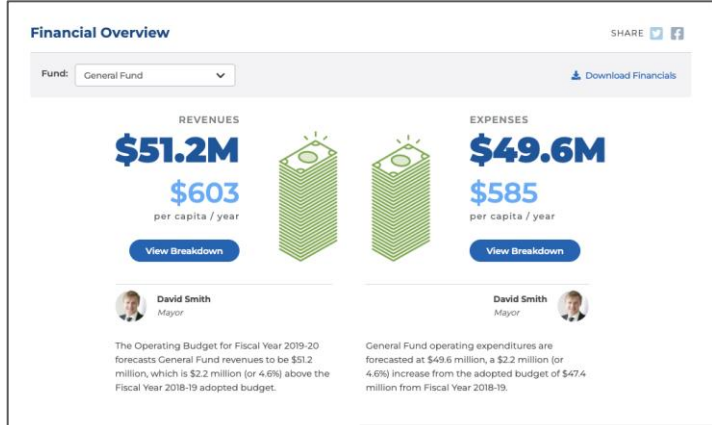
Old Way: Budget vs actual reporting done manually and siloed

Modern Way: Cloud-based financial transparency dashboard

- Easily track and report budget vs actual activity throughout the year
- Interactive charts/graphs and data visualization for stakeholders internally and externally
- KPI/performance dashboards and capital project transparency sites

Summary

A website-based budget book is the most effective way to communicate your budget. Modern, cloud-based technology can help you both save time and improve the way to present your annual budget internally and externally to the public

Thank You!

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