

EUNAVERSE

Transparency in a Digital Age

Budget Book Studio Workshop

Cecilia McCorkell, Euna Budget Professional, Principal Consultant
Lana Whittaker, Euna Budget Professional, Senior Product Manager



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01. Purpose of the Budget Book

02. Common Challenges with Creating a Book

03. Additional Challenges with Print Only Books

04. How Budget Book Studio Stands Out

05. Demo

06. Q&A

Why Do We Create and Publish Budget Books

- Demonstrates a Financial and Strategic Roadmap
- Legal Requirement
- Allows for Accountability
- Communication Tool

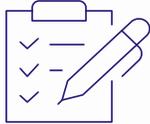
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Poll Question

What is your biggest challenge when creating your Budget Book?

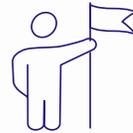


Common Challenges when Building a Budget Book



Cumbersome to Prepare

Depending on which tool(s) you use, coordinating with multiple users is difficult.



Difficult to Update

Financial data evolves, which means updates are almost a certainty. Updating can be painful, and inaccuracies can occur.



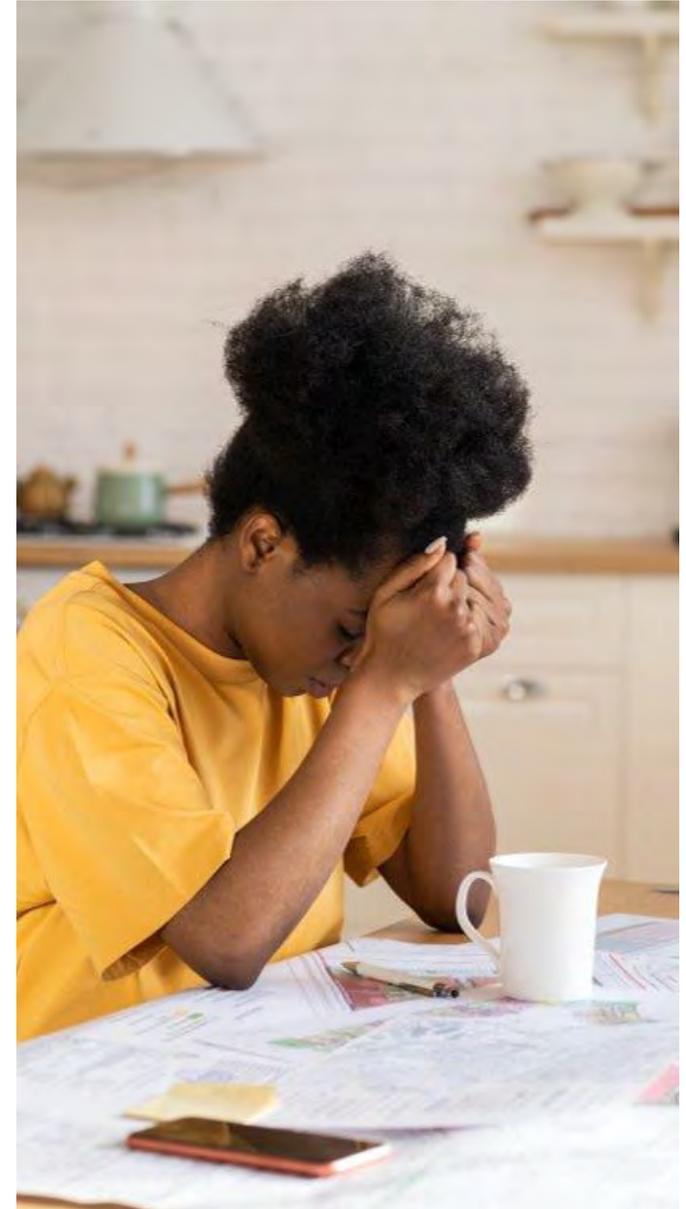
Time-Consuming

The process of formatting, consolidating data, reviewing a PDF document is lengthy.

GFOA Distinguished Budget Award

Applying for the GFOA Distinguished Budget Award can add another layer of difficulty.

- When to review your book content to ensure the Budget Book meets all criteria
- How to incorporate feedback from previous submission
- Is the person responsible for populating the application the same person developing the content?



Even More Challenges with Print Only



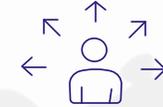
Static Document

Modern readers expect being able to search for specific items quickly and interact with charts when additional details are desired. None of this is possible using a PDF.



