



WEDNESDAY'S
News You Can Use

Improve Agility and Engagement with an Interactive Online Budget Book

Presented by  **OPENGOV**



Carl Vinson
Institute of Government
UNIVERSITY OF GEORGIA



Today's Webinar Speakers



Harpreet Hora

Budget Manager
City of Roswell,
GA



Mark Welch

Solutions Architect
OpenGov

1

Learn what attributes make an interactive budget and how Roswell, GA built one

2

Updates to GFOA criteria and what they indicate about budget best practices

3

Learn how to incorporate strategic planning and performance measures



An Award -Winning Year



GOVERNMENT FINANCE OFFICERS ASSOCIATION

*Distinguished
Budget Presentation
Award*

PRESENTED TO

**City of Roswell
Georgia**

For the Fiscal Year Beginning

July 1, 2020

Christopher P. Morill

Roswell wins
'Digital Cities'
recognition



Atlanta. News. Now.

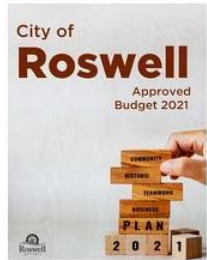
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🔍 ☀️ 73°

Roswell's Interactive Online Budget

- [Table of Contents](#)
- [Approved Budget Summary](#)
- [Fire Department General Fund](#)

City of Roswell
Table of Contents
FY 2021 Interactive Approved Book



About the City of Roswell

- [Introduction](#)
- [Letter from the Mayor](#)
- [Letter from City Administrator](#)
- [City Policies and Procedures](#)

Overview

- [Budget Overview](#)
- [City Services](#)
- [City Department](#)
- [City Administration](#)
- [City](#)


FY 2021 Summary pages:

All Fund Summary

- [Introduction](#)
- [Community Development Department](#)
- [Environmental/ Public Works Department](#)

General Fund Summary

Capital Projects Fund



Departments

| | | |
|---|--|--|
| <p>Administration Department</p> <ul style="list-style-type: none"> Administration Department General Fund Administration Department Capital Projects Fund Administration Department Other Funds City Administration City Department City Services City | <p>Community Development Department</p> <ul style="list-style-type: none"> Community Development Department General Fund Community Development Department Capital Projects Fund Community Development Department Other Funds | <p>Environmental/ Public Works Department</p> <ul style="list-style-type: none"> Environmental/ Public Works Department General Fund Environmental/ Public Works Department Capital Projects Fund Environmental/ Public Works Department Other Funds |
| <p>Finance Department</p> <ul style="list-style-type: none"> Finance Department General Fund Finance Department Capital Projects Fund Finance Department Other Funds | <p>Fire Department</p> <ul style="list-style-type: none"> Fire Department General Fund Fire Department Capital Projects Fund Fire Department Other Funds | <p>Police Department</p> <ul style="list-style-type: none"> Police Department General Fund Police Department Capital Projects Fund Police Department Other Funds |
| <p>Recreation, Parks, Historic & Cultural Affairs Department</p> <ul style="list-style-type: none"> Recreation, Parks, Historic & Cultural Affairs Department General Fund Recreation, Parks, Historic & Cultural Affairs Department Capital Projects Fund Recreation, Parks, Historic & Cultural Affairs Department Other Funds | <p>Transportation Department</p> <ul style="list-style-type: none"> Transportation Department General Fund Transportation Department Capital Projects Fund Transportation Department Other Funds | |

New GFOA Distinguished Budget Criteria

Best Practices for Budget Teams

Performance measures and strategic planning are now mandatory criteria.



Link the budget to strategic goals and initiatives and track those explicitly. [See how Ukiah, CA does this](#) and watch a [video on Ukiah's award-winning budget process](#).

Table of Contents links are now explicit criteria



Go beyond bookmarking with links directly to interactive charts and graphs and descriptions that provide context and color. See how [Roswell, GA](#) and [Sandpoint, ID](#) have done this.

An overview should be presented within understandability and usability criteria



Use other forms of communication including videos, social media, etc. to call attention to key elements. [See East Providence, RI's "Budget in Brief"](#)

Process narratives are required in many criteria (strategic goals, capital projects, long-range forecasts, etc.) and are a general focus for the award



Make sure your charts and supporting narratives are simple, clear, and well annotated. [Read Ashland, OR's succinct descriptions](#)

ADA compliance is a key part of understandability and usability



Meet ADA standards automatically by adopting a platform that ensures your data is shown in ways that it can be consumed. [See how Colma, CA ensures compliance](#).

