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FINANCE

CLARK COUNTY, WASHINGTON BUDGET DEPARTMENT

Sharing Strategies for Working Together

BY KATIE LUDWIG

Clark County, with a population of nearly 500,000 people, is located in southwest Washington just across the Columbia River from Portland, Oregon. The county has approximately 1,700 full-time equivalent positions, and many employees, including those in the county's Budget Office, have been working remotely since March 2020 because of the COVID-19 pandemic.

Emily Zwetzig is Clark County's budget director. She started out with the county as a budget analyst and was promoted to her current position approximately three years ago. Before coming to the Budget Office, Emily worked in Clark County's District Court for a few years, and before that she worked for Clackamas County, Oregon, for more than ten years.

The Budget Office is made up of five full-time employees. Three of the current team members started in the latter half of 2021, as the Budget Office hasn't been immune to the increased staff turnover that many local governments are experiencing lately. The team acknowledges the challenges associated with working remotely but believes that their office's collaborative culture has positioned them for success. In a recent conversation, they spoke about the benefits of internal collaboration as well as collaboration with other departments throughout the county.

"You wouldn't think it when you think about finance, but relationships are probably the most important for what we do," said Emily.

"Building rapport with people is harder now that we're remote, but it can be done," said Lisa Boman, a financial

program manager II in the Budget Office. "We just have to get to know people and make that bond." Lisa has been with the county's Budget Office for nearly 25 years, starting shortly after it was created. She said she doesn't consider herself very good at public speaking, but a big part of creating a bond with people is stepping outside your comfort zone and "not being afraid to talk."

Lisa explained that her primary role is to administer and maintain Questica, the budget software system the county has implemented. She's also responsible for calculating and projecting costs associated with positions.

"Lisa has stepped in to be what we call our Questica administrator. She's the overarching expert of

ABOVE, FROM LEFT: Lisa Bowman, Lanea Van Sant, DeAnn Cordes, and Cherie Sabug

the whole entire system, but we realized that she was going to need some additional support,” explained Emily. To provide it, the Budget Office hired Cherie Sabug in September 2021. Cherie has been employed with Clark County since 2006. She’d had a financial role with the Public Works Department since 2007, and before that she worked in the Auditor’s Office Recording Department.

Emily cited the county’s Questica implementation in 2019 as a good example of successful collaboration. “It was a countywide effort. All departments not only implemented the system, but also tested it. That project required everybody,” she said.

Lisa noted that while the county was implementing Questica, it was also rolling out a new chart of accounts as part of implementing a new enterprise resource planning (ERP) system, Workday. “We wanted to take budgeting up a level so that we wouldn’t be budgeting down to an activity level,” she said. “That was a big change, and we had to coordinate with the Auditor’s Office and the Treasurer’s Office to get all the actuals cross-walked between the systems and get everything where it needed to be.”

With this success under its belt, the county plans to implement the Questica capital planning module in 2022. Cherie is the lead for this next phase of implementation, which includes not only software but also developing a countywide capital improvement planning and budgeting process.

“We’re implementing the software piece, but we’re also creating a capital advisory committee for the planning process and financial policies for how we want to do it, not just how we want to budget for it,” Emily said. She added that she hopes the collaboration on the capital planning side will also help the county down the road as it

explores additional innovations for the budget process. “We’ve done a lot of work on program budgeting. We’ve got it to a certain stage, but it’s kind of been on hold for a couple of years just because of all these other initiatives,” she said. “That’s going to require a lot of collaboration internally with our budget group to review the data we already have, reaching out to departments to get that updated, and then working with the council and the county manager to figure out how they want to use that as part of the budgeting process.”

Lanea Van Sant is one of the newest Budget Office team members, having taken the position of senior budget and policy analyst in November 2021. Before that, Lanea worked in accounts payable in the county’s Public Health Department, and before that, with the State of Washington. Lanea now supports various departments with expense and revenue monitoring. She is also the lead within the Budget Office for forecasting and monitoring the county’s mental health sales tax.

“As a new person coming in, collaboration has been so key for me to be able to learn what we do at the Budget Office and how we communicate with the departments that we support,” Lanea said. “We collaborate daily, using various communication tools and working together, side-by-side, to really learn the job. Collaboration is really important to me because I would not know where to start.”

DeAnn Cordes also started as senior budget and policy analyst in November 2021. Before joining the team, DeAnn worked for a fire department in the State of Oregon. Like Lanea, she also provides budget support to various departments, and she is also the lead for forecasting and monitoring property taxes, sales taxes, and real estate excise taxes.

DeAnn said that collaboration has been essential as she gets acclimated to her new position. She relies on her Budget Office colleagues, as well as those in other departments, when she has questions, and she expressed appreciation for their patience. “Making sure I’m understanding what I’m reading or seeing or hearing is very important,” she said.

Emily explained that transparency and collaboration are priorities for her office and are essential for developing the county budget every year. “We facilitate this massive process that is extremely critical for the county, but we don’t create it, and we’re not the experts in what happens with each department’s operations,” she said. Emily serves on an internal finance team with the finance director, the deputy county treasurer, and the county manager. Since the onset of the COVID-19 pandemic, this group has been meeting weekly to discuss emerging issues and strategies to address the county’s financial concerns.