Accessibility Issues

PDFs generally don't meet accessibility standards. Budget Books should be created for everyone in your community.



Sharing isn't Easy

Sure, you can attach a PDF to an email, but what your community really wants to do is share a section on social media or send a specific table with a friend.

Is This Really Transparent?



Advantages of an Online Budget Book

Ease of Use

Allows stakeholders and the public to access budget information from any location and at any time, facilitating broader reach and engagement.

Real-Time Updates

Keeps the budget book up-to-date with the latest information, reducing errors and ensuring all stakeholders have the most current data.

Interactive Features

Includes elements like clickable charts, expandable sections, and search functions, making the budget book more engaging and easier to navigate.

Increased Transparency

Improves transparency by making detailed budget information readily available to the public, thus promoting accountability.

Accessible

Should meet accessibility standards so everyone in your community can access the budget book.

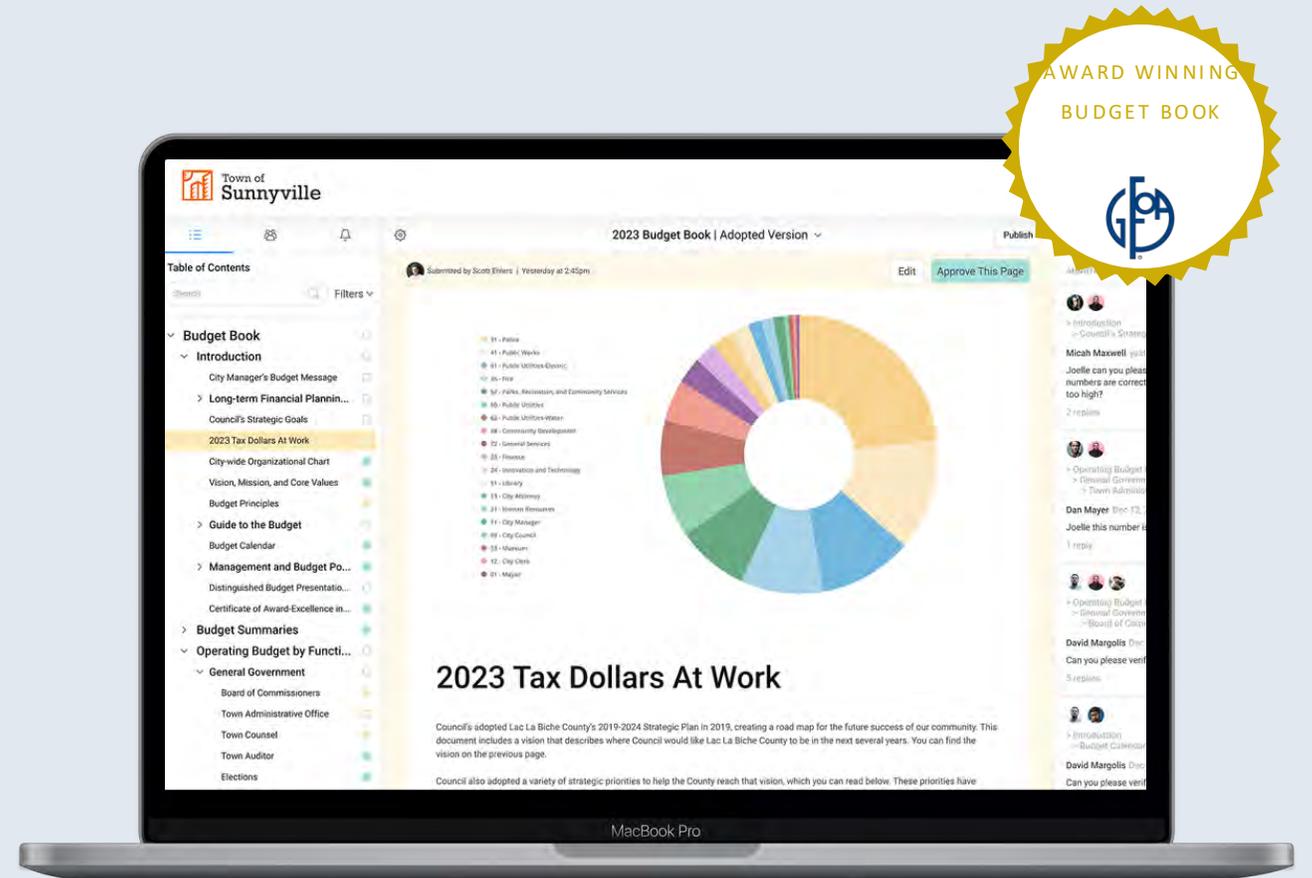
Can Still Be Printed

We get it, sometimes you still need to print your budget book. Not to worry, a good online budget book tool will allow you to export to PDF when needed.

