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HIGH-PERFORMANCE BUDGETING AND PLANNING HANDBOOK

Profiles of Innovative, Local Government Finance Leaders

A Perfect Storm

Local government leaders are facing a perfect storm: five forces are driving them to transform how they work and serve—from risks like **cyberthreats** and the **"silver tsunami,"** to opportunities like **federal funds**, the **cloud transition**, and the heightened **demand for digital services**

There has never been a more challenging and critical time to modernize local government.

What can you as a leader do to build a resilient community and leave a lasting legacy, especially if you only manage one key functional area or department?

Doing nothing is not an option, since it will leave your community under-served and unprepared for the future.

> *"We have to become the kind of leaders who look out a year, or two, or more and say 'what are we going to need?'"*

RUSSELL HAUPERT
CTO and Director of Technology and Innovation City of Tampa, FL

The Good News

There are many different paths that government leaders of all stripes can take to modernize processes and improve the way they work and serve.

Whether you serve in a leadership role or oversee a department or team, you can drive modernization in your government.

This handbook outlines what a high performance government looks like, across key functions and departments, with best practices gathered from across the thousands of cities, counties, school districts, and special districts that OpenGov serves.

To get started on modernizing your department or function—whether it's budgeting and planning, enterprise asset management, procurement, or permitting and licensing—this handbook provides key insights to help you advance how your team works and serves.

Why Is High Performance So Important Now?

Without proactively preparing for these risks and opportunities, your government and community may be left behind and under-serve your community. Consider each risk an opportunity and ask yourself these questions:

(-) Ransomware attacks — On-premise servers and legacy systems are getting attacked, putting entire communities at risk of loss of services or other disruptions. **Are your systems and data safe?**

(+) Federal funding — Recent legislation presents an enormous opportunity for impact on both external and internal projects. **Are you using these funds to prepare your government to serve the future needs of your community?**

(-/+) "Silver Tsunami" — Baby Boomers are retiring at high rates and knowledge is walking out the door, but there's also an opportunity to make lasting changes. **How are you making your government or department a talent magnet?**

(-/+) Customer Service Culture — Residents increasingly demand a personalized, customer-focused experience when interacting with their governments. **How can you boost service levels to build trust with your community?**

(-/+) Reporting Requirements — Residents and stakeholders are demanding more data, and state and federal requirements look to be expanding. **How are you meeting demand for data and transparency from your stakeholders and community?**

To proactively address these challenges and embrace opportunities to advance the way they work and serve, innovative local government leaders take a step back and focus on five key tenets of a high-performance government.

Introducing the Five Tenets of High-Performance Government

1 Effective, Innovative Teams

2 Efficient Processes

3 Measurable, Actionable Results

4 Clarity and Accountability

5 Community Engagement

The Road to High Performance is a Journey, Not a Destination

Just as your infrastructure needs constant upkeep, a high-performance government requires constant attention and dedication that can't be defined by checking off a list.

The high-performance government journey means you are always striving to be better today than you were yesterday—you're forever evolving and improving, and you're never "finished."

Let's dive into each of these five tenets, showcasing high-performance governments along the way.

1 Effective, Innovative Teams

The right people are the pulse of your agency. But, as we already know, people are retiring fast and it's harder than ever to attract talent. Additionally, many staff need a mindset shift about what they can and should do in their roles.

And it's not just building innovative, effective teams that represent this element of high-performance government. It's also how teams collaborate across departments. Strategic initiatives, comprehensive planning, agency goals, and more all require both collaborative planning and internal accountability.

To foster collaboration across your departments, give teams tools to clearly communicate, set achievable goals, establish roles and responsibilities, and encourage departments to share their skills and knowledge. Most importantly, take manual work off their plates to make space for more strategic work, and invite them to be a part of change and establishing new processes and procedures to overcome personal barriers to change in the organization.

What does this look like? Read on for examples from:

Minneapolis City of Lakes | City of Minneapolis, MN

EFFECTIVE, INNOVATIVE TEAMS

Minneapolis, MN

Amidst fiscal uncertainty and social unrest, the City had to make tough budget decisions while also meeting its equity commitments. The budget team knew that across the board cuts would not be an effective strategy.

Instead, the team used OpenGov Budgeting & Planning to accurately forecast revenues and costs, and then asked departments to provide performance data for programs to assess the impact and inform tradeoff decisions.

