



Doing Things Differently

Don't Be Afraid

Presenters

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City of Mattoon

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DuPage County Health Department



GMIS ILLINOIS

Government Management Information Sciences

The Voice of State and Local Government Information Management

Disclaimer

- ▶ The work here is that of Dave Buwick and Brian Johanpeter personally.
- ▶ The views or opinions expressed do not reflect that of our employers.

Objectives

► Purpose

Explore ways technology can help you do things differently, not for the sake of change, but for the sake of improving efficiencies and the organization as a whole.

Agenda

- ▶ Discuss Perspective
- ▶ Explore Change
- ▶ Avoid Landmines
- ▶ Review Examples

Our Perspective

- ▶ Historical
 - ▶ IT grew out of Finance
- ▶ Current
 - ▶ Missions of Service
 - ▶ See entire organization

Our Perspective

- ▶ Future
 - ▶ Holistic View
 - ▶ Outsourcing

What is Change?

- ▶ **“alter, vary, modify mean to make or become different. change implies making either an essential difference,”**

www.merriam-webster.com/dictionary/change

- ▶ **Actions:**

- Cause
- Exchange
- Become

Attributes of Change?

- ▶ Inevitable: “The only thing you can be sure of in life is change. ” – Mike Ditka
- ▶ Embrace it, be proactive
- ▶ Don't wait for it to find you

What Causes Change?

- ▶ Problems / Crises / Emergencies
- ▶ Economic Factors
- ▶ Board / Council Initiatives
- ▶ New Leadership
- ▶ Reorganization
- ▶ Technology

Why Do We Resist Change?

- ▶ Physiological Fight or Flight
- ▶ Fear of Failure
- ▶ Difficult / Too Much Work
- ▶ Polarizing: Fear of People Not Liking Us
- ▶ We Don't Want to Change
- ▶ High Risk: Hero or Goat

Change Management Tools

- ▶ Change Management Plan - PMI
- ▶ Strategic Planning
- ▶ Quality / Performance Management
- ▶ Networking / Trends
- ▶ Focus Groups / End-user Groups
- ▶ Resources – Printed Materials
- ▶ Inter-Agency Collaboration

Approach



Proposing Change Vs. Implementing Change

Landmines



Landmines

- ▶ Lack of Leadership Support / Sponsorship
 - Project Charter
- ▶ Don't Involve Stakeholders
 - Need Collaboration
- ▶ No Project Management Methodology
 - No Change Management Plan
- ▶ Rely Too Much on Logic / ROI
- ▶ Lack of End-User Involvement- All Levels
- ▶ Rush to Implement

Real-World Examples

- ▶ Success: eAgenda Project
- ▶ Unsuccessful: Quality Management
Balanced Scorecard
- ▶ TBD: Utility Billing Project
- ▶ Success: Open Checkbook

eAgenda Project

- ▶ Leadership Support and Sponsorship
- ▶ Project Management Methodology
- ▶ Dedicated Project Manager
- ▶ All Level Stakeholder Involvement
- ▶ Patience
- ▶ Vision Statement
- ▶ Hand-Picked Project Team
- ▶ Marketing Plan



@Agenda

Quality Management Balanced Scorecard

- ▶ Overly Complex
- ▶ No Complete Leadership Buy-In
- ▶ No Clear Benefits / ROI
- ▶ Top Down – No Staff Buy-In
- ▶ Poor Communication
- ▶ No Change Management Plan
- ▶ Link to Merit

Utility Billing Project

- ▶ Utility Billing Printing
 - ▶ Problem
 - ▶ Solution
 - ▶ Status

Open Checkbook

- ▶ Legacy Finance & Payroll Systems
Reporting Difficult
- ▶ Data Warehouse
Reporting Still Difficult
- ▶ Third-party Tool - Socrata
Granular Reporting
Online and On-demand

