

# Burnet, Texas Streamlines Budgeting and Reporting With OpenGov



AGENCY TYPE  
City

POPULATION  
6,077

ANNUAL BUDGET  
\$28.5 Million

There's a good deal going on in Burnet, Texas. It's true that a good portion of its 6,000-person population consists of retirees and "snowbirds" that come during the winter to enjoy Burnet's mild weather and lakes. You'd expect the government not to have a lot to manage.

But the city happens to own an eighteen-hole, nationally-renowned golf course, and that's just the beginning. Burnet's \$28.5 million budget includes operations for Police, Fire, EMS, Parks, Streets, Utilities (the city purchases electricity but owns and maintain its own distribution system), and an airport. So, when Burnet's 110 employees come to the office every day, they wear many different hats and rarely have a dull moment.

Budget Director Connie Maxwell praises the staff's dedication to public service and efforts to serve citizens as effectively as possible. However, until recently, Burnet faced technological hurdles that hampered both budgeting and management reporting – preventing the city's government from operating at its full potential.

- **No Budgeting System:** Burnet built its budgets in Microsoft Excel. Burnet's staff had to send spreadsheets back and forth as they swapped proposals and edited various line items. Maxwell and her staff had to track and reconcile dozens of spreadsheets, often going line by line to find changes. And when errors arose, it often took an entire day to find the formula or value causing the issue. Maxwell also explains how Burnet struggled to track who made which change, and why. These clerical tasks consumed hundreds of hours, distracted the team from evaluating proposals and discussing alternatives, and prevented as much collaboration as possible with the council.
- **Inadequate Financial System:** Burnet's accounting system logs transactions, but cannot run meaningful management reports. It outputs neither graphs, multi-year data, nor information across funds. Maxwell explains how she had to dump data from her ERP into Excel, clean it up by manually copying, pasting, and applying formulas, then format charts and graphs. And for

multi-year reports, Maxwell had to run multiple queries then merge the reports in Excel. This workflow prevented department managers and councilmembers from gaining rapid insights into expenditures against the budget.

- **Siloed Departmental Information:** Each department stored its own information in spreadsheets, manually updating graphs and reapplying formulas. When the City Manager and Budget Director needed to prepare a Council report or answer a question, they had to request information from each department – causing a delay of several hours or even days in getting an answer. If the council needed a cross-departmental answer, Maxwell had to manually merge multiple departments in Excel.

Burnet began searching for solutions to these problems that could empower staff and managers to operate at their maximum potential. During this search, they found OpenGov – a budgeting, management reporting, and open data solution.

## Burnet Cuts the Time Spent Budgeting in Half

Maxwell, deployed OpenGov’s Budget Builder software to streamline the city’s budget process. Through automatic reconciliations, Maxwell was able to instantly see how each proposal would impact the budget. This insight let her quickly adjust line items as needed to balance the budget instead of running a series of time-consuming calculations in Excel.

Maxwell also engaged both staff and councilmembers throughout the process, increasing buy-in and support. Budget Milestones reports let Maxwell share the budget’s process across the organization. And instead of worrying whether someone would fill in a spreadsheet properly, Maxwell could focus on evaluating proposals and strategy since OpenGov provided a single place for proposal submissions.

Ultimately, Maxwell was able to cut the time she spends on the budget’s clerical work in half. “Budget season has always been an ordeal – I worked late every night, plus through weekends. OpenGov has changed this entire process, giving me back my life and opening up enough time for me to focus on other priorities for the city,” she said. Gone are the days of digging around in spreadsheets and enduring lengthy proposal submission cycles. OpenGov has streamlined much of the clerical work involved in budgeting.”

