Key Trends in the New Approach to Governing

OpenGov + Customers
ICMA Conference Presenter

#ICMA2018

ICMA conference

BALTIMORE 2018
104th Annual Conference
SEPTEMBER 23–26

Key Trends in the New Approach to Governing

September 25, 2018

How are today's government leaders driving big impact in their communities?

Let's watch: Edgewood KY video

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Today's Speakers

OpenGov Customer Panelists

BRIAN DEHNER
City Administrative Officer
Edgewood, KY

AUSTIN GILLEY
City Manager
Abilene, KS

KLARRYSE MURPHY
Chief Financial Officer
Ravalli County, MT

Moderator

ZAC BOOKMAN
Co-Founder & CEO
OpenGov

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City of Edgewood, KY

Saving citizens' lives and making an open impact!

- Quick access to data and facts in a Council meeting allowed a tax measure to be passed

- By passing that measure, the city was able to add four firefighters/EMS

- Fire/EMS response times have improved; enabling better care for citizens

- We used performance indicators to change policy and add resources through the budget process to positively impact our community
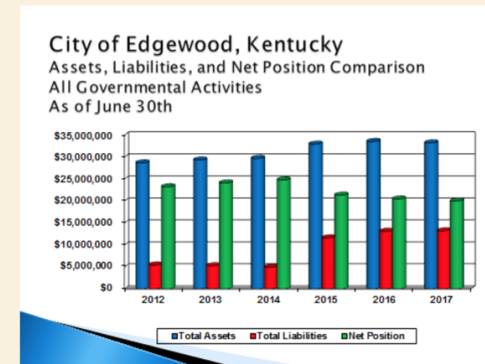

Edgewood, KY

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Sharing our audit story

- Get accurate data out to our elected officials and residents in a timely manner.
- You don't need specialized training on complicated software to produce the stories.
- This gives you a large marketing firm feel.
- Can be used for print or social media.

THE CITY OF EDGEWOOD

Audit Comes Back with No Issues

Van Gorder, Walker & Co., Inc. Presents Audit to City Council

City of Edgewood, Kentucky
Assets, Liabilities, and Net Position Comparison
All Governmental Activities
As of June 30th

City of Edgewood, Kentucky
Cash and Investment Balances
All Governmental Activities
As of June 30th

Edgewood's Financial Strength

The City Edgewood over the last couple years has invested a large sum of their revenues in road, facility and park improvements. Because of this the value of Total Assets for the City has been steadily increasing over the last 5 years.It looks as if the City has increased debt in the City but that was a GASB reporting change that made cities include any projected pension liability to be reported.This on paper increased debt by 50%.
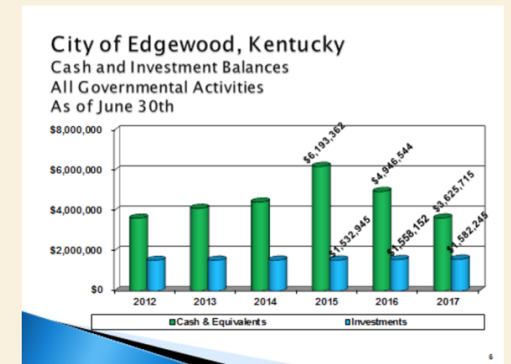
Cash and Investments

In 2015 the cash balance was inflated by a loan to help subsidize the Dudley Road construction project.The Dudley Road construction project is estimated at $10 million, we have received close to $6 million in Federal Grants to assist with the project.The cash reserves are back to normal levels, around $4 million.Our investment total is a reserve amount for emergencies.We keep this amount on a regular basis and periodically add to the amount.

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Educating citizens through Stories

- Leverage OpenGov Stories to wrap a narrative around your data
- Timely communication, ease of use, glossy finish

Dashboards

- Fills the need to be able to quickly evaluate and track different departmental expenditures.

- For a smaller city, it gives us the ability to develop dashboards without having expensive IT personnel costs.