Poll Question 1: Are you considering creating an interactive budget book in the next year?

- We are already creating an interactive budget book as part of our process
- We are planning to create an interactive budget book in the next year
- We are considering creating an interactive budget book in the next year, but have not yet come to a decision
- We are not considering creating an interactive budget book in the next year

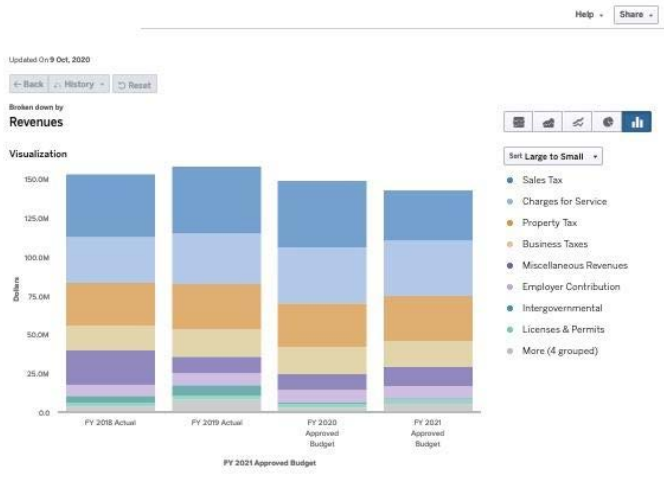
Better Financial Communications

City of Roswell Coronavirus Financial Plan for FY 2021 Proposed Budget

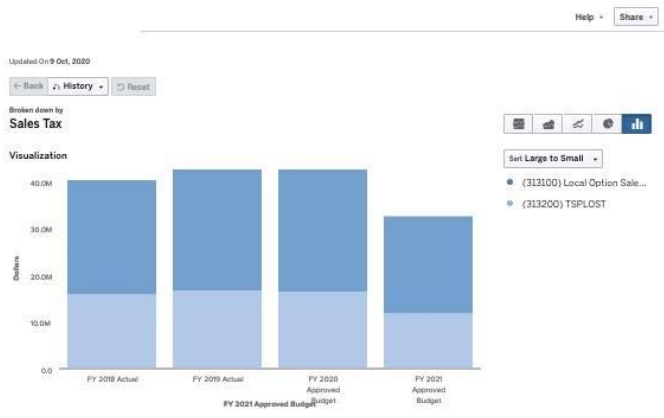
Specific Program Level Impacts

The City is tracking the virus and its effect. All changes to service levels are being updated on the City's website. Click on the link at right to see the updated information.

The City has identified several program areas we anticipate will have changes and challenges including additional funding or lower revenues in FY 2021. The FY 2021 Proposed Budget has a reserve for financial uncertainty to allow the City to respond with some flexibility as the changes develop.



Sales Tax (All Funds)



Strategic Goals

Keep Focused on Long -Term Priorities

In FY 2019, the City of Roswell approved funding for the development of a City-Wide Strategic Plan. There are two main phases to the strategic plan process; engagement and planning.

Throughout the summer and fall of 2019, the City of Roswell worked with the community to begin to develop its first city-wide strategic plan. The Vision and Engagement phase of this process included the "Get Together Roswell Listening & Learning Workshops", pop-up events at community breweries, picnics, Downtown events, and a Day of the Dead celebration, small meetings and online activities.

Over 2,000 participants contributed more than 7,000 comments that will contribute directly to the strategic plan.

The City is currently in planning phase which commenced in January 2020 with a retreat with the Planning Phase Consultant, Management Partners, and the City executive team.

The priority setting retreats with the City Council had to be postponed due to COVID-19. We are in the process now of rescheduling the priority setting conversations with the City Council and anticipate a final draft of the Strategic Plan ready for City Council adoption in December 2020.