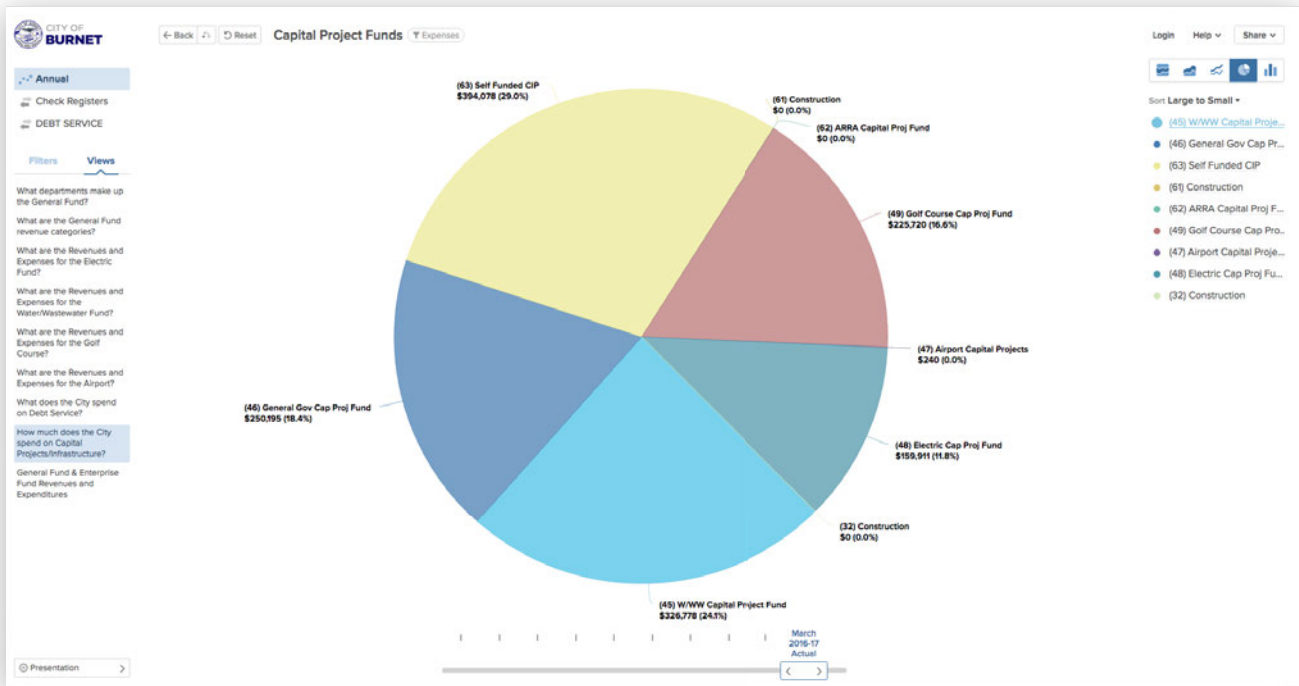
## Burnet Implements a Successful Management Reporting Initiative With OpenGov

“What is the total amount we pay for employee health coverage across all funds?” Burnet’s City Manager asked Maxwell. He didn’t expect an immediate answer and started to move on, expecting her to come back in a few hours or days with the answer.

So, he looked surprised when Maxwell replied, “Sure. Hang on a second.”



Burnet’s management team delivers services to a population that fluctuates with the seasons, requiring effective systems for tracking cyclical trends. (Photo: iStock)



Flexible reporting helps the City quickly visualize and analyze its expenses across departments.

Maxwell explains how she pressed a couple buttons, pulled up an OpenGov report on my screen, and a moment later, he had his answer, ready to take back to the Councilmember who initially wanted the information.

“Holy smokes!” he exclaimed, “That’s pretty slick.”

OpenGov gives Department Heads, the City Manager, Council members, and even citizens one place to go for multiple years of financial and statistical information, whether the data originated from Burnet’s financial system, a department’s operational spreadsheet, or another source.

Maxwell explains how she runs reports across funds, automatically generate interactive graphs and tables populated with subtotals and totals, and customize viewing permissions to maintain informational security. Burnet even runs reports it couldn’t run before. For example, the city can compare the Fire Department’s monthly expenses against its share of General Fund revenue.