“We try to meet regularly with departments, and we try to provide overall training and guidance, so they know what they need to do to use the tools and participate,” Emily said. In the past couple of years, they have offered budget training sessions throughout the year, one during the kick-off and one around mid-year. She then explained that they are changing their approach.

“I found that departments are not getting what they need out of those big, overarching training sessions. They really need more one-on-one,” she said. “Starting with this year’s budget process, we’re going to intersect with them before all the major deadlines, and there will be a week’s worth of meetings with all these departments and offices to talk about the process and deadlines to bring them up to speed.” In addition, Emily said that they plan to include the county’s American Rescue Plan Act funding coordinator in these trainings “so she can impart the



Emily Zwetzig



Lisa Bowman



Lanea Van Sant



DeAnn Cordes



Cherie Sabug

specifics for the budgeting process for that particular fund.”

Emily acknowledged that too much communication can sometimes be overwhelming, and that her office is committed to finding the right amount of support and training to provide each department, recognizing that some might need more or less assistance.

Lisa agreed that this more personalized approach to departmental training and support makes sense. “Especially with COVID, we’re seeing a lot of people leaving employment and retiring, so we are seeing new people who have not been around for a long time—and then Questica is still new, although it’s very user-friendly,” she said.

Lanea pointed out that the Budget Office provides transparency by listing each team member’s role and responsibilities, and contact information, on the county’s intranet site, along with the estimated budget development calendar for the upcoming year. She thinks that sharing this information helps encourage more communication and collaboration.

“Budget is our lifeblood. This is what we do every single day,” said Emily. She recognizes that isn’t the case for her colleagues in other departments and understands that they are busy running their operations and providing critical services for the county’s residents. So, she sees it as her team’s job to work with their colleagues outside the Budget Office to bring the financial perspective to conversations and get them to take a break from running things to focus on the budget. “It’s hard. Everybody’s really busy, more so now than ever,” she said.

The Budget Office also has a goal of documenting its processes and procedures, which is part of a larger county initiative to document all financial policies and processes, Emily said. She added that documenting policies and procedures also helps support collaboration, as it provides background information that staff members can review to become more familiar with a particular topic.

Emily has found that regular team check-ins have been very helpful while working remotely. “I didn’t do it quite as frequently at the beginning of the pandemic. I intended to, but it got really, really hectic, and I found that without

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those check-ins, the team didn’t do as well. It feels like there’s much better collaboration and the team does better if you could just say, ‘Hey, how was your weekend?’ and just connect.”

“It’s been challenging, but I think we’re doing really well. I think we’ve proven we can deliver our core responsibilities remotely, which I didn’t think we could do at the beginning,” Emily added.

“I find that there are fewer distractions when I’m working in the office,” Lisa said. “I just find that I’m able to see a project through when I’m in the office, where at home I find myself getting to do one thing, and then I’m off to another thing, and I have trouble just staying on task, getting through one thing completely. Being in the office just helps with that.” As a result, she tries to go into the office at least once a week.

Lanea explained that her entire career with the county has been remote. She started in June 2020, working for the Public Health Department, and was initially told that she’d be working remotely for about a month—but it has been nearly two years so far. “I think that collaboration and communication are even more important when you’re working remotely, especially for team morale,” she said. “I know we’re all super busy, but everyone is very easy to reach, even though we are remote.”

DeAnn said there have been some pros and cons for her when it comes

to working remotely. On the plus side, checking in regularly with her colleagues has helped keep everyone connected. The onboarding resource that Emily put together for Lanea and her was also very helpful. “I took it as a to-do list,” she said. “It really helped keep me focused on tasks and assignments. It was nice because if I couldn’t get ahold of someone, I knew what to do. I didn’t need someone to lead me by the hand.”

“A huge con for me, though, is that I love that face-to-face conversation. I just really enjoy getting to know people,” DeAnn said. The team does interact regularly using Microsoft Teams, she said, but these online interactions aren’t quite the same as being there in person. She is optimistic that once employees are back in the office regularly, she will get to know people better.

Emily said the cloud-based project management software Asana has been helpful to promote and encourage collaboration while working remotely. The Questica project manager first introduced the Budget Office to this software during their implementation and they have continued using it for other projects. “Asana has been a real lifesaver,” she said. “We can track all our projects, deadlines, and deliverables, and everybody is there working on things together. It’s a way to communicate what’s happening, what’s checked off, and what comes next.” Emily added that the Budget Office has also used some of the Asana forms functionality to collect information from departments.

For finance or budget teams looking to build a more collaborative culture, Lanea suggested adopting a validation process like what the Clark County Budget Office team has in place. When a team member completes a report or document, before it is finalized and sent out, other Budget Office team members review that work product. “We’re having a second—and sometimes a third—set of eyes look at our work, and we’re communicating with each other about that work before it leaves our team.” This practice keeps her informed about what her team members are working on and reinforces a culture of collaboration. ■

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