



Building Safer, Smarter, & More Efficient Local Governments

Florida Public Sector Seminar

June 3, 2026

forv/s
mazars

Your Presenter



Karen Kurtin, CPA, CFE, CGFO

Director & National Practice Leader, Government Outsourced
Accounting Services

karen.kurtin@us.forvismazars.com

The Need for Smarter, Safer, & Efficient Governments

Demand for Transparency and Accountability

Citizens expect government to provide quick, transparent, and accountable services that meet modern standards.

Importance of Safety and Security

Protecting sensitive data and ensuring physical and cybersecurity is critical for trustworthy government.

Focus on Efficiency and Resource Management

Streamlining government processes reduces waste and improves resource allocation for better service delivery.

Leveraging Technology and Innovation

Using data-driven decision making and innovative practices modernizes operations and enhances public trust.



Why This Matters

Role of Finance Officers

Finance officers lead efforts in operational efficiency, financial protection, and data-driven decision making.

Presentation Objectives

Equip finance leaders with strategies to improve efficiency, data use, and cybersecurity measures.

Fostering Proactive Mindset

Encourage adoption of technology, process streamlining, and building resilient systems for future challenges.



Understanding the Current Landscape



Challenges in Local Government Finance



Workforce Shortages Impact

Many finance departments face workforce shortages, increasing workloads and operational strain.

Legacy Systems Challenges

Outdated legacy systems reduce efficiency and hinder adaptation to modern technology demands.

Compliance Complexity

Evolving regulations increase the administrative burden on local government finance departments.

Emerging Trends in Local Government Finance



Emerging Digital Trends

Digital transformation and data-driven governance enhance decision making and service delivery.

AI & Automation

Generative AI and predictive analytics are being used to automate, streamline and accelerate data analysis.

Citizen-Centric Service Models

Self-service portals and mobile payment operations are similar to private-sector services.

Importance of Cybersecurity

Cybersecurity is a critical risk requiring finance and IT collaboration to protect sensitive data.

Smarter Decision Making Through Data



Using Analytics & Dashboards to Improve Financial Outcomes



Predictive Analytics for Forecasting

Predictive analytics helps finance officers accurately forecast revenue and expenditures for better planning.

Real-Time Performance Dashboards

Dashboards provide real-time visibility into financial metrics, increasing transparency and accountability.

