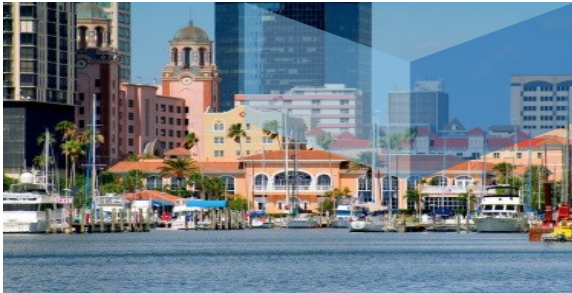# City of Largo, FL
Case Study

> "If we can find out what the public cares about, and translate that into budget impacts, while driving them to use OpenBook, which is interactive and easy-to-use; that would connect all the dots."
>
> Meridy Semones, Manager, Office of Management & Budget, City of Largo

About Largo

The City of Largo, Florida is the fourth largest city in the Tampa Bay Area, with more than 80,000 residents. Established in 1905, Largo began as a rural farming community, and overtime developed into a densely populated suburb. Notably, Largo was the first town in Florida, and second in the nation, to establish a town manager form of government in 1913. Overtime, the City of Largo has continued to grow and develop, and is working towards the vision of becoming "The Community of Choice in Tampa Bay."

Business Need

The City of Largo has a high volume of requests and management decisions required to produce the City's annual budget. Their previous financial system required a significant amount of manual entry, and was incapable of managing multiple budget scenarios. The City relied heavily on static spreadsheets, repetitive points of manual data entry, and there was nothing dynamic about their budget documents.

There was also a desire from city commissioners to have more budgeting information available to Largo's citizens, that was easy-to-read and understand. The City wanted to present their annual budget to the public in a medium that would allow internal and external stakeholders the ability to access their city's budget at any time. The City needed a dynamic budget reporting system that would reduce manual procedures and improve the workflow process, plus allow the sharing of data with various stakeholders.

Population
84,500

Financial System
American Data Group (ADG)

Number of Employees
1,000

Questica OpenBook and Questica Budget
(Operating, Salary and Capital)

Business Benefits

Transparency
- Online dashboard with visual aids to illustrate budgeting transparency
- Easily accessible online by embedding OpenBook data into the Questica visualization dashboards, including Capital budget
- Privacy and accessibilities setting customizable for different dashboards
- Dynamic approach to portraying budgets to both internal and external users
- OpenBook Project Explorer for capital budgets showcasing all CIP projects on an interactive map
- Balancing Act's budget simulator (integrates with Questica Budget)

Budgeting
- All budgeting in one system
- Scenario based budgeting and forecasting
- Reporting and analytics
- Ease of use

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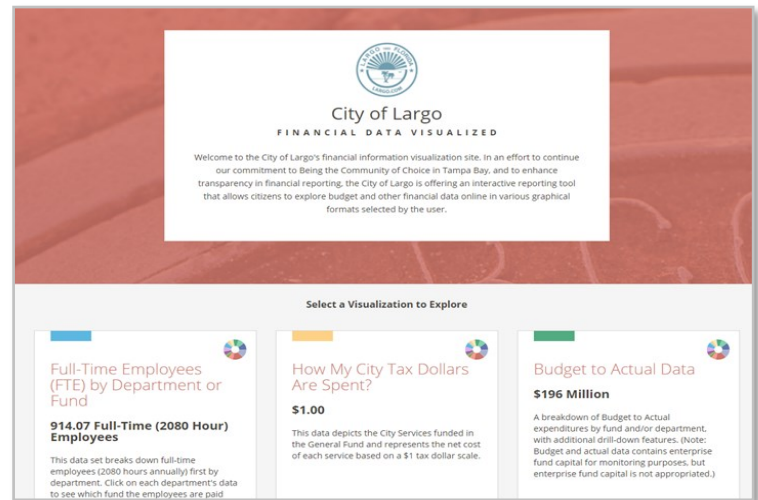Where brilliant begins.

Business Challenge

The City of Largo recognized the increasing demand to provide city officials and its local citizens with easily accessible and educational information on everything related to financial reporting, accounting, purchasing and budgeting. "How are my tax dollars are being spent?", is a common question that the public asks the City to answer on a regular basis. Interacting with a large printed document (or even an online PDF document) can be very time consuming, and the information is static and not always up-to-date. The City of Largo wanted an interactive tool to highlight and communicate with both internal and external stakeholders a variety of financial snapshots, including revenue sources, and comparisons of expenditures to budget. Data needed to be communicated in a more engaging manner and that could be accessed by both the public and city officials.

