

GRAVITY

CASE STUDY

City of San Marcos Modernizes Budget Production and Eliminates Overtime with Gravity



THE CHALLENGE

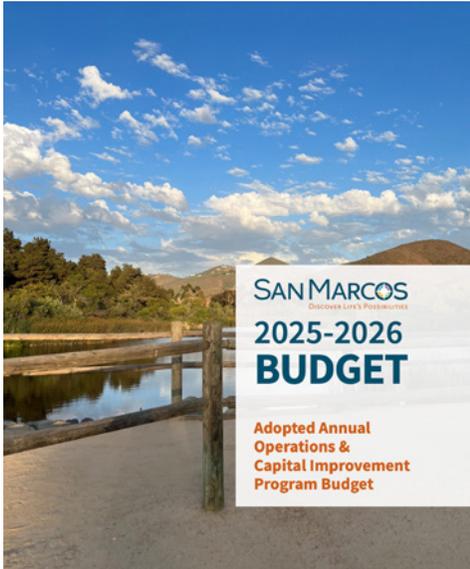
The City of San Marcos, California's budget process was mired in outdated technology. Their annual budget book depended entirely on Excel spreadsheets and physical printing—a cumbersome approach that created data validation risks and required three months of exhausting work. The team regularly endured budget crunch and 12-hour days just to get the budget published on time, with file management issues creating redundant versions and additional work.

As Janet Brotherton, Budget & Analysis Manager, explained: *"It was stuck in the*

past. We knew what we were doing was archaic."

THE SOLUTION

Approximately 4.5 years ago, San Marcos selected Gravity's budget book solution. The implementation centered on recreating their existing Excel structure within Gravity's platform—a strategic choice driven City leadership who preferred functional upgrades without major visual shifts. The Gravity team worked directly from San Marcos's Excel files to ensure smooth adoption without major visual shifts in order to ensure continuity of budget document for public use.



THE RESULTS

The impact was substantial: greater accuracy, significant time recovery, and reduced stress. The most dramatic improvement? Gravity eliminated the need for the budget team to work overtime hours just to complete the budget book on time. Their 3-4 person budget book team now maintains standard 8-hour schedules during budget season—recovering hundreds of hours annually. File management problems disappeared, replaced by a centralized system ensuring coordination is effortless and formula accuracy is built-in. San Marcos is also a GFOA award winner for financial reporting, reflecting their commitment to excellence.

WHY SAN MARCOS CHOSE GRAVITY



Contemporary tools without disruption maintaining familiar layouts while upgrading underlying systems



Automatic data integrity eliminating formula errors and file confusion



Workload normalization ending days in favor of sustainable schedules



Workforce development offering modern technology that attracts skilled professionals

LOOKING AHEAD

San Marcos continues broadening their use of Gravity, currently pursuing API integration for automatic uploads and budget monitoring. *“People don’t feel like they are going to grow in systems that are stale,”* Brotherton noted. *“Gravity helps ensure that our team is high functioning.”*

“We went from a budget season defined by crunch, with overtime work needed just to meet our deadlines, to a much more manageable process that fits without our normal 8-hour day. That alone has been life-changing.”

– Janet Brotherton, Budget & Analysis Manager, City of San Marcos