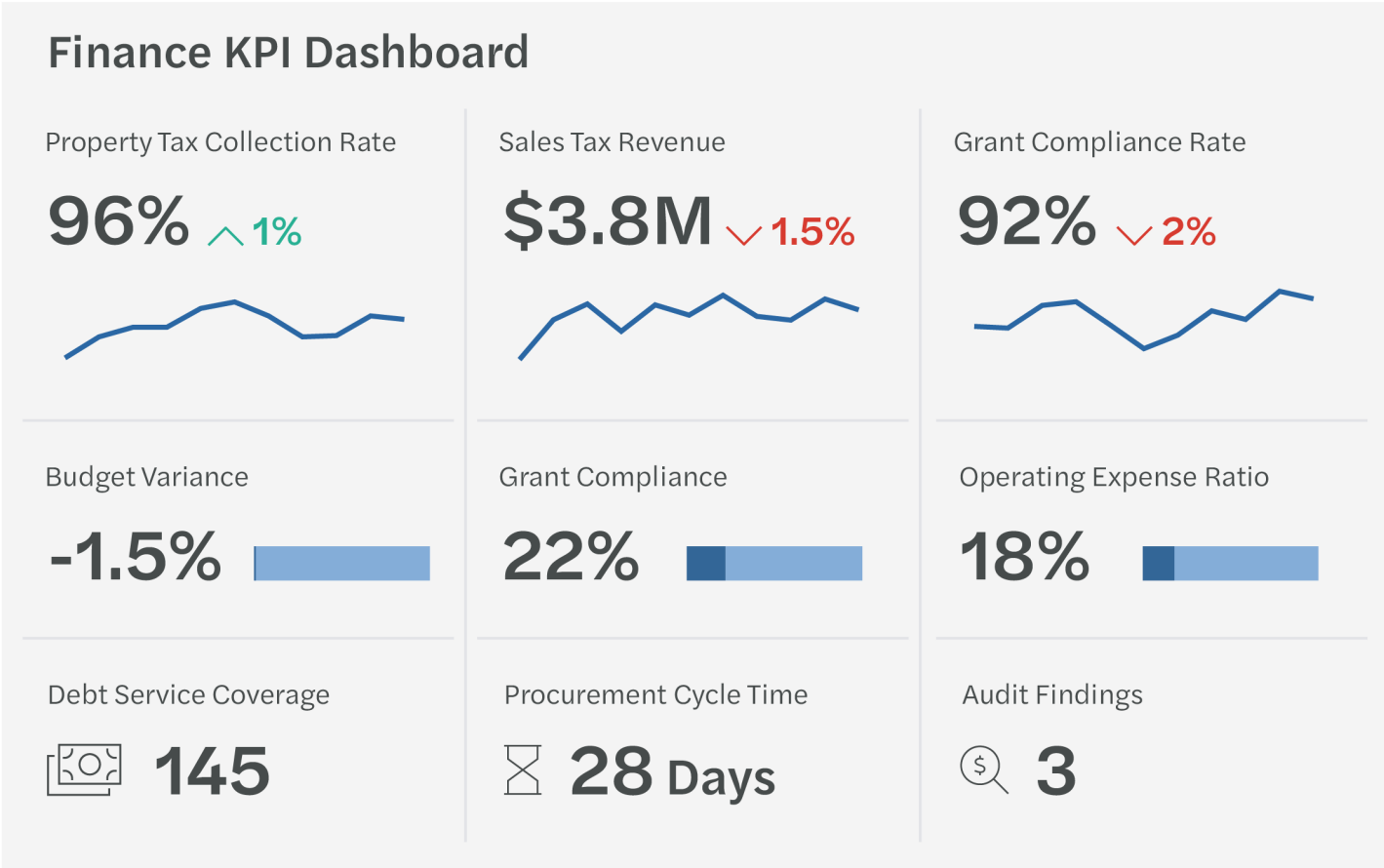
Data-Driven Resource Allocation

Analytics empower decision makers to identify trends and allocate resources more effectively.

Scalable Solutions for Governments

Data tools are scalable, supporting both large municipalities and smaller local governments.

Performance Dashboards



- Monitor key metrics in real time
- Spot trends and anomalies
- Drive accountability
- Enable proactive management
- Support data-drive decisions

City of Mesa, AZ

Payroll & Worker's Comp Automation

- **Context:** Complex payroll issues with worker compensation payments required precise multi-source calculations under strict deadlines.
- **Actions:** Mesa used RPA bots to automate data extraction, calculations, and output preparation, reducing manual workload but retaining staff oversight.
- **Results:** Automation improved payment deadline compliance, reduced errors, lowered staff stress, and enhanced auditability with traceable workflows.
- **Key Lessons:** Modernizing back-office processes strengthens government resilience and frees staff for strategic work.



Operational Efficiency Through Technology



Automation & Cloud Solutions for Finance Operations



Automation of Routine Processes

Automating invoice approvals, reconciliations, and grant reporting reduces manual workload and minimizes errors in finance operations.

Benefits of Cloud-Based Systems

Cloud financial systems offer scalability, disaster recovery, and cost savings over traditional on-premise solutions.

Empowering Finance Staff

Automation tools enhance productivity and job satisfaction by supporting staff to focus on strategic initiatives.

