



Montgomery County, Pennsylvania Uses OpenGov to Uncover Insights and Engage Public



AGENCY TYPE
County

POPULATION
815,000

ANNUAL BUDGET
\$371 Million

Overcoming Budgetary Challenges

Montgomery County, Pennsylvania's 815,000 residents form a vibrant and diverse community. Densely populated urban areas blend with farms and open land to power an economy dependent on health sciences, pharmaceuticals, manufacturing, IT, agriculture, and retail. The county's government serves both exceptionally wealthy and impoverished areas.

Montgomery County's Chief Finance Officer, Uri Monson, joined Montgomery's staff in 2012 to help address the county's serious budgetary issues. Under previous officials, the county's reserves had dwindled from \$100 million to \$23 million, resulting in frequent annual operating deficits as high as \$27 million, increased borrowing, and rising debt service payments.

Despite its \$371 million budget, Montgomery County's annual budget document was a mere twelve pages long, with handwritten page

numbers and just two columns comparing previous fiscal year and current fiscal year figures. There were no actuals. The budget did not even account for all necessary expenses. Indeed, it once failed to budget staff for a new prison wing planned to open that fiscal year. When the budget did include line items for various expenses, the figures in the public version did not match those in the county's own accounting system.

Amid these shortcomings, the newly-elected commissioners directed the County's senior staff to develop a more structured budget and to present it in a transparent fashion. Montgomery County adopted a zero-based budget model, reduced its debt, and rebuilt its reserve. As the county's financial situation recovered, Monson and the commissioners looked for ways to increase internal understanding of resource allocation while also better engaging the public.

Consequently, in June 2014, Montgomery County purchased the OpenGov Smart

Government Platform to provide public administrators with actionable, data-driven insights into the budget process to improve its engagement with the public.

Undertaking Trend Analysis to Gain Insights

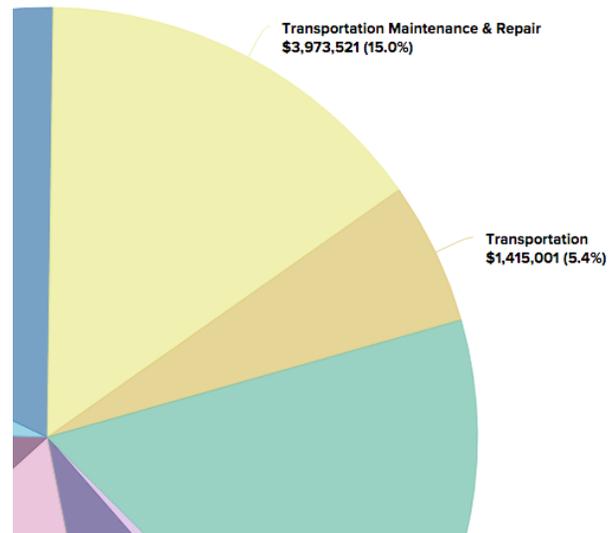
Monson and his team used OpenGov to uncover and identify trends over time. “We discovered a number of issues with OpenGov because in the past, we never looked at five- or six-year trends with this kind of detail,” he explained. OpenGov’s drill-down capabilities extended beyond departmental views. Monson also used the platform to view information by expense category, wages, benefits, or, “whatever other view we needed.” Multi-dimensional data visualization capabilities also enabled Monson to learn more from the data, as the illustrations told a story beyond raw numbers.

In another case, during this period, Montgomery County noticed its utility costs had fallen from \$6.6 million to less than \$4 million annually. Using OpenGov, Monson analyzed trends in utility expenditures to determine why costs were declining. By drilling into multi-year data, Monson determined that the decline was largely due to a combination of lower prices and reduced usage. These insights “inform planning discussions in a meaningful way,” he shared.