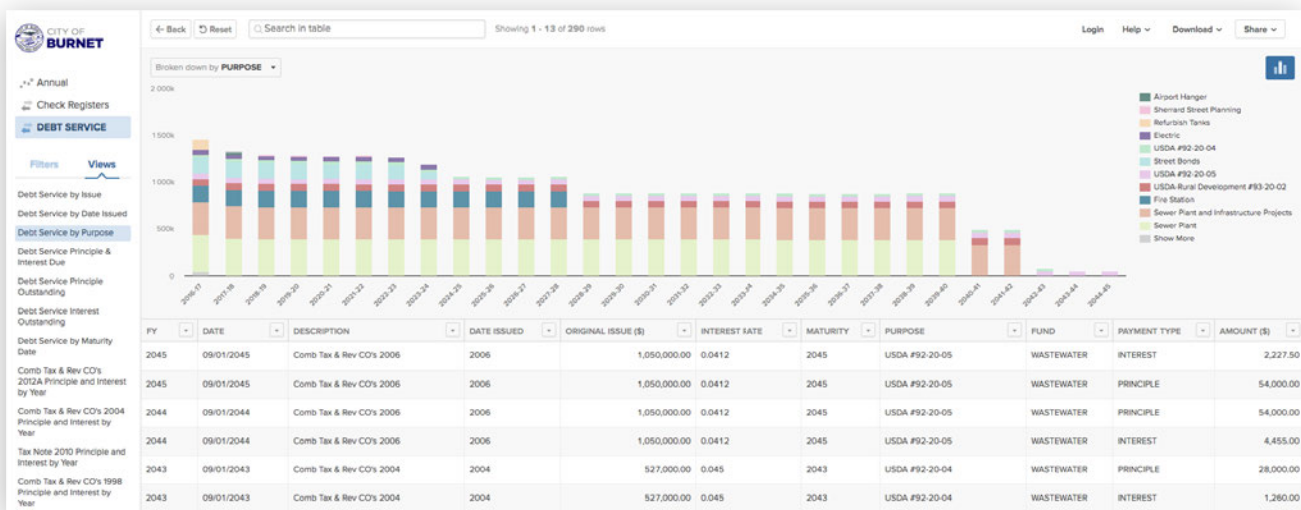
Here are some examples of reports Burnet uses across the organization:

- Monthly departmental budget to actual reports:** For each department, Burnet has reports that track monthly expenses against the department’s share of General Fund revenues. The City Manager, the respective Department Head, and finance staff can access this information simply by logging into OpenGov. Burnet uses these reports both for council meetings and to quickly answer questions from councilmembers and staff.
- Annual report:** The Annual Report displays multiple years of budgets, expenses, and revenues across funds on the same screen, solving the issue we had with our financial system. Burnet can drill down, filter, and bookmark important information without having to re-query our ERP.
- Payroll analysis:** Burnet is compiling payroll data into OpenGov, including hours and dollars, to create reports we can search, filter, sort, and graph.

This deep dive across multiple years helps us detect trends and flows in payroll. The city can see how changes affect budget to inform future planning such as the five-year forecast.

- **Cash and investments:** This interactive reports enables Council and the Finance Team to track our financial position and the status of our bank accounts. They can access this information on their own. Council especially relies on this report to make financial decisions, and enjoys on-demand access to this information.

- **Capital projects:** Council, citizens, and managers can track strategic capital projects. They can explore multi-year budgets, expenses, and revenues across funds. We made a Saved View (think of it as a bookmark) on our Transparency site so citizens and businesses can stay in the loop.
- **Debt service:** Our debt service report shows debt interest expenses, which kinds of debt were issued on which dates, and why we issued it. This information informs both management and citizens.



Burnet's Debt Service report enables the city to assess and communicate its long-term debt costs.

## RESULTS

- ✓ The Cut time spent budgeting by 50%
- ✓ Launched comprehensive management reporting solution
- ✓ Engaged elected officials with mission-critical reports

## CONCLUSION

Burnet's staff like to emphasize how, in Burnet, there's a lot going on. But with the city's budgeting and management reporting now on track, Maxwell is now more confident than ever that Burnet has the infrastructure in place to effectively plan for the future, deliver services, and engage stakeholders within and beyond the organization.