- The dashboards can be structured for both financial and non-financial data.
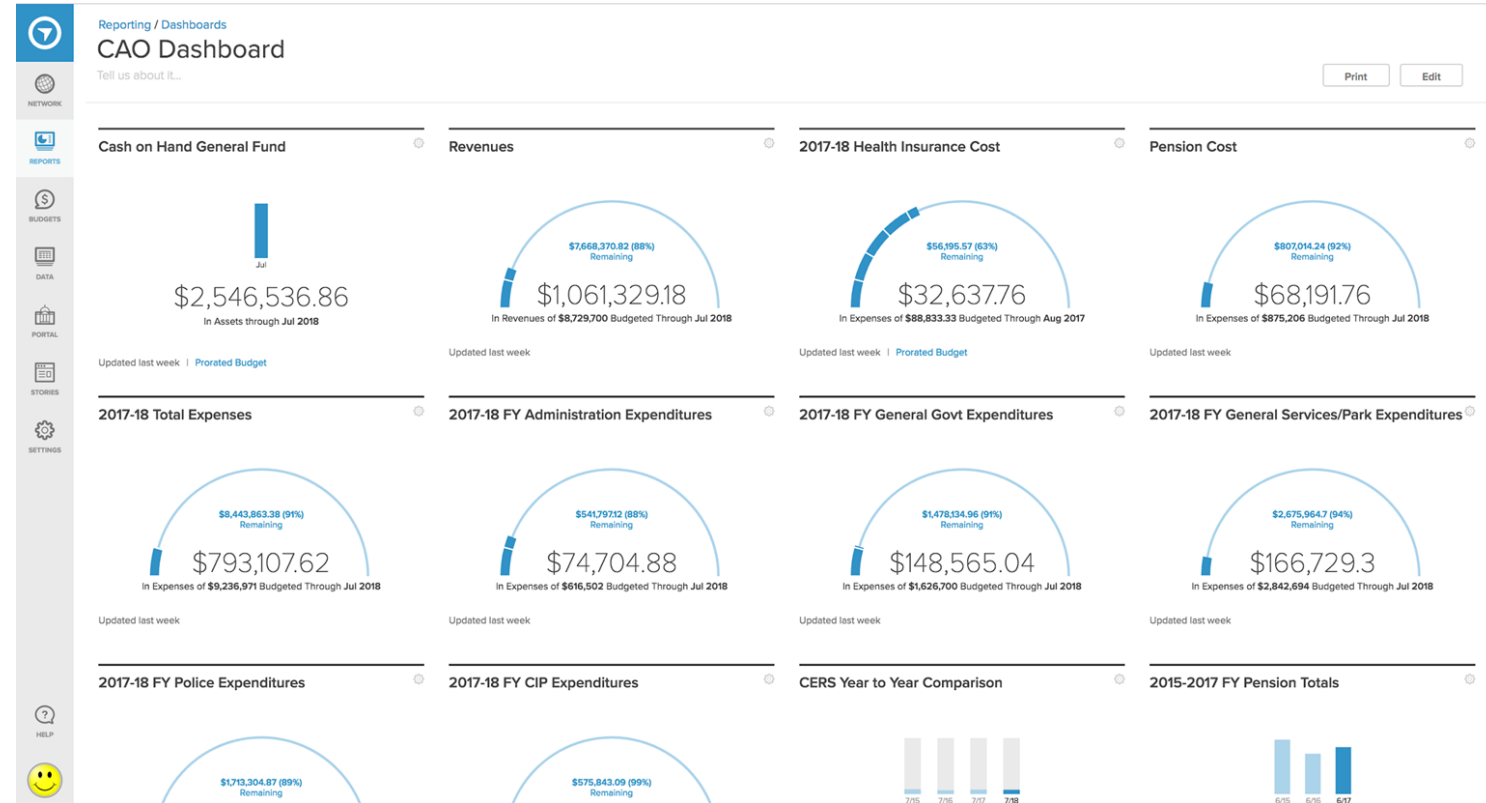
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Dashboards

- Able to take citizen complaints and heat map them
- Think out-of-the-box and see if you can integrate other software products with OpenGov
- This gives a one stop shop when looking at financial, non-financial and customer complaints issues

County of Ravalli, MT

[Case study](#)

Saving time and money with modern budgeting!

- Annual savings of $70k (one FTE)

- Reduced budget completion time by 30% (6 months to 4 months)

- Eliminated spreadsheets and reduced costly errors with automated software

- Enabled self-serve reporting (critical with workforce cut by 14%)

Ravalli County, MT

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Budget Prep Time at Ravalli County

- "Fear Factor" of being ready with accurate data for 5-person Board of County Commissioners
- Months of data input to Excel spreadsheets with constant updates on "actual" data
- Strict fiscal policies to adhere to
- Help department heads/elected officials with questions & make changes for them on submitted worksheets
- 3 FTEs in Finance Department with 1 dedicated to payroll & grants coordination and the other (Comptroller) dedicated to accounts payable, school ledger, bank recs, etc.

On the way to the top of the Gateway Arch in St. Louis!