The City's budgeting process before Questica Budget required a significant amount of manual entry into 1,300 spreadsheets. It took over 1,500 hours of staff time to generate baseline personnel data, and the previous module was incapable of managing multiple budget scenarios. Budgeting collaboratively was also difficult and time consuming with spreadsheets, and it was challenging to share information with stagnant documents.

A solution was needed to replace the pre-existing practices with a single, unified system that could manage their budgeting requirements, and needed to provide an interactive reporting tool that would enhance transparency in financial reporting, but did not require hours of manual data entry.

Solution

The City of Largo issued an RFP in 2015 for a budget reporting and analysis software solution, with integrated personnel, operating and capital budget systems. The initial review of proposals resulted in a brief list of suppliers, who were brought in for product demonstrations. Ultimately, Questica won the RFP process because when compared to other software solutions, Questica offers superior workflow management system (budget requests and versions) and a robust dashboard management system.
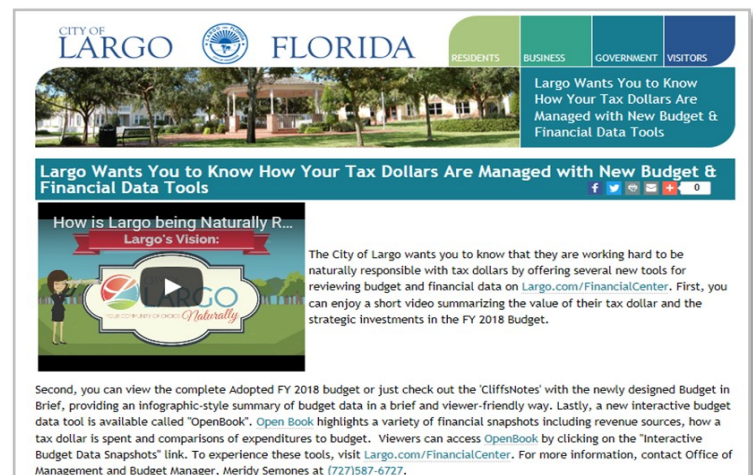

The City implemented Questica Budget in 2016 and are delighted with the improvements to their budgeting process.

> "The data (in OpenBook) that provides the most detailed information comes from Questica Budget. OpenBook is a straightforward way to graphically display our budget dollars, while only conveying information that the public wanted."
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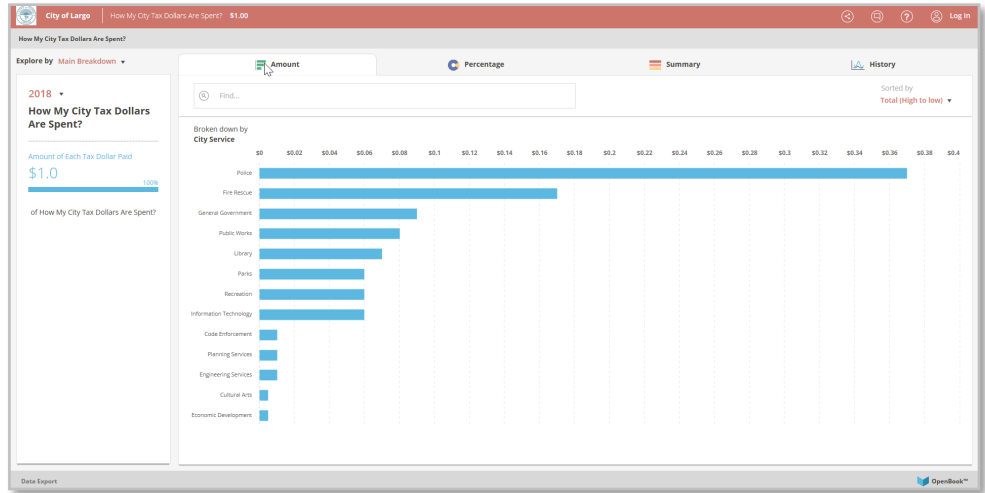> Meridy Semones, Manager, Office of Management & Budget

In 2017, the City also implemented Questica OpenBook, a data visualization tool to evolve how budget information was being shared both internally and externally. OpenBook is an avenue that allows the City of Largo to offer more transparent communication of their budget with its citizens, and it provides coherent data that the city commissioners want, which helps promote more public outreach and engagement.