OpenGov’s ability to display data by expense types across departments gave Monson and his staff new insights into leave payouts, which he noted were a “huge cost issue for us.” For example, leave payouts increased dramatically with administration changes. These payouts can be quite expensive, so the ability to analyze

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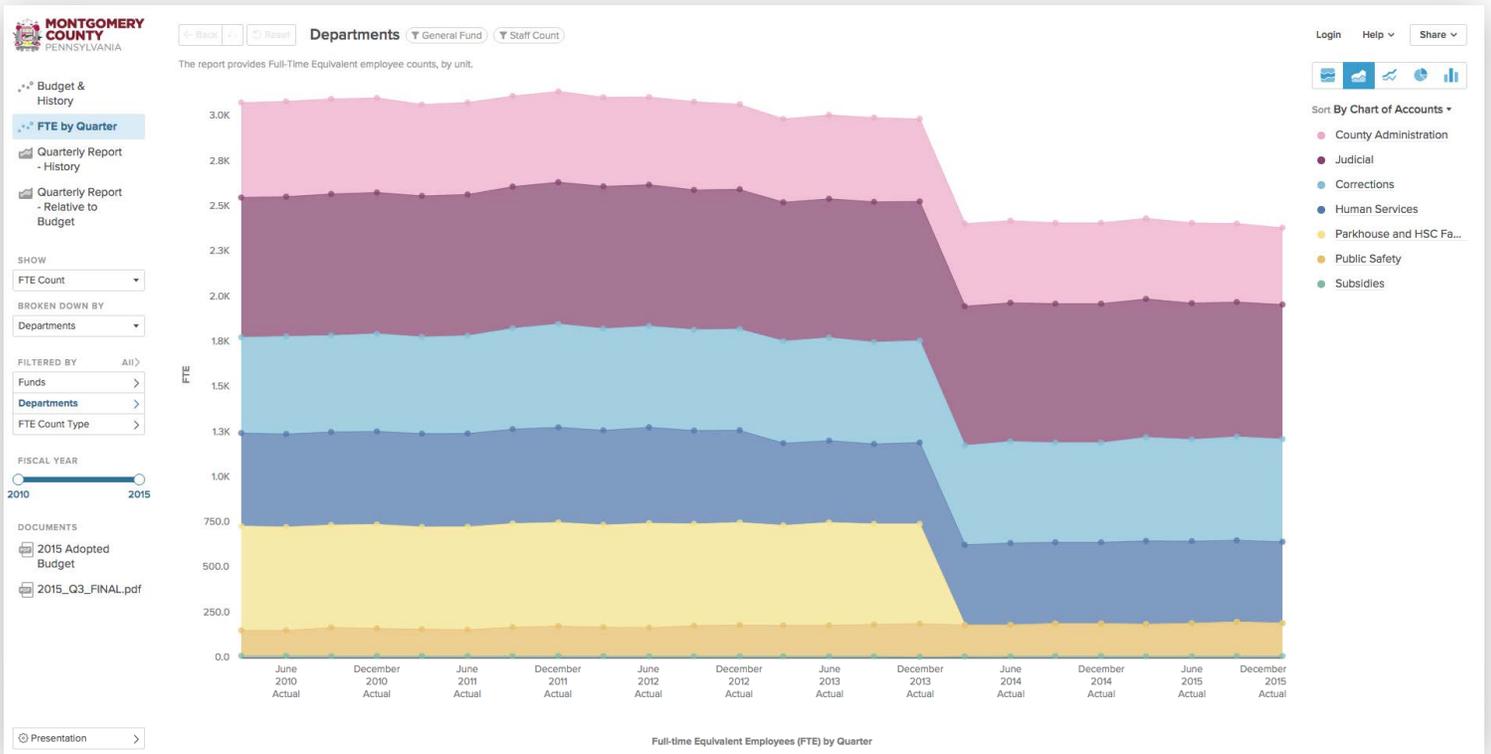
URI MONSON
CFO, Montgomery County, PA



Break down spending and revenue by category, then drill down in seconds, using OpenGov.

multi-year trends is critical. “It helps the budgeting process to be able to see those kind of trend lines in areas that you don’t necessarily examine, as there’s a tendency to look across departments and not hone in on expense type,” Monson explained.

Monson’s team also used OpenGov to track quarterly and annual Full Time Equivalent (FTE) trends by department and area over time. While this data helped enhance internal budgeting, it also better informed the public in key areas of interest like the popular increase in 911 operators. Monson noted, “A significant portion of government budgeting involves labor, and the ability to analyze FTE trends is helpful when



Visualize departmental changes in personnel counts through interactive charts that inform citizens and elected officials alike.

determining where to put your resources.” For example, OpenGov allows decision-makers like Monson to explore how FTE trends have changed relative to external contracting.