Budget Book Studio

An intuitive online editor that enables your team to create and publish online budget books with ease.

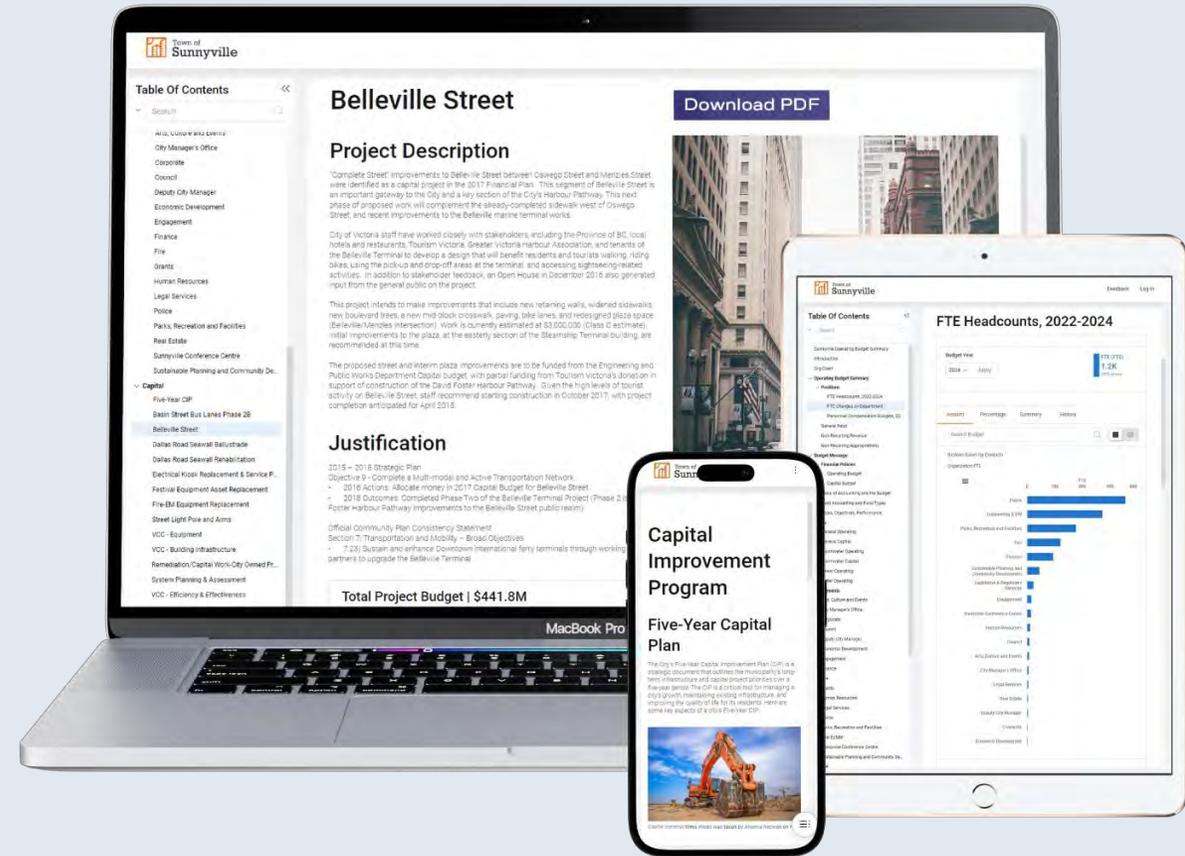
- No design or publishing experience needed.
- Update the budget book directly from your budget solution with the click of a button.
- Contribute to one cloud-based document using collaborative workflows.
- Start with a GFOA integrated checklist.
- Best in-class accessibility support .
- Export to PDF and print.



Access and Share the Budget Book Your Way

Whether in print, online, on mobile, or on a tablet. This flexibility ensures that everyone in the community can easily access and understand budget allocations, helping to clarify government spending and foster greater civic engagement.