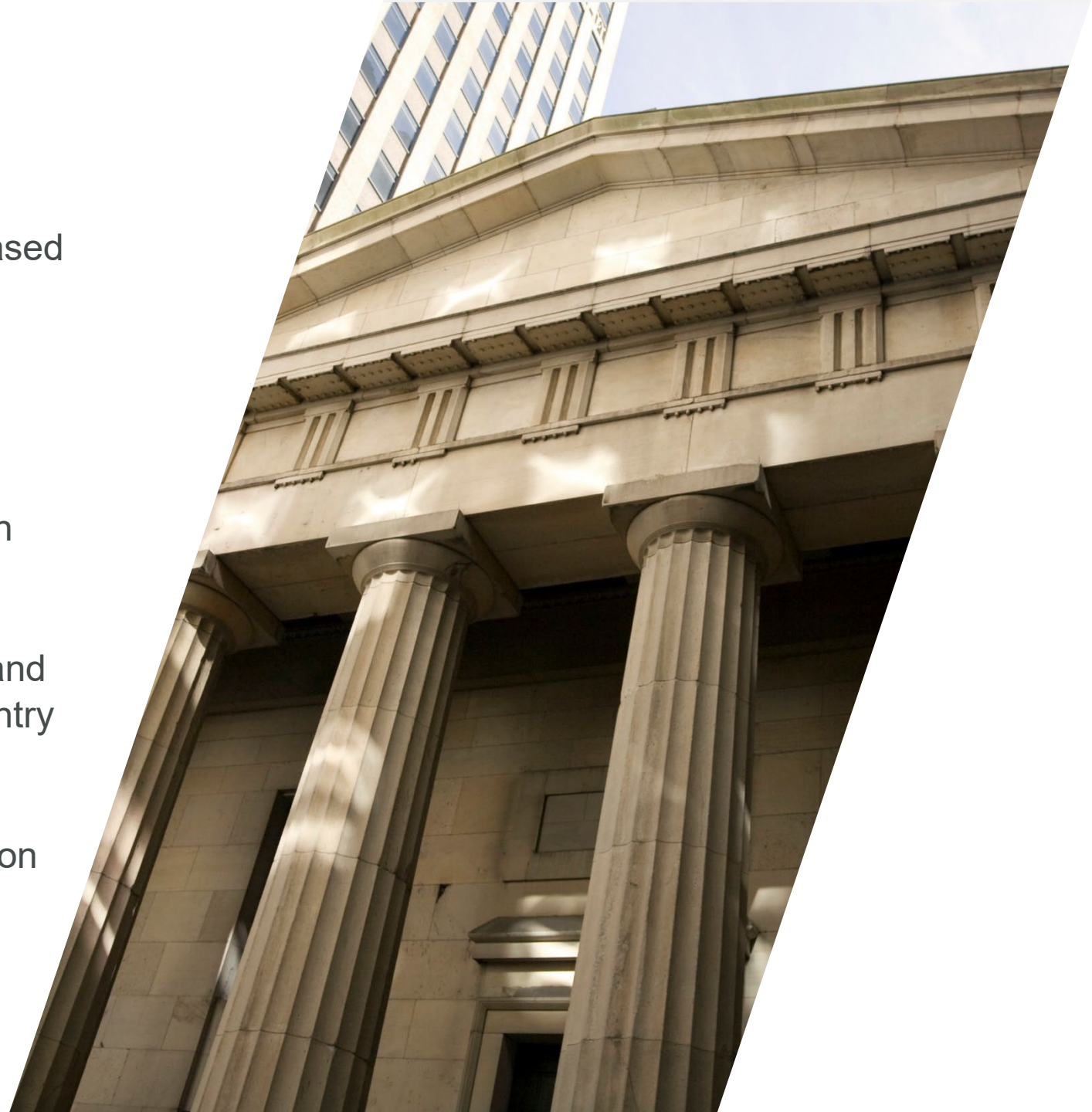
Building Resilient Operations

Adopting automation and cloud solutions helps build agile, responsive, and resilient finance operations for evolving community needs.

Minneapolis, MN

Simplified Permitting Process

- **Context:** The City was overwhelmed by paper-based event permitting applications.
- **Actions:** The permit administration team implemented Smartsheet. Digital forms replaced paper applications with automated document generation, dashboards, and DocuSign integration expedited payment collection.
- **Results:** 50% reduction in time spent reviewing and approving permit applications and manual data entry has been eliminated
- **Key Lessons:** Digitizing intake enables automation downstream, low code platforms can deliver measurable results quickly, modernization can expand capacity without adding staff.



Cybersecurity & Risk Management



Protecting Financial Systems From Emerging Threats



Cybersecurity Challenges

Local governments face increased ransomware, phishing, and insider threats impacting financial data security.

