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City of Port Coquitlam

Budget: $130 million

Citizens: 57,000

Employees: 400

Users: 30

Incorporated: 1913

Situation Analysis

The City of Port Coquitlam is not your typical Clarity Systems Fortune 1000 customer. Located just east of Vancouver, it is a thriving municipality with small town charm and big city connections. Since it became a city in 1914, Port Coquitlam has seen significant growth and is now home to more than 57,000 citizens. The City Council and its staff are responsible for implementing and maintaining the community's basic essential services including clean water, sanitary sewer disposal, roads, and fire and police protection as well as other services such as parks and recreational facilities.

Just like commercial enterprises, municipalities such as Port Coquitlam are accountable to its stakeholders; however it is the expectations of taxpayers and citizens instead of shareholders that must be met. Their success is not measured in the profit they make but in their ability to keep taxes down and to provide the needed services. As a local government, their initiatives, strategies, and financial data are publicly available. Their citizens are entitled by law to see how their tax dollars are spent by the City. When it came to choosing budgeting software, it was imperative that the City implemented a solution that would automate and integrate its budgeting, planning, and reporting functions to ensure greater accuracy in their numbers.

"Our financial data must be as accurate as possible," says Jason Rude, Budget Officer for the City of Port Coquitlam. "If we make a mistake on our numbers a tax increase would get passed down to the citizens and they obviously would not be too happy about that."

Port Coquitlam was using Excel to produce its budget. The numbers were then loaded into their ERP (Enterprise Resource Planning) system Cayenta. When it came time to produce the actuals, it took a lot of time to get the data out of Cayenta and into Excel where calculations of the variances would occur. The spreadsheets would then be sent to staff that would comment on them, provide projections, and send them back to the City where data was compiled manually and the results discussed in Council meetings.

"We had too many linked spreadsheets and large amounts of manual entries which were causing numerous technical problems and inaccuracies in our numbers," says Rude. "It became difficult to analyze how to best allocate our budget to our services. Creating the budget took a large amount of time, time which could have been better spent on analysis. We needed a solution that could provide accurate financial data without consuming all the time of our key staff."

Solution

Port Coquitlam was looking for a budgeting tool that was easy for users to learn and operate, and with the ability to create reports that fit with the City's current financial systems.

Rude went through an extensive research process and evaluated every software he could find which eventually amounted to almost 40 vendors. With the assistance of the City's Information Services Manager the list was narrowed down to 10 vendors, each of which demonstrated its solution.

"When working for the government there is that level of accountability," says Rude. "In order to get approval I had to go to the Finance committee which is a public committee that is accountable and open to the public. I wanted to confidently stand in front of this public committee and say 'I have looked for every possible solution and this is my recommended choice'."

That choice was Clarity 6. Using Clarity 6's Excel like web interface, the City's employees adapted quickly to the new budgeting system. Users appreciated the flexibility to build templates and reports that addressed their department's unique requirements.

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~ Jason Rude, Budget Officer - City of Port Coquitlam

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Larger software companies were considered but the solutions they offered could not be tailored to Port Coquitlam and their needs. "Bigger companies have standardized a lot of things and there are so many different parts that were disconnected rather then one unified platform," says Rude. "When you look at a local government, that does everything differently, that just won't work. Clarity Systems offered us a solution customized to our needs and fit our business perfectly."

Results

After implementing Clarity 6, Port Coquitlam has better visibility into their city's finances and gives their decision makers improved analytical insights. They are now able to make more informed decisions as to how to spend the city's budget in order to maximize benefits to its citizens. "Just like any services oriented business, we measure our success in results; the more efficient we run, the lower the tax rate," says Rude. "We are one of the few municipalities that are debt free and we have a history of having low tax increases. Clarity 6 has made us more efficient which has helped us to continue to keep the tax rate down."

Efficiency has certainly become Port Coquitlam's forte. With this new solution they save over 1000 hours annually; time that was once spent gathering and correcting data but is now used to conduct analysis and make decisions. The City projects that this tighter and more effective budgeting process and the ability to make better decisions will result in over $60,000 in savings annually for the City. "The ability to analyze how and why we spend and what that translates to makes a huge difference in the services we provide," says Rude.

Port Coquitlam has also made use of the Clarity 6 Visualizer feature to create reports that present information graphically. Senior Council Members and staff no longer have to dig through mounds of data to make a decision – the relevant numbers are now shown in an understandable and concise manner. These reports can be used in the council meetings to present real data that can be modeled to reflect the outcome of different plans of action.

"For the budget deliberation meetings we plan to have Clarity on the screen to see the effect of different scenarios," says Rude. "We will be able to say if we want to do X, it will result in a tax increase of Y or a cut back on Z. This way it makes the data real, we see the impact immediately, and we can collaborate and discuss in the meetings instead of distributing budgets through email and having days go by." City Council meetings will never be the same.

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Global / North American Headquarters

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Toronto, Ontario, Canada M2N 5Y7

Toll free: 1.877.410.5070
Phone: 1.416.250.5500
Fax: 1.416.250.5533
Email: info@claritysystems.com

International / European Headquarters

3000 Hillswood Drive, Hillswood Business Park
Chertsey, Surrey, UK KT16 0RS

Phone: +44 (0) 1932 895878
Fax: +44 (0) 1932 895289

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