Before – Internal View

```
GL010101          CITY OF URBANA
                  General Ledger Search/Select
Vendor: 00000 or partial name: _____
Account: 000 0 0000 - 0061 Account Search(X): 
Journal id: _____ Starting Journal Sequence: 000000
Bank Code: 00 Check: 00000000 Check Search(X): 
Fiscal Year: 2015 OR Starting date: 07 / 01 / 2014 Ending date: 06 / 30 / 2015

  Date   Account/Vendor   Check Description   Journal Seq   D/C   Amount
8/01/14 000 0 0000 0061 148562 JULY PAYPAL
          8885 FIRST NATIONAL BANK OMAHA      CHECKW 002482
8/01/14 000 0 0000 0061 148611
          12177 PROFOUND LOGIC SOFTWARE, INC CHECKW 002541
8/01/14 000 0 0000 0061 148613
          13737 SHI INTERNATIONAL CORP        CHECKW 002543
8/22/14 000 0 0000 0061 148867
          13737 SHI INTERNATIONAL CORP        CHECKW 004822
9/05/14 000 0 0000 0061 148964 PAYPAL
          8885 FIRST NATIONAL BANK OMAHA      CHECKW 006435
Bal Forward:                .00
This Period:                57,380.72 Per Budget:                .00
15 Total YTD:                57,380.72 15 YTD Budget:                .00 ENTER to search
                                      15 Tot Budget:                .00 CMD 3 to return
```

Before – External Report

GL40A RUN DATE 4/17/15 GENERAL LEDGER DETAIL TRIAL BALANCE FOR PERIOD 7/01/2014 TO 4/17/2015 PAGE 85
 PERIOD 7/01/2014 TO 4/17/2015 CITY OF URBANA
 000 GENERAL FUND-ASSETS & LIABILITIES

GL ACCT NO TRANS	CO DP MAJ MIN DATE	SEQNO VENDOR	DESCRIPTION	CURRENT MTD	DEBIT AMT	CREDIT AMT	CURRENT YTD
000 0 0000-0060			PREPAID CITY COPIER (CONTINUED)				
	1/23/15	22338 74400	ROGARDS		394.90		
	1/23/15	22340 74400	ROGARDS		78.98		
	1/30/15	23179 06060	WATTS COPY SYSTEMS IN		14.19		
			JAN	967.03 *			6,903.74
	2/13/15	24771 74400	ROGARDS		236.94		
	2/13/15	24772 74400	ROGARDS		473.88		
	2/20/15	25350 13980	CANON FINANCIAL SERVI1ST/2ND FLR 02/15		208.00		
	2/20/15	25351 13953	CANON SOLUTIONS AMERI1ST/2ND FLR 01/15		111.00		
	2/20/15	25436 74400	ROGARDS		315.92		
	2/27/15	26432 06060	WATTS COPY SYSTEMS IN		10.69		
			FEB	1,356.43 *			8,260.17
	3/20/15	28764 13980	CANON FINANCIAL SERVI1ST/2ND FLR 3/15		208.00		
	3/20/15	28765 13953	CANON SOLUTIONS AMERI1ST/2ND FLR 2/15		111.00		
	3/27/15	29920 74400	ROGARDS COPY PAPER		394.90		
			MAR	713.90 *			8,974.07
	4/17/15	32020 13953	CANON SOLUTIONS AMERIMAINTE MAR 2015		111.00		
	4/17/15	32065 74400	ROGARDS		315.92		
			APR	426.92 *	9,511.99	111.00 *	9,400.99 *
000 0 0000-0061			PREPAID COMPUTER				.00
	8/01/14	02482 08885	FIRST NATIONAL BANK OJULY PAYPAL		5.00		
	8/01/14	02541 12177	PROFOUND LOGIC SOFTWA		911.66		
	8/01/14	02543 13737	SHI INTERNATIONAL COR		1,025.00		
	8/22/14	04822 13737	SHI INTERNATIONAL COR		265.00		
			AUG	2,206.66 *			2,206.66
	9/05/14	06435 08885	FIRST NATIONAL BANK OPAYPAL		5.00		
	9/12/14	07746 06526	COMMUNICATIONS REVOLVJULY 2014		328.33		
	9/19/14	08395 13737	SHI INTERNATIONAL COR		54.00		
			SEP	387.33 *			2,593.99
	10/03/14	10028 08885	FIRST NATIONAL BANK OCOMP SUPPLIES		247.27		
	10/03/14	10038 08885	FIRST NATIONAL BANK OPAYPAL		5.00		
	10/03/14	10145 14754	ITV-3 - CU		15,870.05		
	10/03/14	10176 13737	SHI INTERNATIONAL COR		1,158.00		
	10/03/14	10177 13737	SHI INTERNATIONAL COR		225.00		
	10/03/14	10180 13737	SHI INTERNATIONAL COR		2,077.92		
	10/09/14	11034 06526	COMMUNICATIONS REVOLVAUG 2014		328.33		