Best Security Practices

Multi-factor authentication, continuous monitoring, and staff training are essential to mitigate cyber risks.

AI-Powered Fraud Detection

AI technologies help identify anomalies in transactions, enhancing fraud prevention and response capabilities.

Collaborative Cybersecurity Strategy

Finance and IT departments must collaborate to address technical and human vulnerabilities effectively.

Salt Lake City, UT

Coordinated Homeless Response and Public Safety

- **Context:** Manual data entry and fragmented processes caused delays, duplication, and security risks in handling homelessness reports.
- **Actions:** Cloud-based platform with automated routing and rule-based escalation streamlined report management and improved response times.
- **Results:** Integrated mapping enhanced staff ability to prioritize outreach and cleanup by visualizing reports geographically.
- **Key Lessons:** Smarter workflows extended the reach of a small team, enhancing safety and accountability in public services.



Grants Management & Compliance



Strategies for Efficient Funding & Audit Readiness

Maximizing Funding Opportunities

Effective grants management helps local governments secure and retain essential funding by meeting compliance standards.

Audit Readiness and Compliance

Maintaining audit readiness involves navigating complex reporting obligations and ensuring accurate compliance tracking.

Leveraging Technology and Best Practices

Automated tools reduce administrative burden and improve accuracy in compliance and reporting tasks.

Ensuring Transparency and Accountability

Finance officers design systems to demonstrate measurable outcomes aligned with strategic goals and stakeholder expectations.