Critical Success Factors



Accessible and Unique Parks and Natural Resources



Exceptional Livability



Effective Governance



Proactive Infrastructure and Asset Inventory



Diverse Economic Environment



Charming and Thriving Downtown



Collaborative, Innovative, and Nimble City Government



Sustainable Financial Strength



<https://pompanobeachfl.gov/pages/budget>

The Pompano Beach Story: Long-Term Strategic Planning and Financial Policies Best Practices

Forecasting and Monitoring Revenues and Expenditures

Measuring What Matters Most

The City of Pompano Beach's Long-Term Planning: Strategic Planning and Performance Management

- The **Five-Year Planning Process** takes place each year in Jan/Feb before the end of the previous five-year plan.
- The **Annual Planning Process**, a department activity setting based on establishing annual program priority goals.
- The **Quarterly Performance Reviews** are held at the department level, with each quarter focusing on different departments.
- The **Quarterly Strategic Plan Presentation** at City Commission meetings to share with City Commissioners and the community strategic plan implementation progress.
- **DATA Meetings** are held monthly, with each month focusing on a different department to review reported performance data and targets.

Strategic Planning Roadmap Diagram

The Strategic Plan provides overall direction and vision for the City of Pompano Beach as a high-level planning document. The five-year planning cycle contains six (6) high level community goals that reflect stakeholder input and promotes the City's long-term vision by FY 2035: Pompano Beach is a superior place to live, visit, and locate or expand a business along the Atlantic



https://stories.opengov.com/pompanobeachfl/published/BOydy_VjD

Poll Question 2: Do you use scenario plans to help with the uncertainty of forecasting for your jurisdiction?

- We monitor economic conditions and make adjustments to our scenarios when forecasts change
- We created scenario plans in our last budget cycle but do not routinely update them during the year
- We do some best and worst -case forecasts but have not created formal scenarios with them
- We focus on creating a balanced budget with our best -guess forecasts but do not try to create a range of possible scenarios

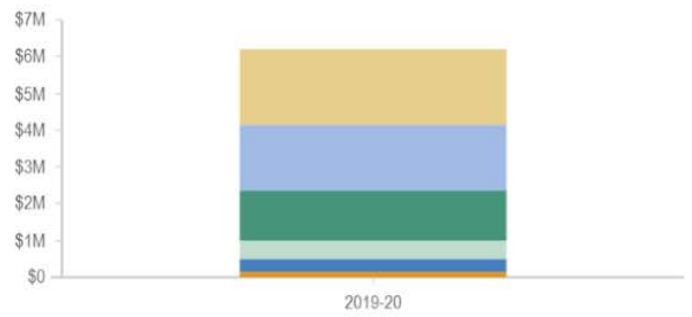
Fighting Chance Fund goal:

Reactivate the economy by providing grants to businesses and affected individuals

- Phase 1 Business
- Phase 1 Individual
- Phase 2 Businesses
- Phase 2 individuals
- Phase 3 BM Businesses
- Phase 3 HB Businesses

Fighting Chance Fund Total Approved

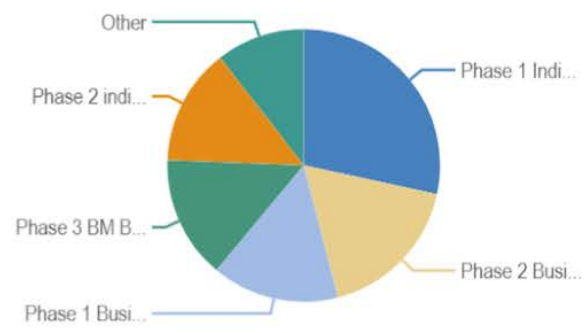
Phase 1, Phase 2 and Phase 3 approved applications



\$6,211,000.00
Subject in 2019-20

Fighting Chance Fund Total Approved Count

Total count of applications approved in Phase 1, Phase 2 and Phase 3 of the FCF with i...



2,356
Subject in 2019-20

Past: Paper - Based, In - Person

Workflow



Economic Development
City Clerk
Legal

Economic Development
Procurement
Finance

Procurement Finance

Total Time: 3 -4 Weeks for all applicants

Now: Digitally -Enabled Workflow

Submission

Approval

Payment

Fully Digital
Online
Application

Grantee
Validated (one -
upload)

Request for
Payment
(one-upload)

Payments
made via ACH
quick pay apps

Department -Level Dependencies:

Economic Development

Procurement

Finance

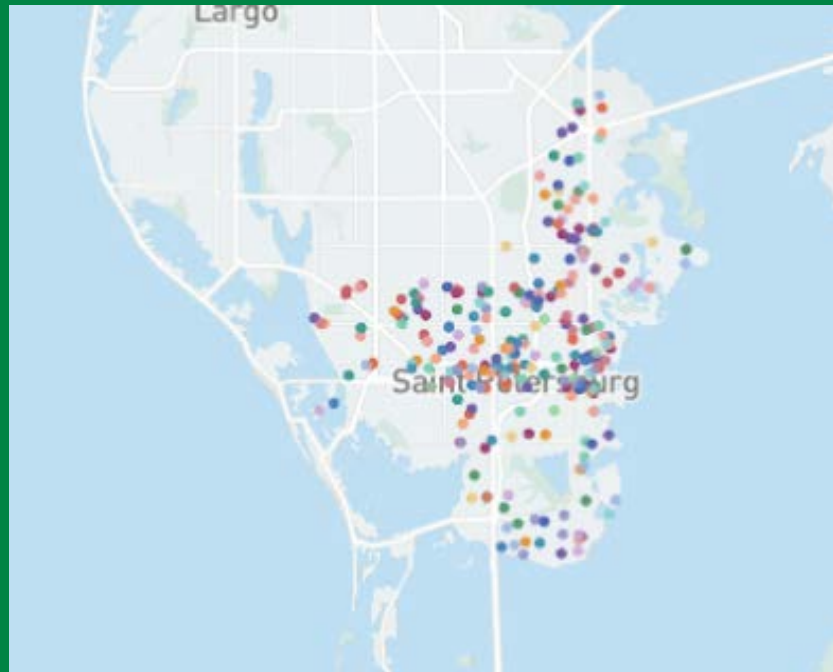
City Clerk

Legal

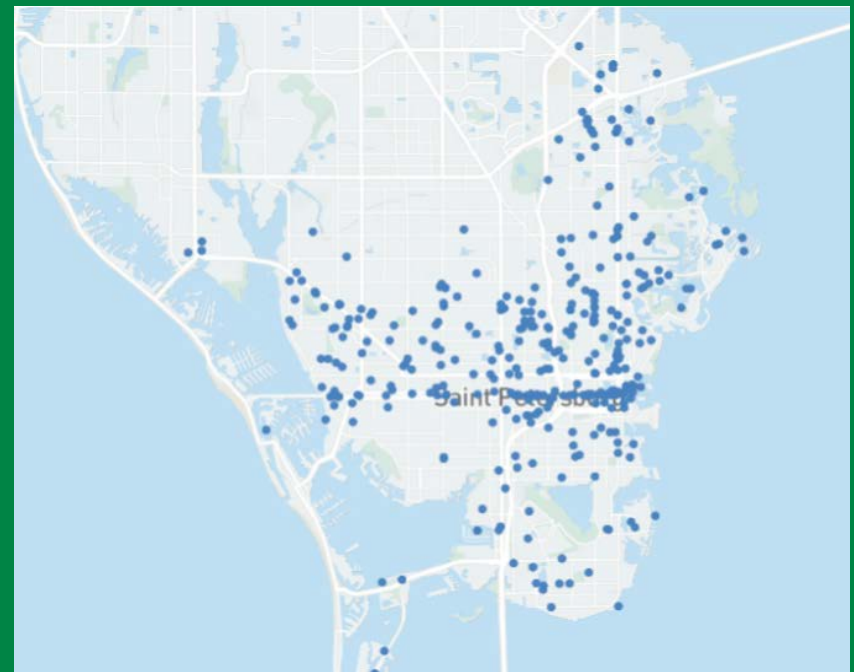
Legal

Total Time: 2 days (individuals); 1 week (businesses)