After (Summary view of a Vendor)

Urbana Open Expenditures

Open Expenditures

Entire Ledger
\$52.2 million - 100.0% of all

Vendor
ROGARDS
\$31,081 - 0.1% of all

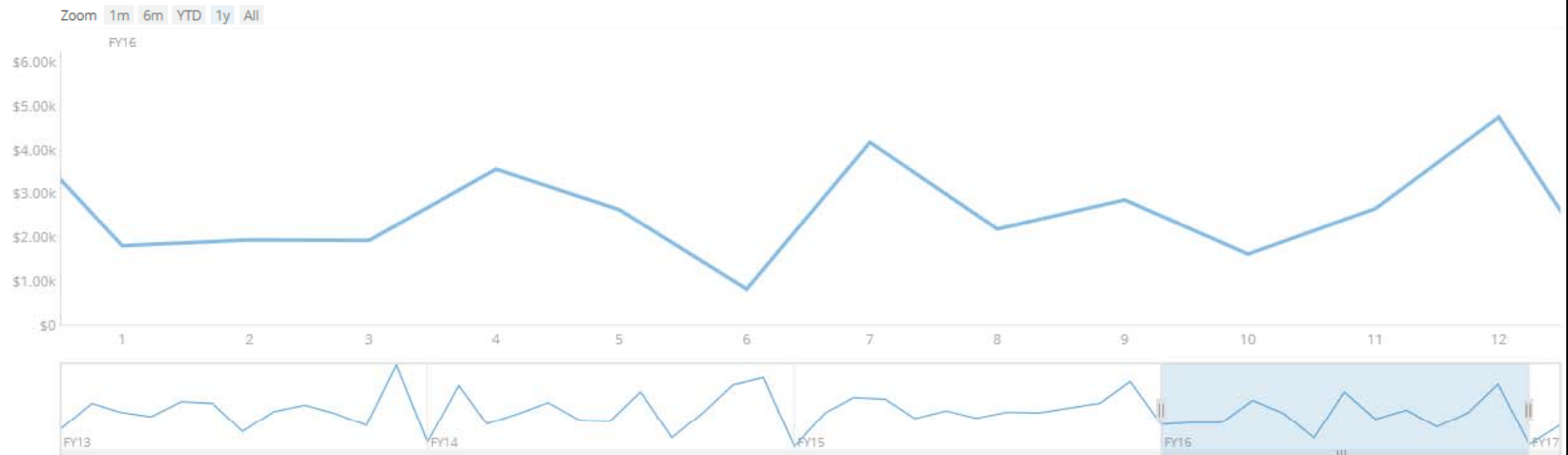
\$31,081 ROGARDS 2016 ▾

[Spending Summary](#) [Checkbook](#)

ROGARDS

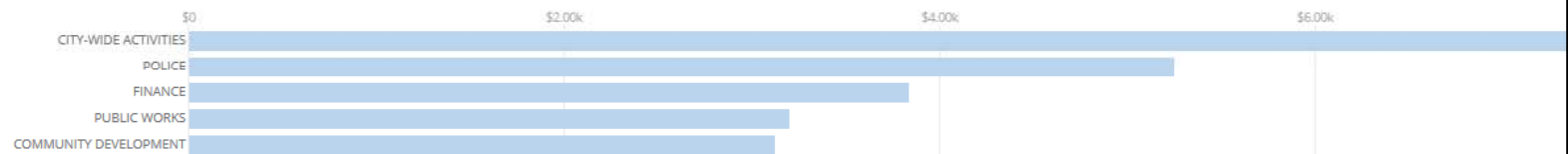
[← Back](#)

Payments Over Time



Payment BreakDown 2016

By Department ▾



Showing 1 - 5 of 8

After (Checkbook view)

