For Winchester, Virginia, transparency was a first step toward strategic budgeting

State and local governments often struggle to align their investment of dollars and resources with their strategic priorities. A strategic plan rarely provides budget details at a line-item level that would allow internal stakeholders and the community to see exactly where funds are going. In addition, public entities may not have the transparency and reporting capabilities to communicate how well they're meeting goals from their strategic plan.

Some may view transparency as a check-the-box activity and doubt whether stakeholders and the public will take the time to understand the data. While data without context can be misunderstood or misconstrued, this skeptical perspective overlooks an important point: Transparency is as much about internal decision-making as it is about external communications. Without transparency in the form of internal reporting on progress toward priorities, departments cannot effectively assess how close they are to achieving strategic goals, adjust course as necessary, or communicate performance on priorities to the public.

The city of Winchester, Virginia, faced such challenges, which led its chief financial officer, Mary Blowe, to use OpenGov to strengthen the connection between strategic planning, budgeting, and reporting on strategic initiatives and to share performance on priorities easily on the city's public website.

"Several years ago, we began to see a change in what citizens want," Blowe says. "One of their expectations is transparency. Transparency is not just a buzzword. It's about integrity and trust in your government. OpenGov Cloud offered a lot of solutions that increased the transparency of our general ledger information, and we were able to better connect our strategy and our spending in an understandable way for stakeholders and our community."

A modern, cloud-based offering, the OpenGov solution runs on Amazon Web Services (AWS) and allows Blowe's team to present complex performance data and financial information in a simple, digital format. Using OpenGov, the team has moved the city's strategic plan online, which now serves as the system of record for tracking performance toward objectives for city council stakeholders and the community.

Telling the story

Winchester has approximately 28,000 residents, about 500 employees, and a budget slightly over $200 million. Blowe's team of seven acts as the fiscal agent for the court system, social services, the police department, and more. With OpenGov, her small finance team can effectively and accurately showcase performance on priorities with automatic daily data updates.

The power of illustration
The city's 2021-2026 online strategic plan lays out five goals: Working Winchester, Building Winchester, Strengthening Winchester, Moving Winchester, and Supporting Winchester.[1] Using OpenGov, the finance team visually communicates the plan via an easy-to-understand web page[2] that pulls data directly from a transparency portal. The plan lists the objectives and related actions for each goal and uses narrative text, dashboards, maps, photographs, graphics, and other components to illustrate how well the city is meeting its objectives.

"The objectives and performance measures are translated into bar charts or other visual options to graphically depict the story that you see online," Blowe says. "If you're talking about the additional linear feet of sidewalk concrete, for example, a nice picture of the city's recent sidewalk work gives people

a visual frame of reference. All the performance measures are in one place, and those stories are the way departments communicate internally, too."

Building trust
With details about goals, progress, and spending posted online, Blowe has noticed a shift in the public's interactions with government. "We don't have people coming into the budget meetings. It's not because they don't care. It's because they're comfortable with what we put out there. We don't get a lot of feedback, and that's a good thing because generally the feedback you get is about dissatisfaction," Blowe says.

Internal benefits
Internal departments gain insight from greater transparency, too. Users don't need a financial or IT background to explore and understand data. For example, if the police department wants a snapshot of overtime data, Blowe can share the details in a digestible and interactive report. In addition, an "open checkbook" feature[3] allows internal departments (and the public) to see how much the city has spent with a particular vendor over the years.

"We have purchasing thresholds, and one good way to utilize that system is to see how much we have spent collectively," Blowe says. "If the city has reached a threshold, we can inform procurement. Since the city charter allows for line-item transfers, we can also use the tool to identify and reallocate unused monies."

Budgeting and planning solution leads to success
Currently, the finance team is making the budgeting process more transparent by moving from a static PDF budget book and manual spreadsheet processes to a mobile-friendly, interactive budget book and budget planning software that enables the city to better track performance at the line-item level.

One of Winchester's goals for the new system is to add more narrative to budget submissions. For instance, if the finance team or another department wants an additional $10,000 for office supplies, OpenGov software provides an easy way to explain the reason for the request. With such features, the budgeting and planning solution fosters public trust by allowing the city to reveal budget details more dynamically and by giving community members an opportunity to provide feedback.

The solution will also save time. "The budget book is a giant story and is the largest document prepared by the city," Blowe says. "It's important to set it up properly. Based on my history with the strategic plan, it will take a little time to update the budget book once the story has been created, but it will be a huge time-saver moving forward."

Procurement rounds out the end-to-end solution
With OpenGov's Procurement Suite, Blowe aims to have all the city's vendors submit their bids electronically instead of on paper. Eventually, Blowe wants the purchase order system to communicate with other city systems so the finance team can more easily manage contracts and compliance.

"I wanted an all-in-one solution," Blowe says. "You should start at the top with your strategic plan, where the city council sets the goals. Then the budget should adhere to the goals. Then you do your procurement bids and you're in compliance. It all rolls downhill, and I want it to all tie together in one seamless product. That's why I've continued to purchase the OpenGov Suites."

Partnering for success and innovation
Ongoing support from the OpenGov team is a key factor in the city's success with the various solutions.

"A lot of their staff members are former government employees, so they understand our needs and our time and budget constraints," Blowe says.

OpenGov's customer success team also keeps Winchester's finance team informed about product enhancements, new ideas, and best practices so the city can maximize the value of its investment and continue to innovate.

"We're a small locality that does a lot, as our community demands and deserves," Blowe says. "I wanted something simple and effective, and we've managed to accomplish that with OpenGov."

This piece was developed and written by the Government Technology Content Studio, with information and input from AWS.

1 https://www.winchesterva.gov/sites/default/files/documents/government/strategic-plan/2021-sp-final-web.pdf
2 https://stories.opengov.com/winchesterva/published/5tReRWEBf
3 https://www.winchesterva.gov/finance/budget