- Navigate the budget book with ease
- Share the entire book or specific sections by email or social media
- Adheres to accessibility standards
- Generate PDF books instantly



Collaborate Across Teams and Departments

Leverage custom workflows and annotation tools to streamline collaboration between an unlimited number of team members throughout every stage of the book from submission to approval.

- Add notes, to-do items, and use @-mentions to notify contributors
- Move pages through a customized and controlled publishing workflow
- Assign pages and sections to team members

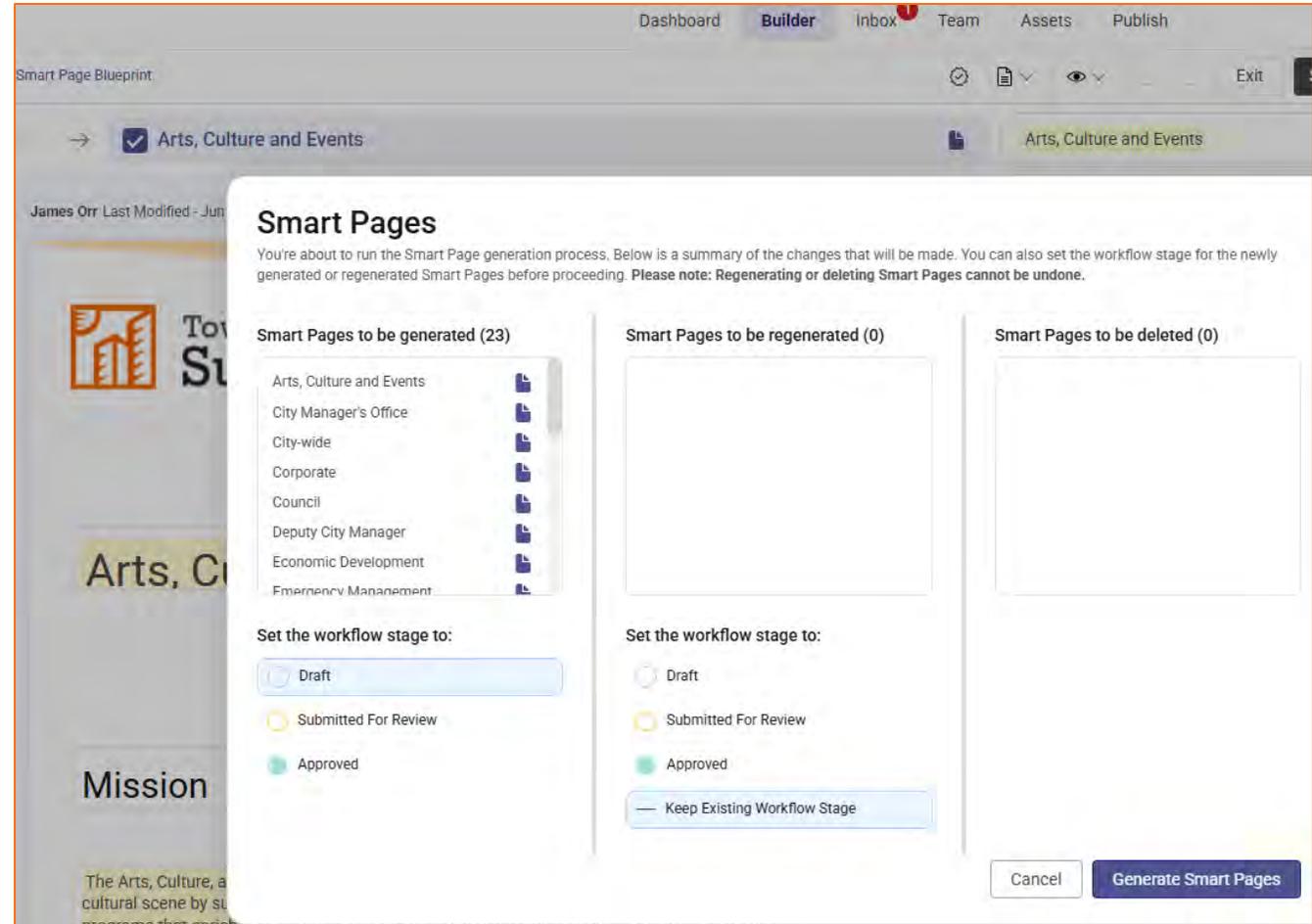
The screenshot displays the 'Sunnysville Budget Book Studio' interface. The main content area shows a document titled 'Changes in Positions' with a paragraph of text. Below the text is a section titled 'FTE Headcounts, 2022-2024' which includes a bar chart showing FTE headcounts by division for the year 2024. The chart shows a total of 1.2K FTE, with a 13% increase from 2023. The divisions and their approximate FTE values are: Police (250), Engineering & PW (180), Parks, Recreation and Facilities (150), Fire (120), Finance (100), Sustainable Planning and Community Development (80), Legislative & Regulatory Services (50), Engagement (30), and Sunnysville Conference Centre (20).