Case Study

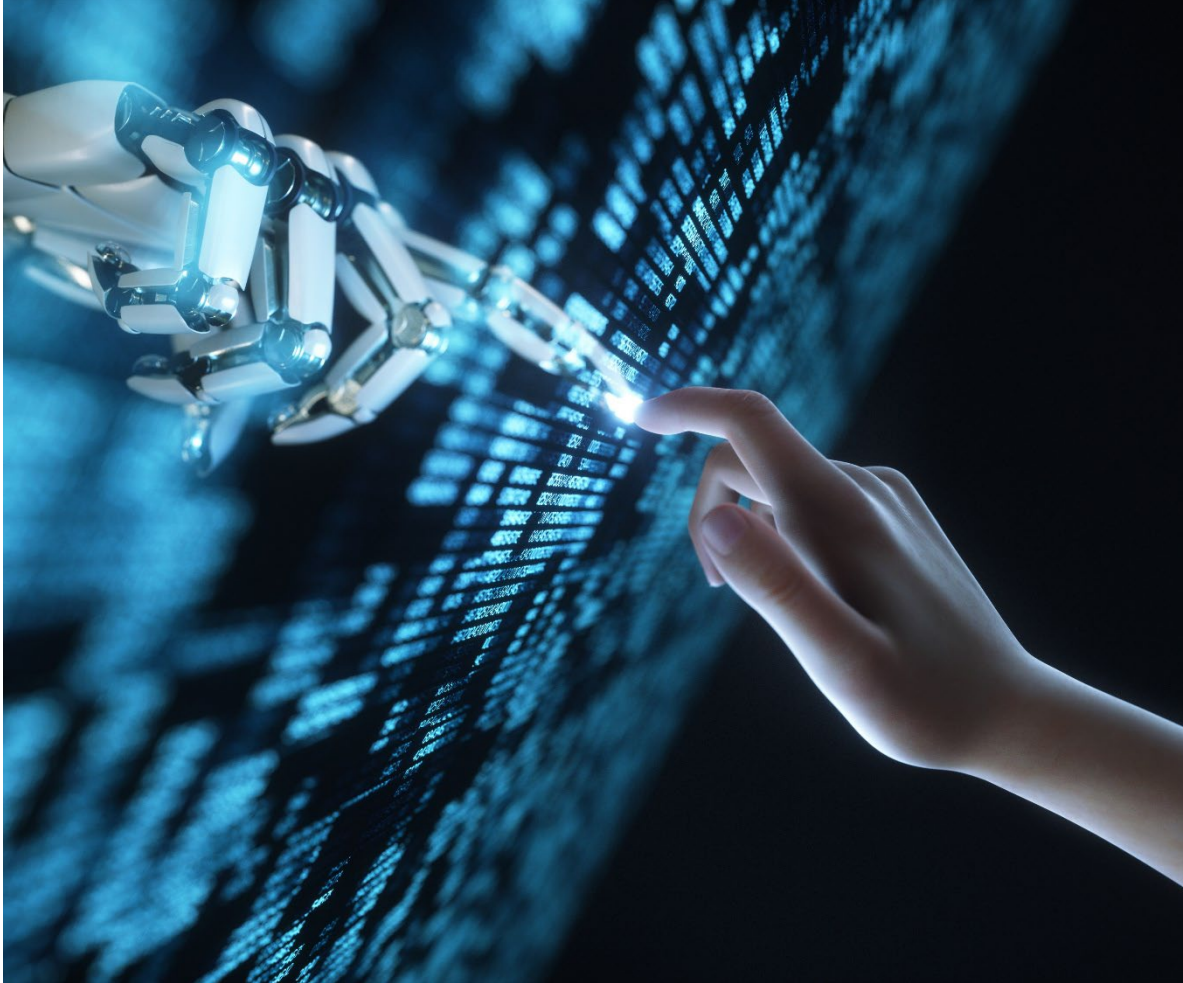
Grants Management

- **Context:** A coastal city managed 40+ active grants with varying reporting cycles, leading to missed deadlines and cash flow stress
- **Actions:** They centralized grant calendars, standardized supporting documentation, and deployed a compliance tracker with alerts and responsibility assignments
- **Results:** On-time submissions reached 100% in the next cycle; drawdown lag shrank from 45 to 12 days; audit noted improved documentation consistency
- **Key Lessons:** Centralized visibility and standard templates are essential to stay audit-ready and minimize working capital pressure

Artificial Intelligence in Local Government Finance



Applications & Benefits of AI



Automation of Routine Tasks

AI automates repetitive tasks like invoice processing and fraud detection, increasing operational efficiency.

Enhanced Decision Making

Machine learning predicts revenue trends and simulates policy impacts for informed financial decisions.

Improved Citizen Services

NLP-powered chatbots assist citizens with inquiries, improving service delivery and reducing staff workload.

Implementation Challenges

Effective AI use requires addressing data quality, ethics, and staff training challenges for success.

Real-World Examples of AI

Large Local Governments

- **City of Los Angeles – Predictive Budgeting:** AI-driven forecasting improved budget accuracy
- **New York City – Fraud Detection:** Machine learning flagged anomalies in procurement
- **City of San Diego – AI Chatbots:** Reduced call center workload by 40%
- **Miami-Dade County – Automated Invoice Processing:** Cut processing times from weeks to days
- **State of North Carolina – Grant Management:** AI optimized compliance and risk tracking