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Ravalli County Budget Process for FY July 1 - June 30

- Starts in February with Finance Department doing data input of budget worksheets (50+ budgeted funds) with actual data on current year through January 31.
- Worksheets then sent to department heads/elected officials to prepare.
- Every line item requires a separate worksheet with detailed justification prepared by department heads/elected officials.
- Worksheets returned to Finance Department by first of April where Finance then updates worksheets to March 31 actual data.
- Preliminary budget hearing begins in late April where changes made.
- Preliminary budget hearing continues last week of June. Finance updates worksheets 2nd time for May 31 actual data in preparation of this.
- Final budget decided in August. Finance updates a 3rd time with final data.
- Although process effective in controlling spending, the time expended is exceptional.

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Budget Process with Excel

GENERAL FUND - Justice Court #1 - #1000-20

	ACTUAL			**FY 2017**		Variance Budget to Actual	**FY 2018** REQUEST	CHANGES	**FY 2018** PRELIMINARY BUDGET	CHANGES	**FY 2018** FINAL BUDGET
	FY 2014	FY 2015	FY 2016	ACTUAL	BUDGET						
20 Justice Court #1											
410341 Judicial-Admin-Justice Ct											
110 Salaries & wages	133,273	132,973	127,011	136,538	137,577	1,039	139,894	-	139,894	2,219	142,113
111 Overtime	-	33	-	-	-	-	-	-	-	-	-
140 Employer contribution	40,892	48,339	47,717	52,846	53,399	553	55,560	142	55,702	397	56,099
SALARIES, WAGES & BENEFITS	174,165	181,345	174,728	189,384	190,976	1,592	195,454	142	195,596	2,616	198,212
210 Office/operating supplies	2,902	3,228	2,122	2,237	2,500	263	2,500	-	2,500	-	2,500
310 Postage	1,303	2,106	1,457	1,486	1,500	14	1,800	-	1,800	-	1,800
332 Memberships	1,180	1,190	390	320	425	105	425	-	425	-	425
342 Telephone	99	122	417	383	400	17	400	-	400	-	400
356 Purchased services	402	331	25	100	300	200	300	-	300	-	300
361 Office equipment maint	990	1,127	1,678	1,968	1,678	(290)	1,382	-	1,382	-	1,382
370 Auto mileage	1,225	513	762	619	1,015	396	1,011	-	1,011	-	1,011
372 Meals/Lodging/Incidentals	1,229	907	690	1,147	1,280	133	1,168	-	1,168	-	1,168
380 Training/training materials	-	-	600	850	885	35	885	-	885	-	885
OPERATIONS & MAINTENANCE	9,330	9,524	8,141	9,110	9,983	873	9,871	-	9,871	-	9,871

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Zero base budgeting (hybrid)

- Fiscal Policy reviewed every year
- All expenses requested must be detailed and justified
- Start from a "zero base" and every operational expense (excluding personnel) within that department/office shall be analyzed for its needs and costs for the upcoming Fiscal Year

DEPARTMENT: Justice Court Department #1

FY 2018 Budget Request   Attach any documentation you think necessary to support this request.

370 Auto Mileage

Detail auto mileage expenses. Mileage rate is 53.5 cents per mile.	Amount	Analysis of need/Justification
Judges Fall Conf. - Missoula	$53.00	100 miles roundtrip @ .535 cents
Clerks Fall Conf - Missoula	$161.00	100 miles roundtrip @ .535 cents for 3 days
Judges Spring Conf - Billings	$397.00	742 miles roundtrip @ .535 cents
Clerks Spring Training - TBD	$200.00	TBD - estimate
Judges Spring Dist Mtg - TBD	$200.00	TBD - estimate
TOTAL AMOUNT REQUESTED FOR #370 AUTO MILEAGE	1,011.00	NOTE: THIS AMOUNT SHOULD AGREE TO YOUR "BUDGET WORKSHEET"

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Budget Process for FY 2019

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Now: Less pressure, less time-consuming

- No Excel spreadsheet data input – real-time update of actual data in OpenGov
- No more massive budget book creation for Commissioners (some budgets were 30+ pages; now most department budgets are 2 pages)
- Purchased a SMART TV for Commissioners' meeting room – in budget hearing, we have OpenGov on the SMART board & review and make changes right then & there
- Export proposals from OpenGov to create budget into format required by State of Montana
- Budget used to require 90% of CFO time from February through September and 50% of Comptroller time. Comptroller has not been involved this year. CFO has averaged about 60% of her time.
- Department heads/elected officials have commented on their time savings and the fact that they can collaborate with others during the process.
- IT Department loves that we don't need server space.
- Department heads love that they can access their budgets not only at the office but also from home. And when coding their expenses, they no longer need to access pages of info or call the Finance Department. They just go straight to OpenGov.