A comment overlay is visible on the right side of the document, showing a conversation between James Orr and Sandra DeAngelo. James Orr's comment asks: 'Does this paragraph reflect the more recent changes in Finance and HR?' Sandra DeAngelo's reply states: 'I met with Kelly and we brought in the latest info.' The comment interface includes a 'Reply' button, a 'Resolve' button, and a 'Delete' button.

Save Time with Automation

Accelerate budget book creation by minimizing manual processes and auto-generating content such as department pages, fund summaries, and capital project sheets.

- Increase data accuracy by minimizing human error through automation
- Reduce time spent on manual tasks and focus more on strategic initiatives



Efficient Development and Updates

Integrates directly with Euna Budget to automate data entry, allowing budget books to begin development before budgets are finalized, with the ability to make updates once your book has been published – a game changer!

- Build spreadsheets with synchronized data from the centralized solution
- Refresh datasets to simultaneously update all the data presentations in your book
- Track when updates were made and its collaborators

The screenshot displays the Euna Budget interface. On the left, a table lists budget books with columns for Date Created, Date Refreshed, Status, and Actions. The table contains 18 rows of data. On the right, a detailed view of a budget book is shown, including its title, creator information, and action buttons.

Date Created	Date Refreshed	Status	Actions
Sep 29, 2023	Apr 29, 2024	Sync	⋮
Sep 29, 2023	Mar 21, 2024	Sync	⋮
y@gmail.c...	Sep 26, 2023	Sync	⋮
y@gmail.c...	Sep 26, 2023	Sync	⋮
y@gmail.c...	Sep 29, 2023	Upload	⋮
y@gmail.c...	Sep 26, 2023	Sync	⋮
y@gmail.c...	Sep 29, 2023	Upload	⋮
y@gmail.c...	Sep 26, 2023	Sync	⋮
pencty@g...	Sep 27, 2023	Sync	⋮
Sep 29, 2023	-	Sync	⋮
Sep 29, 2023	Sep 29, 2023	Sync	⋮
Sep 29, 2023	Sep 29, 2023	Sync	⋮
Sep 29, 2023	Sep 29, 2023	Sync	⋮
y@gmail.c...	Sep 27, 2023	Sync	⋮
y@gmail.c...	Sep 27, 2023	Sync	⋮
y@gmail.c...	Sep 26, 2023	Sync	⋮
Sep 29, 2023	-	Sync	⋮

Budget Book - Sewer Operating Expenditures
Used By: 0 Visualizations
Created By: Cecilia Mct
Created On: Sep 29, 23
Actions: Edit, View, Refresh Data

Budget Book - Stormwater Capital Revenues
Used By: 0 Visualizations
Created By: Cecilia Mct
Created On: Sep 29, 23
Actions: Download, Delete

Budget Book - Stormwater Capital Expenditures
Used By: 0 Visualizations
Created By: Cecilia McCorkell
Created On: Sep 29, 23
Actions: ⋮

Budget Book - Stormwater Operating Expenditures
Used By: 0 Visualizations
Created By: Cecilia McCorkell
Created On: Sep 29, 23
Actions: ⋮

Create Award-Winning Budget Books

Create a budget book that meets the GFOA Distinguished Budget Presentation Award criteria. Our tool ensures your budget is clear, and structured for excellence, positioning your agency for recognition and public confidence.

- Start with a template that adheres to GFOA best practices
- Stay on track with a GFOA checklist
- Generate PDFs instantly, then submit your application to the award!