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The City has an [OpenBook dashboard](#) on their city's [financial center webpage](#), where visitors can click a link to explore how the city spends their budget in different departments — it's an easy and user-friendly way to portray their annual budget spending. Budgeting data can now be accessed anytime on the website, in a more interesting and interactive way than just relying on spreadsheets or static PDFs to share information. The City also embedded OpenBook visualizations within Questica Budget dashboards for managers and department heads to provide up-to-date and accessible snapshots, allowing for better tracking of the budget throughout the year.
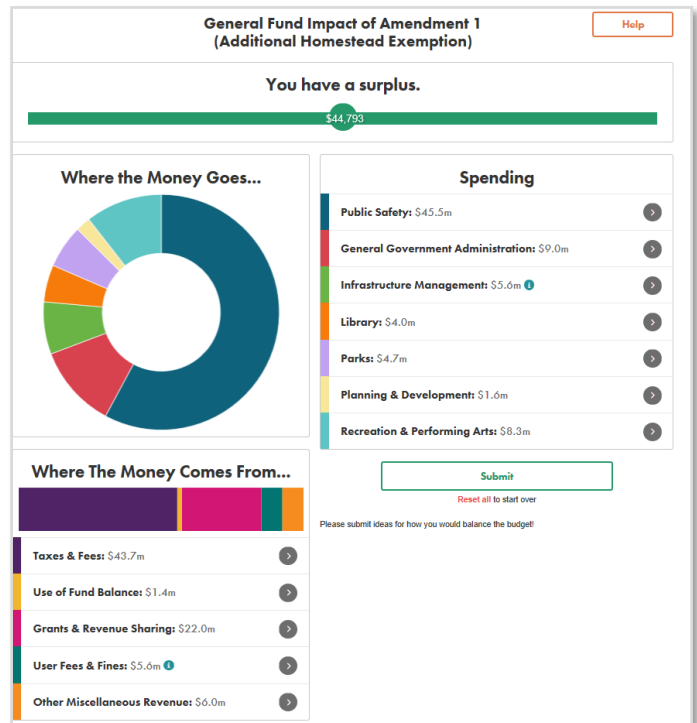
Business Benefits

Transparency

Questica empowered the City to use budget information as a management tool by providing a robust dashboard feature through OpenBook, which is fully customizable to meet the needs of its various internal and external stakeholders.

These features have provided the City of Largo with a more efficient decision-making process and it has minimized the errors resulting from redundant data entry. Data updated in Questica Budget seamlessly updates in OpenBook as well, so there is no need to enter the same information twice.

With OpenBook, users can build rich interactive visualizations of their budget data to create beautiful, informative at-a-glance displays. The City can show charts to monitor budget development or track spending in a single department or across the entire organization. OpenBook dashboards are built using a simple drag-and-drop interface and can be private, shared between groups, or made available to all users, which allows the City of Largo to control how accessible data is to different stakeholders.

Now citizens can explore the budget and other financial data online in various graphical formats selected by the user with OpenBook. Online tools such as OpenBook and the [City of Largo's short video on their budgeting goals](#), has improved how the public and city officials can access information on how tax dollars are being managed in a more transparent and collaborative way. As part of an ongoing campaign to encourage more public engagement, the City will continue to use OpenBook as an outlet to translate information about the budget that is much more relatable to the public. As well, the City launched an interactive Budget [Simulator by Balancing Act](#) (a Questica Partner).