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The Future

- Looking forward to placing OpenGov on the County's website (ravalli.us) in the near future for transparency purposes.

- The FY 2020 budget process should be even more streamlined since there will be no training involved and only new budgeted funds will need to be input to OpenGov.

- CFO will enjoy spring and summer much more and may even take a vacation in April (unheard of!!).

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City of Abilene, KS

Driving two-way citizen engagement!

- Need an Open Impact approach

- Driving citizen engagement through use of Open Town Hall

- User-friendly: 100% satisfaction

- Enabling better decision-making

- Build two-way trust and confidence

Abilene, KS

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No chickens allowed...

Open Impact requires commitment

- Staff, elected officials, community

- Situation analysis:

  ○ Angst

  ○ New officials

  ○ Strategic uncertainty

  ○ New City Manager

  ○ Product promotion vs. long-term viable resource

  ○ Be brave…

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Innovate…or…lay an egg

But I want chickens!

- Animal issues = controversy

- Normalizing productive conflict leads to Open Impact

- Am I really an "eggspert" anyway?
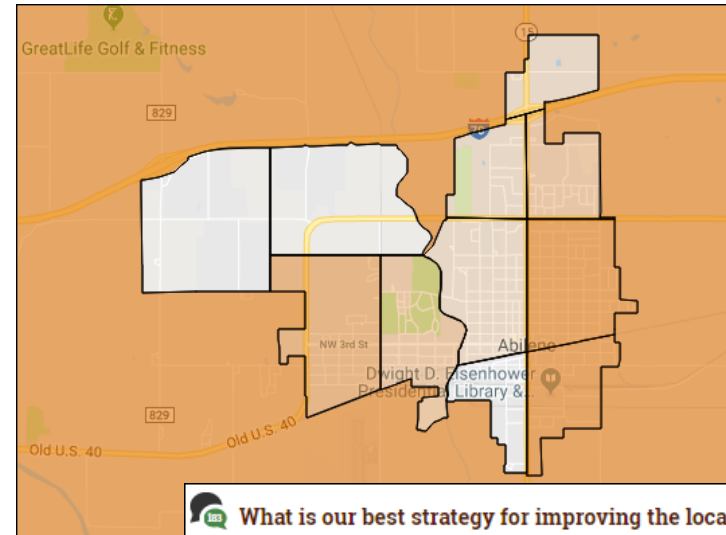
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Round Table

Study Sessions/ Work Session

- Regular and routine

- Open-ended

- Back room perception

- Let's invite everyone!

The Abilene Round Table
JOIN THE COMMUNITY CONVERSATION TODAY

OPENGOV

The Abilene Round Table

Strategically selected topics

- Grade our draft budget

- How would you invest taxpayer money to improve economy?

- Should backyard chickens be allowed?

- Fireworks restrictions

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The Abilene Round Table

The Rollout

1. Set a personal tone…

2. Weekly AM radio show announcement

3. Plan B: Social Media

4. One post every day for about a week, a few boosts

5. Invite all board members to post and set tone

6. Add another timely question: Fireworks

7. Post an outcome

8. 19 comments vs. 19 phone calls

9. Newspaper picked up on the energy…

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The Abilene Round Table

So far, so good…

- 100% satisfaction

- 500+ visitors in first two weeks

- Equivalent of hours of feedback

- Personal connection

- Raise the conversation level

- Go-to resource

- Get comfortable with Openness

- Impact is happening…

Response	Comment
Yes	I feel like what I am saying will be considered
Yes	It is a great way to provide transparency and that is very important to me. Being active in local government should help commissioners and staff in making these hard decisions.
Yes	Cause I can't make it there and I work.
Yes	It made it very easy to voice my opinion without having to go to any special meetings.
Yes	Nice to see people's input
Yes	Ease of use and accessibility to issues in the city
Yes	Easy to use and similar to the other survey platforms I use.
Yes	Cool idea
Yes	good way to voice opinon when we are to busy to come to meetings especially when we run a business
Yes	We will see how this shapes future descisions
Yes	Any chance to have input into the decisions of a taxing entity is a chance worth taking.
Yes	It's an easy avenue to be heard.
Yes	Glad to have in put using this convenient format.

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Recap: Key Trends in Governing

What we heard today from our panelists:

- Use performance indicators to change policy and save lives!

- Save time and money with modern budgeting - do more with less

- Enable better decision-making through two-way citizen engagement

- Leverage technology to allow yourself to be more strategic and to execute well

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Q&A

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City Administrative Officer
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Thank you!

For more information, contact
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