



Leaders at the Core of Better Communities

2011 Annual Awards Program Program Excellence Awards Nomination Form

Deadline for Nominations: March 11, 2011

Complete this form (sections 1 and 2) and submit with your descriptive narrative.

SECTION 1: Information About the Nominated Program

Program Excellence Award Category (*select only one*):

- ☐ Community Health and Safety
- ☐ Community Partnership
- ☐ Community Sustainability
- ☒ Strategic Leadership and Governance

Name of program being nominated: Open.PalmBay

Jurisdiction(s) where program originated: City of Palm Bay, Florida

Jurisdiction population(s): 107,252

Please indicate the month and year in which the program you are nominating was fully implemented. (Note: All Program Excellence Award nominations must have been fully implemented by or before January 31, 2010, to be eligible. The start date should not include the initial planning phase.)

Month: December Year: 2009

Name(s) and title(s) of individual(s) who should receive recognition for this award at the ICMA Annual Conference in Milwaukee, Wisconsin, September 2011. (Each individual listed MUST be an ICMA member to be recognized.):

Name: Lee Feldman

Title: City Manager Jurisdiction: City of Palm Bay, FL

Name: Jonathan Lewis

Title: Deputy City Manager Jurisdiction: City of Palm Bay, FL

Name:

Title: Jurisdiction:

SECTION 2: Information About the Nominator/Primary Contact

Name of contact:	<u>Lee Feldman</u>		
Title:	<u>City Manager</u>	Jurisdiction:	<u>City of Palm Bay,</u> <u>FL</u>
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ICMA Program Excellence Award

Strategic Leadership and Governance Program Excellence Award (populations 50,000 or greater)

<http://open.palmbayflorida.org> – Financial Transparency at the Public's Fingertips

We have all been faced with pending legislation from our state capitol that makes us cringe. However, sometimes that very same legislation that may seem daunting can often foster innovation and leadership. In 2009, a bill was proposed in the Florida Legislature to mandate every local government with populations over 20,000 to provide a searchable online database for every expenditure made and for every revenue received.

The City of Palm Bay looked upon this as an opportunity. In January of 2009 the national economy was spiraling downward, taking the perception of local government with it. More than ever before citizens want to be informed about the use of their tax dollars, and they have a right to hold local governments accountable for how they are spending their dollars. Palm Bay viewed this legislation not only as an opportunity to demonstrate whether or not the bill was even achievable for other local governments, but more importantly it was an opportunity to improve the public's trust in how their dollars were being spent.

In March of 2009 a development team journeyed down the path of creating a completely searchable and easy to use database for all revenues and expenditures of the City. The team was a cross-functional representation composed primarily of employees from the

City's finance and information technology departments. Other City departments were consulted throughout the project. The project was championed by the City Manager and facilitated by the Deputy City Manager. The team's goal was to create a sense of public trust and ownership for the community through increased financial transparency.

The project had several pre-conditions. All financial information would be made available online as long as it was allowed by law. Issues with public safety officers, property alarms and HIPAA concerns were addressed while still providing enough information to plainly show where each dollar was used. To avoid any security concerns, a plan was developed to segregate the searchable database from the City's financial system to a "middleware" database, which would present the data to visitors on the City web site. Finally, by creating this database we would not create any additional ongoing workload for staff.

As the project progressed from an idea to a work-in-progress, the team was flexible and made adjustments to concerns easily. The project was divided into several main areas or "milestones" to create intermediate goals to help diminish the enormity of the data. The milestones created by the group included: salaries, expenditures, and revenue and each became stand alone projects. Each section was reviewed, planned, tested, and reviewed again prior to the start of the next phase. This process minimized confusion, showed progress to a finished product, and avoided any mistakes from crossing into other project areas. Each team member learned something about the other member departments. The team was able to assist each other with the sometimes simple task of

translating function specific terms into a language that could be easily understood by the everyday user. Accounting and technological terminology was replaced with phrases that citizens could understand without a dictionary, even though a glossary was included in the final product.

Open.PalmBay was created using existing software and resources. No money was expended to create the site. By pooling the expertise of the City's financial professionals along with human resources experts and computer network database professionals, development of the database took approximately six months, with full implementation in an additional three months.

In December 2009, with the use of innovative technology and in-house know-how, the City created Open.PalmBay, an online interactive database that allows the public to view and search the City's financial information at any time. Open.PalmBay is accessible via the City's website at www.palmbayflorida.org or directly at <http://open.palmbayflorida.org>. The information within the database is presented in three separate areas; Expenditures, Salaries and Revenue. The site also incorporates the City's Comprehensive Annual Financial Report (CAFR). The financial information is updated quarterly. Visitors to the site are given several different options to sort or filter the available information for online viewing, or they may export reports to several different file formats (Microsoft Word, Microsoft Excel or Adobe PDF) for offline viewing. The site includes a glossary of terms used in the financial data and a Frequently Asked Questions (FAQ) section.

Every financial transaction can now be viewed using this system, from the \$15,000 spent on park improvements to itemized lists of money spent for office supplies to individual employee salaries that can be searched by name or job title. The site also lists sources of revenues such as fees, fines, taxes and confiscated funds. The intuitive database enables citizens to follow their money right down to the penny. As the first of its kind in the state of Florida, this easy-to-use website sets the benchmark for financial transparency in local government.

This project could be easily replicated by any local government if they have a dedicated team committed to providing financial transparency to its citizens. Support for a project such as this must come from city management and leadership; key decision makers must buy in to the concept and its benefits. To accomplish this type of undertaking, the team must be flexible, creative and willing to think outside the box to find solutions. In addition, staff must adhere to standard operating procedures of planning, reviewing, testing and reviewing again to provide a mature product. A mistake filled product is not an option when presenting how tax dollars are used. This database is not a one-time display of financial transactions - it will continue to change along with the annual city budget. Therefore, future needs and maintenance requirements must also be a part of the original plan.

Involving the citizens in the process of government is vital to the growth of any community. If the citizens understand the process and why decisions are made, they are more likely and willing to become active participants, and in some cases, even

advocates. With the development of this initiative, Palm Bay is creating well-informed citizens, an even more accountable local government and an increased trust among both.

Interestingly the proposed legislation was ultimately not approved. However, based on citizen input and the calls we received from other cities, we are confident this was a worthy initiative demonstrating both leadership and innovation in the pursuit of public trust.