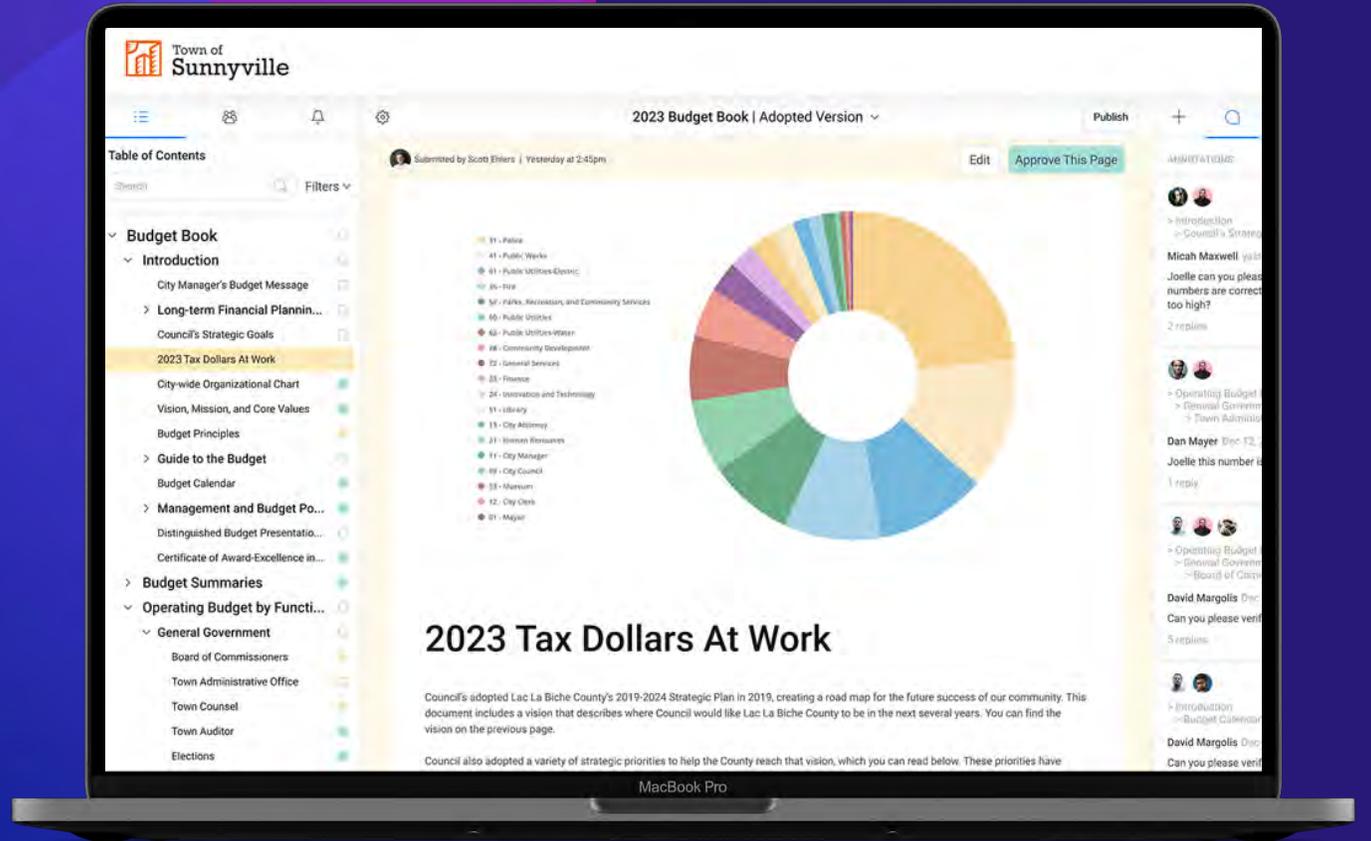
The screenshot displays a budget book interface for the Town of Sunnyville. The main content area shows a section titled "Non-Recurring Revenue" with a table and a pie chart. The pie chart is broken down by description, with a legend indicating: Royal BC Museum (blue), Broad Street (red), and Oak Bay Kleanex (green). A checklist overlay is visible on the right side of the screen, titled "Budget Overview | #C2 (Mandatory)". The checklist contains two items, both marked with a green checkmark:

1. Is an overview contained in the budget message/transmittal letter, executive summary, or in a separate budget-in-brief?
The Operating Budget Summary provides the required content.
Buttons: Operating Budget Summary, + This Page
2. Is summary information on significant budgetary items conveyed in an easy to consume format?
Our pages dedicated to one-time income sources and the main financial summary present
Buttons: General Fund, Non-Recurring Revenue

Below the second item, a fourth item is partially visible: "4. Is a summary of changes presented between the proposed to a...". A "+ This Page" button is also visible below this item.

DEMO

[Home](#) | [OpenBook](#)



Questions?

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Thank you!

Let's reach for the stars!