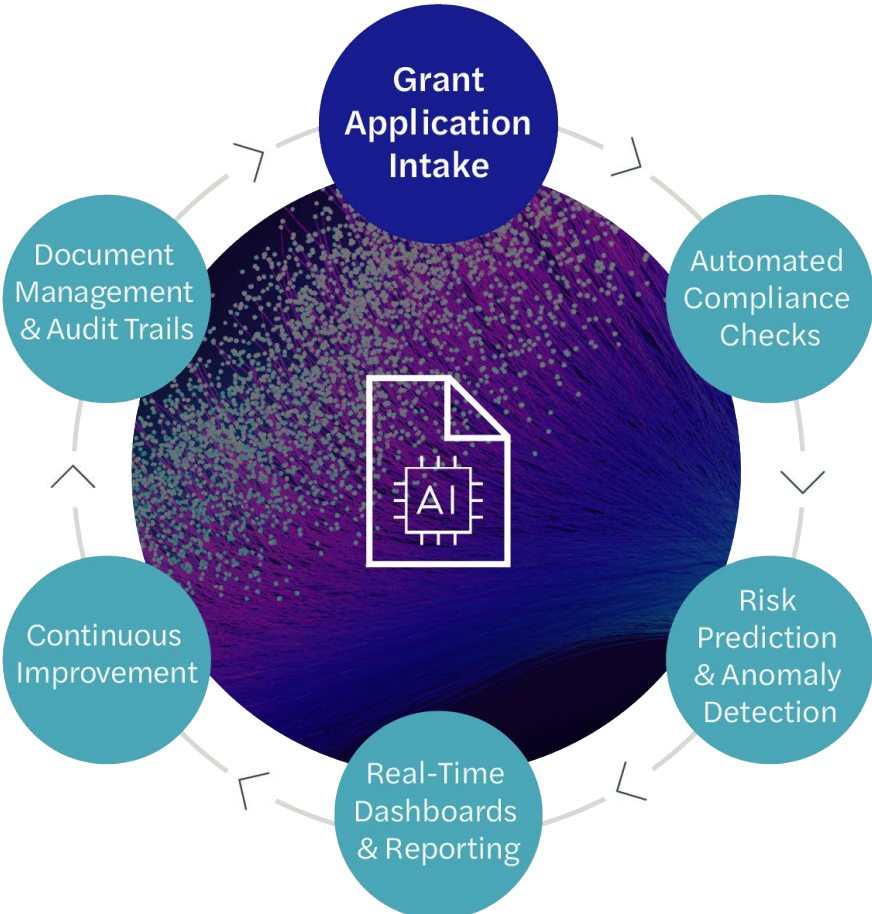
Real-World Examples of AI

Medium to Small Local Governments

- **Cary, North Carolina** (pop. 180,000) – Predictive analytics for water billing and revenue forecasting
- **Dubuque, Iowa** (pop. 59,000) – AI-driven budget planning and sustainability
- **Oak Brook, Illinois** (pop. 8,000) – Automated invoice processing
- **Coral Springs, Florida** (pop. 134,000) – AI chatbots for citizen inquiries
- **Edmond, Oklahoma** (pop. 97,000) – Machine learning for fraud detection