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The City also using [OpenBook Project Explorer for capital budgets visualization](#) to provide detailed information about their capital infrastructure projects.
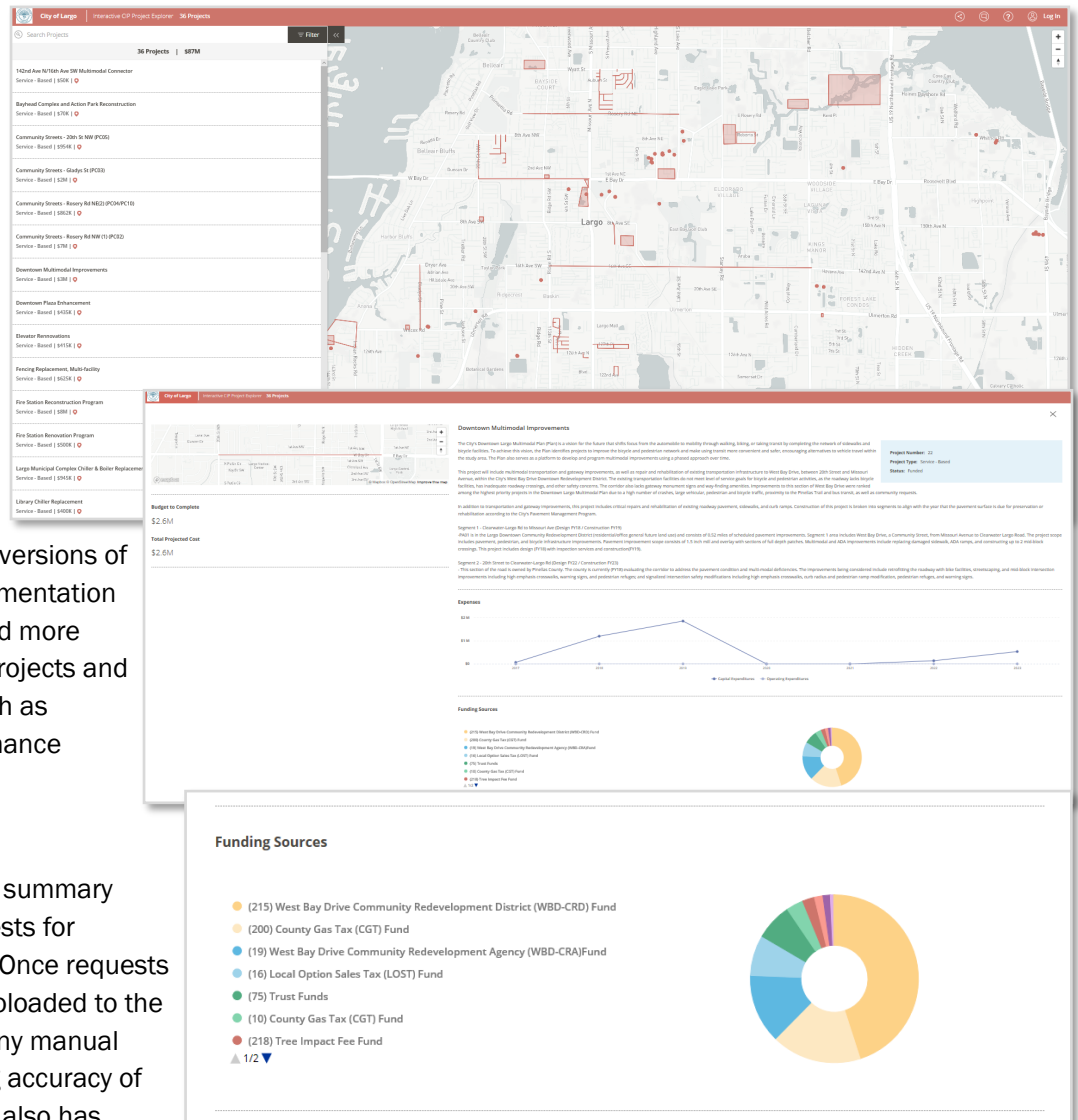
Time Savings

The reporting system in Questica Budget became the primary tool for expenditure tracking, analysis, reporting, as well as the annual budget preparation and capital infrastructure program (CIP).

Electronic budget request submittal and subsequent automated approval effectively streamlined the budget preparation process, and it also allows the staff to easily add requests to various versions of the budget. Through the implementation of Questica, the City has gained more time to work on higher value projects and tasks throughout the year, such as strategic planning and performance measures.

Collaborative Budgeting

Questica Budget can generate summary reports of the submitted requests for management's consideration. Once requests are approved, they can be autoloaded to the budget, without the need for any manual entry in the system, improving accuracy of financial projections. Questica also has dynamic budget versioning functionality that allows management and the City Commission to see proposed changes to the budget, and the subsequent outcomes of those changes in real time without requiring manual export of data into separate spreadsheets.

"The budget document is a once a year thing – it's not something that people outside the organization would look at throughout the year. Aside from the people that are very engaged with the budgeting process, the budget book is such a foreign thing to the average resident. Graphs, charts, and information they can explore online is much more relatable in OpenBook."

Will Payne, Management Analyst, City of Largo

Thanks to more efficient budgeting and increasing transparency, the City of Largo is brilliant.

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