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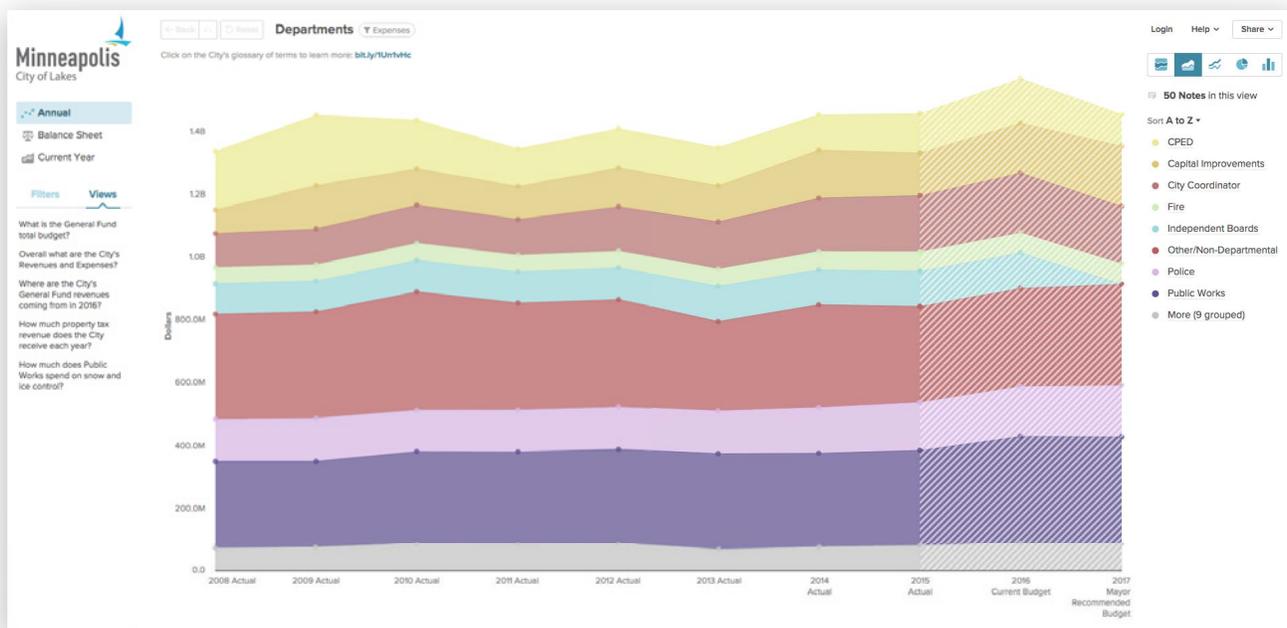
Informing Commissioners and Constituents

Six weeks after each quarter, Monson presents a quarterly report to the county commissioners that covers key ongoing financial and operational performance. He now uses the county’s OpenGov platform to tell the commissioners a story about the county’s performance. “I don’t even use my own presentation materials anymore,” he explained, “I just display OpenGov on the screen to buttress my discussion.”

In addition to the internal benefits, leveraging OpenGov also enabled Montgomery County to achieve greater transparency. After the platform’s implementation, Monson placed the county’s budget proposal, as well as five years of financial history, on the county’s OpenGov platform. After presenting the budget in a commissioner’s meeting, Monson was able to quickly display the budget “so the public had easy access to an accurate budget.”

OpenGov’s ability to create “saved views” provides new ways to educate and engage the public. If a project or issue generates strong public interest or common questions, staff can save specific views within the platform that help respond to the public’s questions and ensure accurate information is readily accessible.

Monson and his team has used saved views to illustrate the impact of new investments in roads, bridges, and public spaces on annual debt service. Similarly, as the county’s public employee benefit costs rise, a saved view communicates the associated impact to the public, commissioners, and the media alike.



Easily compare historical financial trends occurring at various levels of detail.

RESULTS

- ✓ **Unearthed Key Operational Insights.** OpenGov’s Smart Government Platform enabled Montgomery County’s leadership to uncover key trends in utilities, personnel, and leave payouts. The ability to view data by expense types and other dimensions led to valuable new insights.
- ✓ **Provided Dynamic Information on Demand.** Montgomery County’s Chief Finance Officer used OpenGov to inform elected officials. Using OpenGov reports during presentations allowed him to quickly answer questions in real-time.
- ✓ **Strengthened Public Engagement.** OpenGov allowed Montgomery County to better engage with the public by sharing relevant financial and non-financial data, as well as answering common questions with saved views.