North Carolina AI Use in Grant Compliance

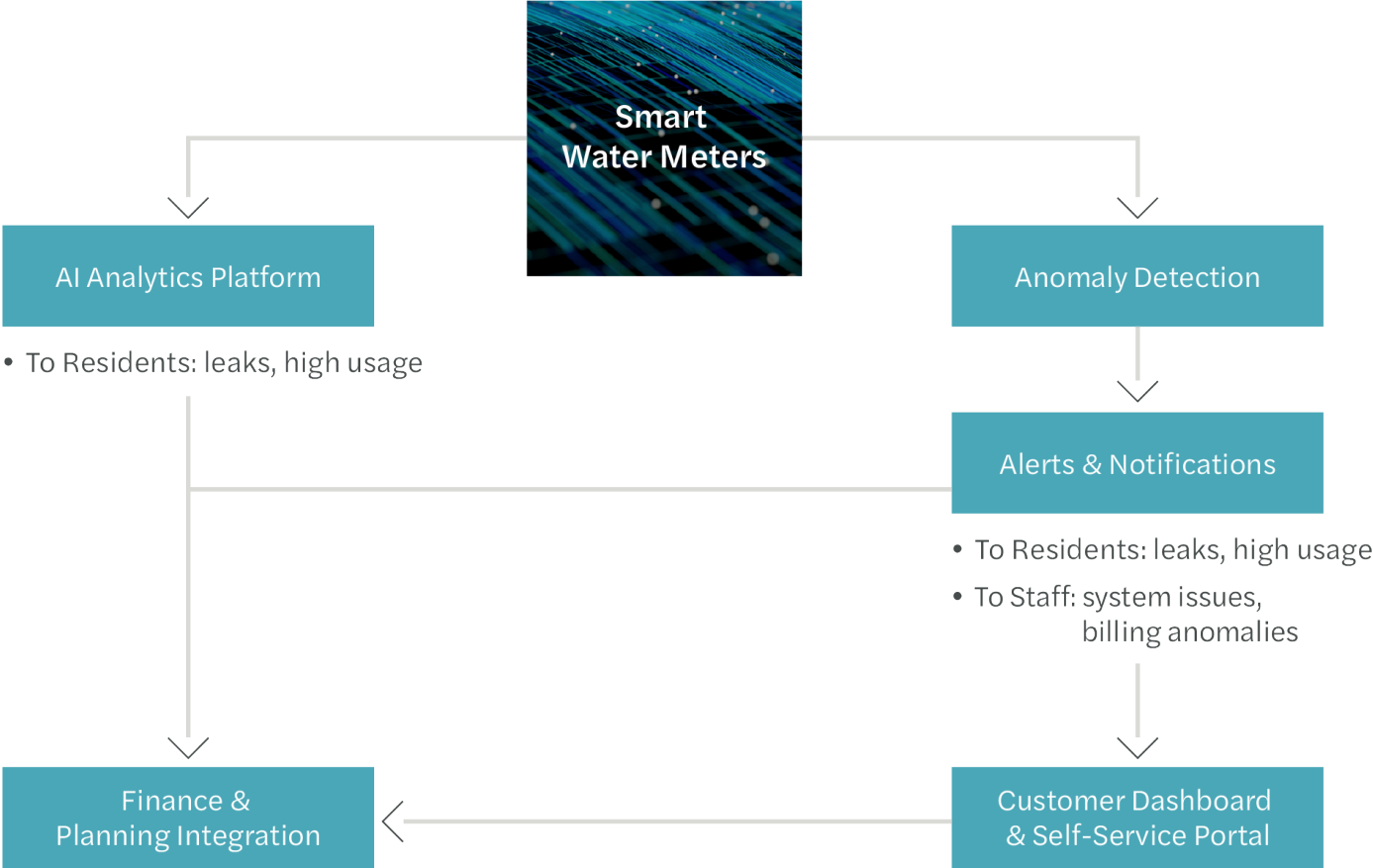
AI in Grant Compliance



1. Automated Compliance Tracking
2. Risk prediction and anomaly detection
3. Document management and review
4. Transparency and reporting
5. Continuous improvement

Cary, NC AI Use In Water Billing & Revenue Forecasting

AI-Enabled Water Billing & Revenue Forecasting



1. Smart water meters and data collection
2. AI-driven anomaly detection
3. Predictive analytics for revenue forecasting
4. Proactive customer service
5. Operational efficiency

Kansas City, MO

311 AI Initiative

- **Context:** Staff were spending significant time simply classifying, routing, and triaging requests, rather than solving them.
- **Actions:** Kansas City prioritized process design and governance before implementing AI to improve 311 service delivery. AI was introduced to classify, route, and detect service demand patterns after standardizing data and workflows.
- **Results:** Reduced manual triage and duplication improved response times and resource allocation visibility.
- **Key Lessons:** Human review remains available for ambiguous or critical cases to ensure accountability and public trust.



Building Resiliency & Continuity



Preparing For Emergencies & Economic Uncertainty



Resiliency and Continuity Planning

Robust resiliency and continuity plans help local governments maintain operations during emergencies and support recovery efforts.

Scenario Planning and Budget Stress-Testing

Scenario planning allows finance departments to evaluate budget impacts under various economic conditions and identify vulnerabilities.

Lessons From Past Crises

Flexibility, clear communication, and cross-department collaboration are key lessons for effective crisis response and recovery.

Integrating Resiliency in Planning

Embedding resiliency in financial planning strengthens response capabilities and sustains public confidence during disruptions.

Action Plan for Finance Leaders



Implementing Quick Wins & Long-Term Strategies

Quick Wins for Immediate Impact

Automating high-volume processes and deploying multi-factor authentication quickly enhance efficiency and security.

Long-Term Strategic Investments

Investing in data analytics, cloud migration, and cybersecurity road maps helps ensure sustained financial innovation.

Planning and Stakeholder Engagement

Thoughtful planning and stakeholder involvement are crucial for effective strategy implementation and ongoing evaluation.



Best Practices For Smarter, Safer, & More Efficient Finance Functions

Embrace Digital Transformation

- **Automate Routine Tasks:** Implement e-invoicing, automated reconciliations, and digital approval workflows to reduce manual workload and errors.
- **Adopt Cloud Solutions:** Migrate financial systems to the cloud for scalability, disaster recovery, and cost savings.
- **Leverage Data Analytics:** Use dashboards and predictive analytics for real-time visibility, forecasting, and strategic decision making.

