OPENGOV

Diamond Bar, California, Enhances Budget Process with OpenGov's End-to-End Budgeting Solution

AGENCY TYPE
City Government

POPULATION
57,000

ANNUAL BUDGET
$29 Million

Named one of the "Top 10 Towns for Families" by Family Circle Magazine, Southern California's Diamond Bar is a thriving residential community located at the crossroads of one of the region's busiest business interchanges. Among the top-rated business locations in the state, the City maintains business-friendly policies that drive healthy residential and commercial growth projections. Though citizens exhibit pride in their well-run city, their engagement in the budget process tends to be relatively low. City staff sought to leverage OpenGov's platform to streamline the internal budget planning process and produce a final budget document that could better engage the public.

OpenGov Budget Builder™ Makes Budget Planning More Collaborative

For some time, it had been apparent that the budget planning process in Diamond Bar could be improved. Management Analyst Dannette Allen first learned of OpenGov's Budget Builder while on one of OpenGov's monthly informational webinars. "Budget Builder touched on a lot of key points as far as saving time, minimizing errors, having a centralized location where everyone could work simultaneously, and the capability of going in and approving different parts of the budget," she said. "We were really looking for an end-to-end solution, where all the information was exported from our finance system, as well as one that would deliver us a final product that we could then take to the City Manager and Council for their review."

Because OpenGov's end-to-end budgeting solution aligned so well with the City's goals, the team implemented it with Finance Director Dianna Honeywell leading the platform's internal organization. Using OpenGov, the team subsequently replicated the structure of the City's budget. "Each department got its own proposal, and within that, it had its divisions," Honeywell said. "That was for the General Fund, and then we had a proposal for the Special Revenue Fund as well, so we broke it out by sections in our budget document." In this way, each department head could access his or her own proposal and make changes directly to it in a centralized location.

Honeywell acknowledged that, in the past, getting everyone going and thinking about their budget figures at the start of the process had been a

Diamond Bar's team adopted OpenGov Budget Builder to make the budgeting process more collaborative and streamlined among department heads. (Image: iStock)

struggle. "But with OpenGov," she noted, "people were less intimidated and just went in there and did it. They complimented us on how easy it was for them. They didn't mind as much doing the budget; it wasn't as overwhelming." The platform, "made it easier for everyone to identify what it was they were working on," Allen added. "It definitely met our needs as far as ease of use for staff. That was key for us, and we received quite a few compliments that it was easy to use."

Smooth Implementation and Training Process

Diamond Bar's staff said they could not have been happier with OpenGov's implementation process. "The OpenGov team – they are amazing," Honeywell said. "They did a fabulous job – within 18 hours ––getting us setup with every single account code we could have possibly needed." Allen added, "The responsiveness was

incredible. They always had an answer for us and were always open to recommendations and suggestions. I was just blown away by their level of professionalism and knowledge of the system."

The training for department heads and others involved in inputting data was also well-received. "Department heads seemed to really enjoy their involvement with OpenGov," Allen said. "Once we figured out the best way to structure our proposals, it was really easy to go into the system and build them out the way we wanted to."

Greater Internal Efficiency and Collaboration

Before OpenGov's implementation, Honeywell and her staff relied exclusively on Excel spreadsheets to develop Diamond Bar's budget. "This created its own set of problems with complicated formulas and people not being able to get into a workbook if someone else left a file open," Honeywell noted.

While Diamond Bar had created a shared drive where staff could access the various budget documents, the spreadsheets did not allow for members of the same department to work in a file simultaneously. "Each section – Administrative Services, Public Works, Recreation, etcetera – would have its own file, but different members of the same department wouldn't be able to jump in and work in the document at the same time," Allen said. That posed significant problems with the larger departments such as Public Works and Recreation, which had multiple staff members engaged in budget preparation.

OpenGov facilitated collaboration and streamlined the process, as staff could work within the budget anytime they needed to without the constraints of file sharing or static spreadsheets with no version control. "We were definitely able to work more collaboratively using OpenGov," Honeywell said.

Published Stunning Budget Document in OpenGov

Before adopting OpenGov's budgeting solution, Diamond Bar's budget book was more about the process than the product. "The budget book became just about getting the numbers in, then spending time checking the formulas and making sure everything was tying. It was very numbers-oriented and not about the document at all," Honeywell said. She added, "It was so ugly before, and there was nothing I could do because I was spending so much time making sure everything flowed correctly and was tied."

Consequently, the team sought to streamline the process of producing the annual budget document. They adopted OpenGov's collaborative budget document creator, OpenGov Budget Book powered by Wdesk™. "Within the Wdesk platform, the ability for the Finance Director and I to communicate with each other was such an easy way to keep track of any questions we had, and communicate with one another basically in live time," Allen added. "The breakdown of the document outline as far as organization is so much better than scrolling through a Word document or publisher file. You have an outline on the left-hand side, and you click and get exactly where you need to be without scrolling through pages. That platform was just amazing."