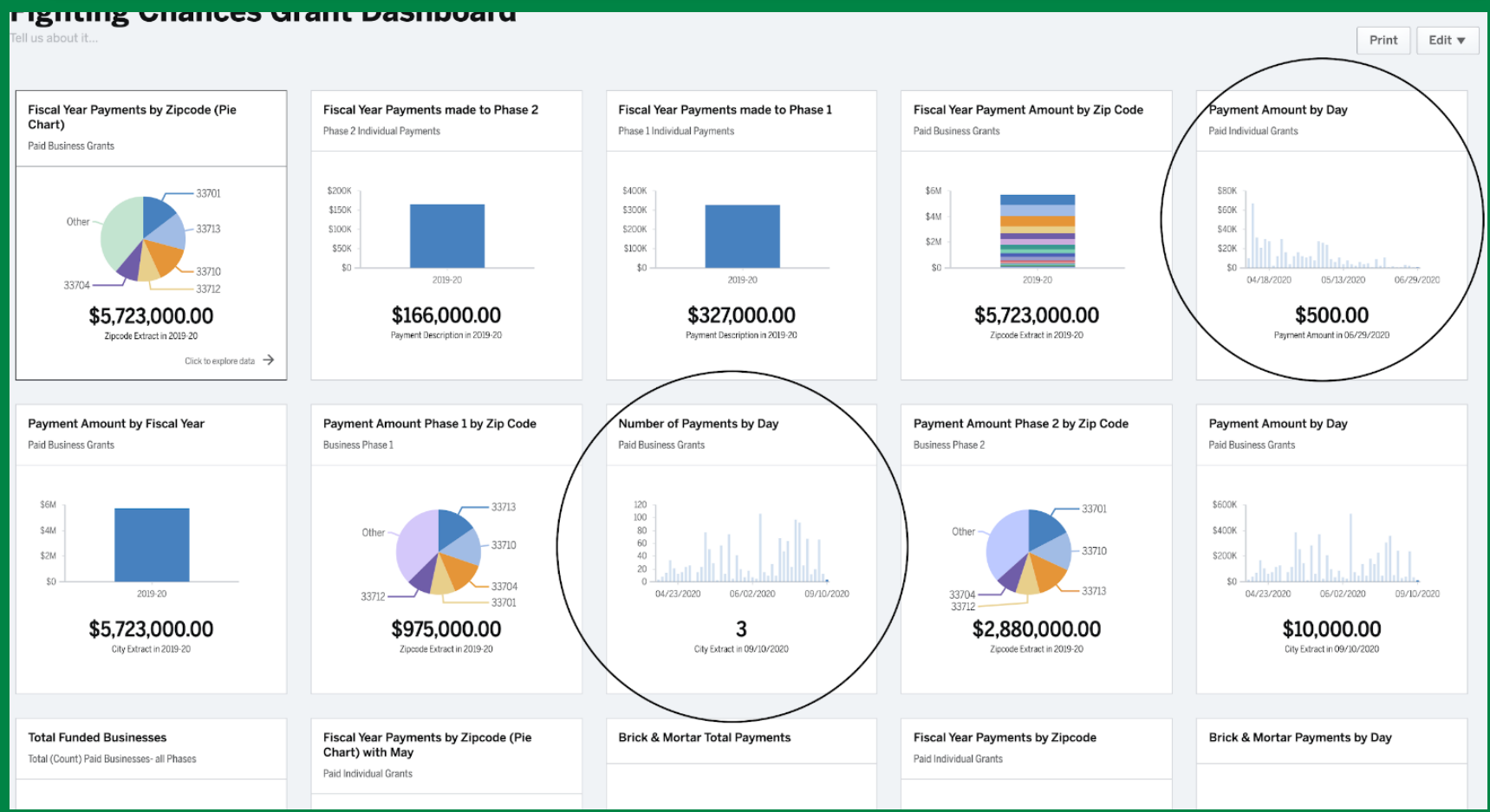
Map of Paid Individuals



Map of Paid Businesses



Sharing a View and Vision



Poll Question 3: What steps are you taking to enable economic development in your city/county? (check all that apply)

- We are making grants available to businesses and/or individuals via online applications
- We are simplifying our internal processes for grant applications
- We are reworking our comprehensive plan and/or strategic initiatives
- We are simplifying our internal processes for code and permit workflows
- We are making more/better data available to improve transparency

Key Learnings

1. Interactive budgets helps government leaders clearly link spend to strategic priorities with narrative and context and interactive charts and graphs, while also automating updates to the budget to make it more timely, relevant, and understandable for all.
1. Evaluating performance continuously across the year to identify gaps quickly and keep everyone focused on higher -order strategic goals is no longer a nice -to -have, it's a must -have for budgeting and planning teams.
1. Proactively publishing economic development data in a way that makes it easy to understand is critical when resources are constrained and/or there are numerous stakeholders.

QUESTIONS?



Thank You!



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