Today, Minneapolis has mastered the art of an agile, collaborative multi-year strategic budgeting process that focuses on performance as well as spend.

2 Efficient Processes

High-performance government and manual processes go together like oil and water—they just don't mix. When teams across an agency are drowning in paper, there's no way they can focus on the strategic initiatives that really move the needle.

So, how do you make your processes high-performing? Consider the manual tasks that slow down timelines. (Hint: Most of these involve paper.) Streamline them with modern tools that move the work into the cloud.

Not only does this save time across teams, it also better protects your agency from risks, such as severe weather events and cybersecurity attacks, not to mention making data more accessible to your teams, departments, council, and others.

What does this look like? Read on for examples from:

Tuolumne County, CA

EFFICIENT PROCESSES

Tuolumne County,

Tuolumne County is the epitome of high-performance government. The team is passionate about making it easy for residents to engage with their government, and they needed their processes to enable that.

First, the team implemented OpenGov Budgeting & Planning to bring the budget process online, allowing finance to build the operating budget in just a couple of weeks. Doing this allowed other departments to work in the system and residents to view their online budget book, easily finding the information they needed.

Since adopting the Budgeting & Planning software, the County's procurement and permitting processes have also been moved to the OpenGov Cloud, improving efficiency across the entire agency. Now, all departments are spending more time on strategic efforts.

3 Measurable, Actionable Results

Sharing results is key to showing your impact to internal partners and residents. However, many agencies struggle with how to get started.

The key is to start small as you begin working with measurable results. The approach should be crawl, walk, run. So, begin by collecting the data you have and build upon what is most impactful. While on the way, regularly check in on goals and motivate your team with accessible dashboards. It's all about striving towards continuous improvement so leaders can not only keep a finger on the pulse of operations, but also can make data-driven decisions to increase performance with the most accurate information available.

Your agency doesn't have to do this alone. When updating your processes with a modern software solution, like OpenGov, the implementation team can help you define your KPIs and build them into dashboards.

What does this look like? Read on for examples from:

City of Tampa, FL

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Tampa, FL

The City of Tampa's leaders know that stand-alone data or datasets cannot effectively reflect the great work of their government. To be meaningful, data must be woven together – like a story– to reflect the priorities and ambitions of a community.

From the mayor, to the CIO, to the budget leader, the Tampa team works together to determine which data best reflect the City's investments and priorities, and then they build an internal dashboard to track key data and learn what drives the best results for the City. When they are confident in the data and the impact to their community, then they publish data to Tampa's metrics website where residents and stakeholders can see (and even analyze) key performance metrics across all departments.

With this focus on data and transparency, the City is publicly tracking everything from affordable homes and good-paying jobs to resiliency and sustainability. The best part: It's all easily accessible to internal stakeholders to keep.

4 Clarity and Accountability

Today, it's no longer enough for government to be transparent. High-performance governments clearly articulate goals, action plans, progress, challenges—and results. Then, they do what they say they're going to do. Doing so builds trust and creates accountability, inside and outside their government.

This level of transparency can be a heavy lift for agencies that manually pull reports to showcase results and keep themselves accountable. Today, the best software partners populate reports and dashboards for you, while offering transparent, online options for residents to see action.

What does this look like? Read on for examples from:

SAVANNAH
savannahga.gov   City of Savannah, GA

⌥ **CLARITY AND ACCOUNTABILITY**

Savannah, GA

In the City of Savannah, leaders want residents to understand, in real time, how the City is doing, what the challenges are, and how their work affects residents today and the days going forward. The team knows providing data is the best way to restore resident trust.

The City displays all collected data, from financial to performance, in easy-to-understand visuals online. That means no more sifting through cell after cell in a spreadsheet for residents to get what they need. Plus, internal teams can easily see the long-term impact and tangible outcomes from their daily work, bringing a new level of meaning to their roles.

> *"I want the city of Savannah stakeholders to have a full, clear, and present understanding of what's happening in the government... where there are no secrets."*

MAYOR VAN JOHNSON
The City of Savannah, GA

5 Community Engagement

High-performance governments proactively engage residents. Whether it's asking for input on spending or making it easier for residents to see what their government agencies are budgeting funds on, there are many ways to start conversations before your residents demand them.

The easiest way to make that happen is to meet residents where they are: online. Showcasing data and enabling individuals to seek their own answers is the first step. High-performance governments also seek out input into planning and priorities. Proactively connecting to your constituents not only increases engagement, it gives clear feedback and allows you to make better decisions.

