OPENGOV

Culpeper County, Virginia, Streamlines Budget Process and Increases Efficiency with OpenGov Budget Builder™

AGENCY TYPE
County Government

POPULATION
49,000

ANNUAL BUDGET
$165 Million

The County of Culpeper, Virginia is a growing community that has experienced a housing boom and manufacturing expansion in recent years. A strong focus on economic development serves a mixed community, with residents populating rural areas as well as the northern part of the County, which lies within commuting distance of the Washington, D.C. metropolitan area.

Operating with a 30-year-old antiquated Enterprise Resource Planning (ERP) system, County finance staff considered going out to bid on a new system. When circumstances prevented that, they needed a way to extend the life of the existing system and sought a technology solution that would help the organization streamline its budgeting process.

Department Heads Enjoy Budget Builder's Ease of Use

In its search for budgeting software that would improve planning, County Finance Director Valerie Lamb was immediately enthusiastic about OpenGov Budget Builder's possibilities and how it could improve outcomes in Culpeper. The team was surprised by how quickly OpenGov's Customer Success team deployed the platform. Implementation happened, "rather rapidly," Lamb recalled with a chuckle. Lamb's experience was a highlight of the County's early partnership with OpenGov, particularly as the Customer Success team provided immediate responsiveness – an important factor during budget season when time is of the essence. "Everyone I worked with was quick to follow through and make sure

Culpeper County streamlined its budgeting process by budgeting in the cloud using OpenGov Budget Builder. (Source: Doug Kerr / Flickr CC)

the platform was operating the way I needed it to work, and not some county halfway across the country," she said.

Feedback from department heads was also positive. They especially valued and benefitted from the platform's easy-to-use interface. "They didn't like our existing system, but they muddled along with it because they had to," Lamb explained. "Using OpenGov to enter in their budget numbers proved much less painful and less stressful for them."

While Culpeper's zero-based budgeting approach always necessitated department head engagement, Lamb noted a heightened ownership and awareness with OpenGov. Even when managers are not involved in detailed back-and-forth decisions, they can easily see what changes users make throughout the process, and by whom. Lamb also saw value in the flexibility afforded to department heads in how they

entered and justified their requests through the line-item fields and the narrative section. "Having multiple ways for departments to justify their lines was helpful because different people like different formats, and that comfort enables them to have more of a stake in their budgets and what they present," Lamb said.

Budget Builder Extends Life of ERP, While Streamlining Process

To date, the organization's biggest benefit of using Budget Builder has been its creation of one central and safe budget repository. The platform established a flexible planning and reporting layer that sits atop its existing ERP system, enabling Culpeper to continue using it but also take advantage of the data it contained for a better budget process.

"The one thing that I liked best about OpenGov is the fact that when the department heads log in and enter their information, it's a central storage point for everything," Lamb said. From internal coordination to external submissions, such as for GFOA review, Lamb had been sending the budget out on a CD or building a separate shared drive location for access. "There were always differences in versions of Word or Excel, problems with people not being able to open or view files, or any number of issues always going on," she said.

Additionally, the existing ERP's interface was a green screen with no point-and-click functionality. "It was just really cumbersome, and it's a daunting task to go in there and enter information," Lamb said. OpenGov provided an intuitive web-based system that Culpeper's staff could use easily to drill down and attach relevant items, streamlining their work and saving time previously spent chasing down versions and following long e-mail threads. "With OpenGov, they could just store everything in one place and then I could download it and put it where I needed it," Lamb said. "The possibility of receiving or updating a wrong version, or not getting something to the right person was eliminated."

Budget Builder Saves Finance Director's Time

Culpeper's first budget cycle using Budget Builder was noticeably smoother than previous ones despite the fact that it was a reassessment year for the County and policy decisions were more complex. "The whole process just flowed a lot easier," Lamb said. In particular, Lamb was able to use Budget Builder's automatic calculations

By using OpenGov as a flexible planning and reporting layer, the County extended the life of its antiquated 30-year-old ERP system. (Source: Bob Wilcox / Flickr CC)

Because Budget Builder automatically reflects changes to the budget, Culpeper County's budget team no longer relies on error-prone spreadsheets for manual updates. (Source: U.S. Library of Congress)

and updates to eliminate much of her manual changes. "It saved a lot of time and headaches for me because when I would change something, it would automatically update everything that was linked, and I didn't have to manually rekey or recreate things," she said.

The County's outdated ERP system led to Lamb and her staff spending significant time copying and pasting to avoid the tedious re-keying. Unfortunately, this increased the potential for errors because it was too easy to paste something on the wrong spreadsheet line and not notice.

"Having three years of history, the current year's information, and the proposed information all right there in OpenGov just made life a lot easier," she explained. That Budget Builder also automatically put the budget information in a more visual format also saved Lamb time preparing reports and workbooks for her Board. She reallocated time she previously spent formatting and arranging information to more strategic budget analysis or other priorities. The result was not only a more efficient budgeting process but a more effective one as well.

RESULTS

✓ **Streamlined Budget Process.** One central repository for all stakeholders kept everyone in sync with real-time information, eliminated long e-mail threads, and reduced errors version conflicts.

✓ **Extended Life of ERP.** The OpenGov Smart Government Cloud™ established a planning and reporting layer over Culpeper County's 30-year-old ERP system, enabling the team to keep it intact while leveraging its data for analysis.

✓ **Saved Valuable Time.** Automatic updates eliminated time spent re-keying and recreating spreadsheets from scratch.