With the budget book final product looking as good as the fiscal sustainability within, Allen anticipates bidding for awards and receiving renewed external interest.

Immediately upon its release, the final product earned the team internal praise. "Even my City Manager, who was initially worried about the process and the product, came back and said, 'I love it; it's perfect. It has everything in the same place and is very comprehensive,'" Honeywell said.

Not only is the team proud of the final document, but it is also easy for non-financial staff and the public to review and understand. "We wanted it to be so you don't have to be a finance major or CPA to look at it," said Allen.

Future Time Savings and New Citizen Engagement

Honeywell previously owned much of the budget's manual implementation, in addition to her high-level oversight role. Merging multiple Excel files together along with the narrative files in Word not only proved time-consuming, but it also created printing difficulties with page numbering and cohesive formatting. OpenGov's collaborative budgeting model significantly simplified the process.
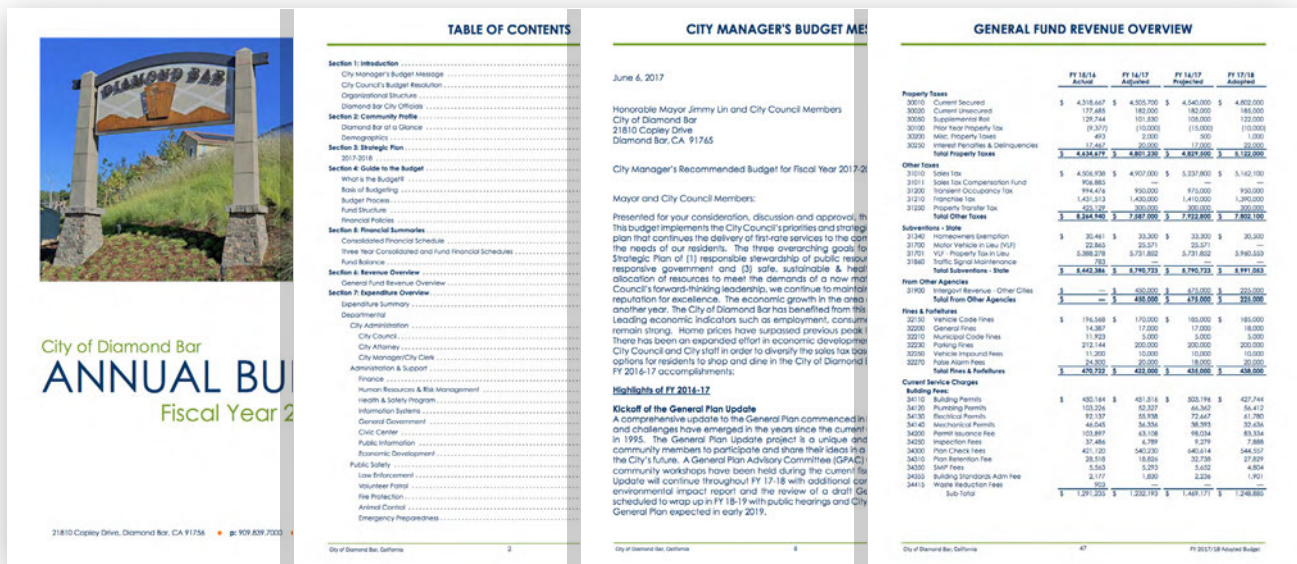
Using OpenGov Budget Book powered by WDesk developed a beautiful, cohesive budget book, which serves as a more effective communication document.

"For me," Honeywell said, "it's understood that when budget season starts, I can't do anything else. I have to work a lot of overtime, and not see my family as much. OpenGov is going to improve my quality of life, and allow me to do both my regular job as well as the budget."

"I absolutely anticipate recognizing time savings in coming years," Allen added. "All of the account codes and account strings are already there, and the mapping is in place, so the numbers will basically land exactly where we need them to go."

As the City updates its general plan for the first time in decades, Honeywell and Allen anticipate that more citizens will become engaged in Diamond Bar's finances and budget process. Having an accessible and easy-to-understand budget book ready will make it easier for the public to digest information and become involved. "More people are looking at us now," Honeywell said. "Having this type of budget book will make it easier for the public to access and digest information."

RESULTS

✓ **Streamlined Budgeting Process.** OpenGov's centralized online budgeting environment enabled multiple staff members to develop, submit, approve, and reject budget proposals simultaneously.

✓ **Enhanced Budget Collaboration.** The platform's features enabled decision-makers to comment and discuss real-time changes within OpenGov Budget Builder and OpenGov Budget Book powered by Wdesk.

✓ **Significantly Improved Budget Book.** With time formerly spent merging data and tying numbers freed up, Diamond Bar's Finance team can focus more on the final budget product and submit for awards.

✓ **Time Savings.** With OpenGov's end-to-end budgeting solution in place, the Finance Director can continue to attend to other strategic priorities, even during budget season.