What does this look like? Read on for examples from:

ATLANTA PUBLIC SCHOOLS | Atlanta Public Schools, GA

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Atlanta Public Schools, GA

Atlanta Public Schools (APS) is a recognized leader in school district budgeting. The district has won GFOA's Award for Best Practices in School Budgeting, is part of the Rethinking Budgeting initiative, and is a leader for equality, innovation, and adaptation.

Using OpenGov Budgeting & Planning, APS is able to connect the budgets of all 91 learning sites in the district, leading to centralized and strategic decision-making. APS also publishes an online consolidated budget report with interactive data elements to help anyone understand the numbers.

Reporting and communications features available with OpenGov enable online and in person survey data collection, and the ability to showcase results within online strategy and budget webpages in a simple story format.
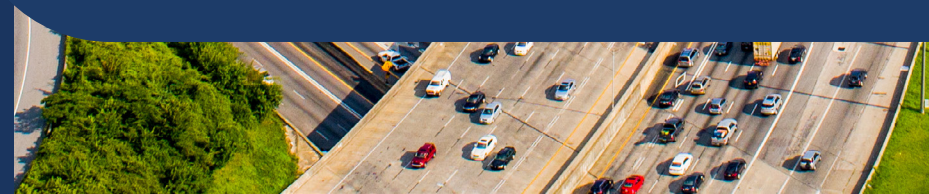
"As leaders, we have to ask what outcomes people want to see, and then ask ourselves how we can align resources to achieve those outcomes"

HARPREET HORA
Executive Director of Budget Services, Atlanta Public Schools

The Road to High-Performance

The budget is the single-largest lever governments have to affect change. Driving meaningful impact requires identifying strategic priorities, aligning your team, securing the resources, managing the execution, and communicating impact.

The most successful governments integrate their strategic priorities into all operating activities to create an end-to-end strategic plan, resourced by an annual or biennial budget.

No matter how you currently budget, every government can make small and meaningful changes to increase your budget process maturity and better align the budget to strategic priorities.

The framework below will help you, your team, and stakeholders answer the following questions:

1. Where are we now?

2. Where do we want to make improvements to our process?

3. What can we do in the next budget cycle to advance our process?

Budgeting & Planning

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01
Initial

Budget process is centralized

Budget is compiled on separate and disparate spreadsheets and paper print-outs

Budget is an incremental, annual planning process

02
Managed

Budget is organized by department

Departments manage their budget submissions

Budget is built in a shared software suite that provides access and visibility to all

03
Defined

Budget is key to measuring progress on strategic initiatives

Budget breaks out separate discretionary proposals to evaluate

Budget justification is tied to historical performance

04
Strategically Managed

Budget is organized by programs or projects

Budget is the result of cross-functional teams breaking silos to collaborate on proposals

Budget is updated based on changing priorities

05
Optimized

Budget justification is tied to delivering community outcomes

Budget proposals are supported by both financial and non-financial performance measures to track progress year-round

Budget process incorporates community feedback into key decisions consistently

Your High-Performance Partners

At OpenGov, we're to help navigate the high-performance road ahead. We understand your partnership is more than just a software purchase. It's the start of a new way to do business, and you'll need experts that can help you set and achieve your high-performance goals. Look for an organization that's as invested in your journey as you are, and one that offers a thorough combination of training, support, coaching, and consulting.

Remember, high performance is a journey—not a destination. And your partners should be with you every step of the way.

Start Your Digital Transformation

Power more effective and accountable government with modern cloud software.

Learn more about OpenGov, the most flexible and delightful budgeting, permitting, procurement, asset management, and transparency solution on the market. Empower your team to:

➕ Build a better budget in half the time.

➕ Digitize paper-based workflows and improve customer satisfaction.

➕ Strategically manage every infrastructure asset.

➕ Turbocharge eprocurement from start to finish.

About OpenGov

OpenGov is the leader in modern cloud software for U.S. cities, counties, state agencies, school districts, and special districts. With a mission to power more effective and accountable government, OpenGov serves thousands of public sector leaders and their teams across the U.S. and is built exclusively for the unique budgeting and planning, financial management and accounting, permitting and licensing, procurement, and infrastructure asset management needs of the public sector. The OpenGov Cloud makes organizations more collaborative and efficient and enables best-in-class communication with stakeholders and your community.