



SUBMISSION FORM

All submission forms must include the following information. Separate submission forms must be turned in for each eligible program. **Deadline: July 1, 2022.** Please include this submission form with the electronic entry. If you do not receive an email confirming receipt of your entry within 3 days of submission, please contact [Gage Harter](#).

PROGRAM INFORMATION

County: James City County

Program Title: Peninsula Financial System Users Group

Program Category: Regional Collaboration

CONTACT INFORMATION

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SIGNATURE OF COUNTY ADMINISTRATOR OR DEPUTY/ASSISTANT COUNTY ADMINISTRATOR

Name: Scott Stevens

Title: County Administrator

Signature: 



Executive Summary

Following the implementation of a new financial software system in April 2021, James City County's Department of Financial and Management Services (FMS) recognized the need for new processes and innovations to optimize the capabilities of the system. James City County had used its prior financial software for over twenty years, and the differences between the former system and the new system were significant. FMS staff dedicated years to configuring the new system as well as training end users in other departments; however, challenges still arose that the software vendor could not resolve. In an effort to find solutions, James City County reached out to neighboring localities that utilize the same financial software.

Initially, these conversations took place in isolation, with the Purchasing, Accounting, or Budget divisions of FMS contacting their counterparts in one or more of the other jurisdictions as needed. During weekly meetings regarding the new system, the FMS management team noticed the benefits of working through software issues with other localities and decided to develop a broader, problem-solving initiative. James City County began a dialogue with York County, the Cities of Williamsburg and Newport News, and the Williamsburg-James City County School Division to determine topics that could be addressed and individuals who should be involved. In the fall of 2021, the Peninsula Financial System Users Group (the Group) was established. Representatives from the participating entities now gather at least quarterly to discuss issues they have encountered with the system, brainstorm on best practices, and present procedures that have worked within their governments. Through regional collaboration, the Peninsula Financial System Users Group offers a forum for sharing ideas and developing innovative solutions. In addition, the network that has formed among the participants provides a valuable resource for addressing numerous other situations beyond the Group's original purpose.



The Challenge

After implementing a new financial software system, James City County approached the software vendor as staff encountered issues or areas where results were not meeting expectations. Responses from the vendor, though, were either not applicable given the configuration developed, or they were untimely, with weeks going by before feedback was received. The FMS team worked with James City County's Department of Information Resources Management to develop internal solutions, but they still faced limitations with the software. Specific issues included the inability to generate certain reports, concerns regarding disbursement processes, and the need to develop efficient procedures that would meet internal control requirements without being overly burdensome for users.

The various divisions of FMS reached out to other localities using the same software to seek answers or ideas as each challenge arose. While this provided assistance for immediate concerns, James City County recognized that all neighboring localities using the system could benefit if these conversations took place on a larger scale.

The Solution

In fall of 2021, the Director of FMS contacted her counterparts in the Finance Departments of York County, the Cities of Williamsburg and Newport News, and the Williamsburg-James City County School Division to establish a Peninsula Financial System Users Group. Working in partnership with these governments, James City County hoped to find solutions to shared challenges.

Initial discussions of the Group involved which individuals from the entities should participate and what issues should be addressed. Staff members from Purchasing, Accounting, Budget, and Information Technology (IT) divisions across the participating localities volunteered



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to join this initiative and offer their insights. Given that the pandemic was still ongoing and the number of individuals attending, the Peninsula Financial System Users Group held its first meeting virtually. Members noted that they might be using different versions of the software and that they might have various configurations, but they still found common ground. In two hours, the Group covered introductions, software versions, procurement challenges, payment processing, and other topics, and participants looked forward to the next discussion.

The Cost

Organizing the Peninsula Financial System Users Group did not require a funding source; instead, the primary cost of this Group is time. Staff members dedicate their time to scheduling the meetings, preparing topics and related materials, and carrying out the discussions with the other participants. Minimal costs have been incurred for the virtual meeting software, but this was not a new expenditure to James City County. In the future, there may be travel costs if this Group moves to an in-person format, but the participating governments' current budgets are anticipated to be able to cover these amounts. Given the efficiencies gained by users of the system by being able to share ideas and different approaches to solve our challenges, this minimal cost has been more than offset by saved staff time.

The Staffing

Participants in the Peninsula Financial System Users Group serve in various roles across multiple departments. The localities and school division have directors, analysts, specialists, and other staff from their finance and IT divisions in attendance during the meetings. This range of experience allows for broad insight into issues—from practical applications to overarching principles. The collaboration both within and among the individual governments encourages brainstorming and new approaches to challenges. In addition, the Group has evolved into a



network of professionals that can reach out to one another not just regarding their common financial software, but also when faced with larger issues.

The Results

Meetings are now held at least once per quarter, with topics decided in advance and applicable staff invited to attend. At the January 2022 meeting, Accounting and IT staff members discussed a glitch in the system related to federal tax forms due at the end of the month. The localities presented their current processes and the backup plans they had in place to ensure deadlines were met. The issue was resolved prior to the due date, and the Group's discussion provided staff with support and confidence in handling the matter.

James City County and the other members of the Group also used the meetings as a platform to present their procedures for handling certain tasks. In areas where a government showed innovation or efficiency, materials were shared and instructions distributed. During software configuration, FMS spent time developing James City County's employee expense reimbursement process within the financial software to correspond to its policies. This process was shared with the Group, and several participants expressed interest in the procedure. A few of the localities maintained a paper form-based process for expense reimbursements, and they wanted to know more about how the capabilities of the system could produce more efficient results. While the software vendor may have been able to help these governments establish a new process, starting from scratch with the vendor involves considerable time and costs. Seeing James City County's process provides them with a framework to use to minimize the cost of developing this procedure for themselves.

Despite the time and effort involved in organizing and conducting the meetings of the Peninsula Financial System Users Group, the benefits have outweighed the costs. The alternative



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would be to wait for the software vendor to provide costly or inapplicable responses. In addition, each government would be facing those costs on its own. With the Peninsula Financial System Users Group, the participating localities and school division can share resources and ideas that are relevant to Virginia local governments.

Brief Overview

James City County's Department of Financial and Management Services (FMS) developed the Peninsula Financial System Users Group (the Group) in an effort to optimize the use of its new financial software and address issues encountered following the implementation of the system. When the software vendor was unable to provide meaningful responses, James City County looked to neighboring jurisdictions for solutions. What began as occasional, one-on-one discussions grew into a much broader-reaching conversation.

In fall of 2021, the Director of FMS reached out to staff across various departments in York County, the Cities of Williamsburg and Newport News, and the Williamsburg-James City County School Division to form the Peninsula Financial System Users Group. Questions and concerns related to the financial software have been addressed during the Group's quarterly meetings, and the attendees have found a platform for developing solutions. A network has been established through the collaboration of this Group, giving participants a resource to utilize both related to the software and other matters relevant to individuals serving in their roles across local governments. Meetings have occurred during the spring of 2022, and participants look forward to discussing further innovations at the next meeting.