Strengthen Cybersecurity

- **MFA:** Require MFA for all financial systems and sensitive data access.
- **Continuous Monitoring:** Deploy tools to monitor transactions and system activity for anomalies.
- **Staff Training:** Conduct regular cybersecurity awareness and phishing simulations for all finance staff.
- **Collaborate With IT:** Work closely with IT to address both technical and human vulnerabilities.

Best Practices For Smarter, Safer, & More Efficient Finance Functions

Optimize Resource Management

- **Cross-Train Staff:** Build resilience by ensuring staff can cover multiple roles and processes.
- **Map and Streamline Processes:** Identify bottlenecks and inefficiencies; document and standardize procedures.
- **Prioritize High-Impact Automation:** Focus on automating high-volume, rules-based tasks first.

Enhance Transparency and Accountability

- **Centralize Grants Management:** Use calendars, standardized documentation, and compliance trackers to meet deadlines and reduce audit risk.
- **Automate Compliance Tracking:** Deploy tools to monitor grant activities, flag risks, and manage documentation.
- **Stay Current on Regulations:** Monitor changes in federal, state, and GASB requirements and update policies accordingly.

Best Practices For Smarter, Safer, & More Efficient Finance Functions

Leverage Artificial Intelligence

- **Automate Invoice Processing and Fraud Detection:** Use AI-powered tools to streamline approvals and flag suspicious transactions.
- **Predictive Forecasting:** Apply machine learning to revenue and expenditure forecasting for better planning.
- **Improve Citizen Services:** Deploy chatbots and self-service portals for routine inquiries and payments.

Build Resiliency and Continuity

- **Scenario Planning:** Model budget impacts for emergencies and economic shocks; pre-approve contingency spending tiers.
- **Document Crisis Procedures:** Maintain clear, accessible documentation for emergency response and recovery.
- **Cross-Department Collaboration:** Coordinate with other departments for holistic crisis management.

Best Practices For Smarter, Safer, & More Efficient Finance Functions

Engage Stakeholders and Foster Innovation

- **Involve Stakeholders:** Engage staff, leadership, and community in planning and evaluating new initiatives.
- **Track Progress:** Set clear goals, monitor outcomes, and adjust strategies as needed.
- **Promote a Culture of Continuous Improvement:** Encourage feedback, learning, and adaptation to new technologies and practices.



Start From Where You Are

Assess your current state

- Before jumping into big system overhauls, take stock of what you have:
 - Existing processes (manual or automated)
 - Current technology stack
 - Staff capabilities and pain points
 - Compliance reporting requirements
- This creates a baseline for improvement

Leverage what works

- Identify any tools or workflows that are functional and can be optimized rather than replaced immediately
- For example, if your accounting system is outdated but still accurate, you might add reporting automation or integrate with grants management tools instead of a full system replacement right away

Start From Where You Are

Prioritize incremental wins

- Focus on high-impact, low-cost changes first
 - Automating repetitive tasks, (e.g., reconciliations, report generation)
 - Streamlining approval workflows
 - Improving data visibility with dashboards
- These quick wins build momentum and stakeholder buy-in

Plan for long-term transformation

- Use your current state as the foundation for a road map
 - Define what “modernization” looks like for your organization
 - Align improvements with budget cycles and compliance deadlines
 - Consider phased implementation to reduce risk and cost



Questions?



Contact

Forvis Mazars

Karen Kurtin, CPA, CFE, CGFO

Director & National Practice Leader,
Government Outsourced Accounting Services

P: 469.218.9173

karen.kurtin@us.forvismazars.com

The information set forth in this presentation contains the analysis and conclusions of the author(s) based upon his/her/their research and analysis of industry information and legal authorities. Such analysis and conclusions should not be deemed opinions or conclusions by Forvis Mazars or the author(s) as to any individual situation as situations are fact-specific. The reader should perform their own analysis and form their own conclusions regarding any specific situation. Further, the author(s)' conclusions may be revised without notice with or without changes in industry information and legal authorities.

© 2026 Forvis Mazars, LLP. All rights reserved.