Urbana Open Expenditures									
City of Urbana Urbana Open Data Tutorial f t Search									
Open Expenditures									
Entire Ledger \$52.2 million - 100.0% of all									
Vendor ROGARDS \$31,081 - 0.1% of all									
\$31,081 ROGARDS 2016									
Spending Summary Checkbook									
ROGARDS									
Checkbook									
								Total \$31,080.92	Transactions 252
Download									
Back									
Fiscal Period	Vendor	Expense Category	Description	Fund	Date	Amount			
12	ROGARDS	OFFICE SUPPLIES	OFFICE SUPPLIES	045 - POLICE (GENERAL FUND)	Jun 30, 2016	\$253.59			
12	ROGARDS	OFFICE SUPPLIES	OFFICE SUPPLIES	060 - PUBLIC WORKS (GENERAL FUND)	Jun 30, 2016	\$379.30			
12	ROGARDS	PREPAID CITY COPIER	COPY PAPER	000 - GENERAL FUND-ASSETS & LIABILITIES	Jun 30, 2016	\$628.88			
12	ROGARDS	PREPAID CITY COPIER	COPY PAPER PD 07/08/16	000 - GENERAL FUND-ASSETS & LIABILITIES	Jun 30, 2016	\$145.96			
12	ROGARDS	OFFICE SUPPLIES	PAD,STAPLER,COVER PD 07/08/16	025 - FINANCE (GENERAL FUND)	Jun 30, 2016	\$135.15			
12	ROGARDS	OFFICE SUPPLIES	OFFICE SUPPLIES PD 07/08/16	050 - FIRE RESCUE (GENERAL FUND)	Jun 30, 2016	\$741.99			
12	ROGARDS	OFFICE SUPPLIES	TIMER PD 07/08/16	035 - CITY CLERK (GENERAL FUND)	Jun 30, 2016	\$35.99			
12	ROGARDS	OFFICE SUPPLIES	PEN,POST-IT PD 07/08/16	025 - FINANCE (GENERAL FUND)	Jun 30, 2016	\$14.58			
12	ROGARDS	OFFICE SUPPLIES	PD 07/08/16	020 - EXECUTIVE (GENERAL FUND)	Jun 30, 2016	\$24.85			
12	ROGARDS	OFFICE SUPPLIES	BINDER,MARKER,INK PD 07/08/16	025 - FINANCE (GENERAL FUND)	Jun 30, 2016	\$54.96			
12	ROGARDS	PREPAID COMPUTER	PAPER PD 07/08/16	000 - GENERAL FUND-ASSETS & LIABILITIES	Jun 30, 2016	\$591.17			
12	ROGARDS	OFFICE SUPPLIES	LABELS BAT POST IT PD 07/08/16	035 - CITY CLERK (GENERAL FUND)	Jun 30, 2016	\$77.61			
12	ROGARDS	OFFICE SUPPLIES	OFFICE SUPPLIES PD 07/29/16	090 - COMMUNITY DEVELOPMENT SERVICES (GENERAL FUND)	Jun 30, 2016	\$718.95			
12	ROGARDS	OFFICE SUPPLIES	OFFICE SUPPLIES PD 07/29/16	090 - COMMUNITY DEVELOPMENT SERVICES (GENERAL FUND)	Jun 30, 2016	\$69.07			
12	ROGARDS	OFFICE SUPPLIES	N/A	020 - EXECUTIVE (GENERAL FUND)	Jun 24, 2016	\$93.93			
12	ROGARDS	OFFICE SUPPLIES	OFFICE SUPPLIES	050 - FIRE RESCUE (GENERAL FUND)	Jun 24, 2016	\$115.07			
12	ROGARDS	OFFICE SUPPLIES	FILE POCKET, TAPE	025 - FINANCE (GENERAL FUND)	Jun 10, 2016	\$46.97			
12	ROGARDS	PREPAID CITY COPIER	PAPER	000 - GENERAL FUND-ASSETS & LIABILITIES	Jun 10, 2016	\$437.88			
12	ROGARDS	OFFICE SUPPLIES	2 COLOR INK/PAD	025 - FINANCE (GENERAL FUND)	Jun 10, 2016	\$7.60			

Open Checkbook

► Demonstration

<http://bit.ly/2aZ6j0B>

Doing IT Differently

- ▶ Data Cubes in Excel
- ▶ “Open/Shut” Book
- ▶ Multi-Agency Collaboration
- ▶ Audience Participation

Review

- ▶ Discuss – Perspective
All data and \$ flow through IT and Finance
- ▶ Explore - Change
- ▶ Avoid - Landmines
- ▶ Review - Examples

References

- ▶ Change Intelligence, Barbara Trautlein, PHD
- ▶ Project Management International

Questions



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