Key Trends in the New Approach to Governing

OpenGov + Customers
ICMA Conference Presenter

#ICMA2018
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
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
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
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.
Educating citizens through Stories

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

Edgewood Police Department

We want to provide the best possible police service to our residents

Edgewood Police Dept. Summary

The Edgewood Police Department is on duty 24 hours per day, 365 days per year. There are 15 police officers, all certified as Kentucky Law Enforcement Officers, with varied backgrounds and talents. There is a Chief, Lieutenant, 3 Sergeants, 2 School Resource Officers, Detective, and 7 Patrol Officers.

If ever there is a question about calling the police, we encourage folks to be safe and make that call. The sure way to contact us is by calling either 911 in cases of emergency or through the Kenton County Dispatch Center at 859-356-3191.
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.
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%)
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.
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.
## Budget Process with Excel

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

<table>
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<tr>
<th></th>
<th>FY 2014</th>
<th>FY 2015</th>
<th>FY 2016</th>
<th><strong>ACTUAL</strong></th>
<th><strong>BUDGET</strong></th>
<th><strong>VARIA-NCE</strong></th>
<th><strong>BUDGET TO ACTUAL</strong></th>
<th>FY 2018</th>
<th>FY 2018</th>
<th>FY 2018</th>
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<tbody>
<tr>
<td><strong>FY 2017</strong></td>
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<td><strong>20 Justice Court #1</strong></td>
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<td>410341 Judicial-Admin-Justice Ct</td>
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<td>133,273</td>
<td>132,973</td>
<td>127,011</td>
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<td>137,577</td>
<td>1,039</td>
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<tr>
<td>110 Salaries &amp; wages</td>
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<td>-</td>
<td>2,002</td>
<td>3,228</td>
<td>2,122</td>
<td>2,237</td>
<td>2,500</td>
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<tr>
<td>111 Overtime</td>
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<td>1,303</td>
<td>2,106</td>
<td>1,457</td>
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<td>140 Employer contribution</td>
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<td>1,190</td>
<td>390</td>
<td>320</td>
<td>425</td>
<td>105</td>
<td>425</td>
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<td>-425</td>
<td>-425</td>
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<td>SALARIES, WAGES &amp; BENEFITS</td>
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<td>122</td>
<td>417</td>
<td>383</td>
<td>400</td>
<td>17</td>
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<td>402</td>
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<td>25</td>
<td>100</td>
<td>300</td>
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<td>300</td>
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<td>332 Memberships</td>
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<td>990</td>
<td>1,127</td>
<td>1,678</td>
<td>1,968</td>
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<td>342 Telephone</td>
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<td>1,225</td>
<td>513</td>
<td>762</td>
<td>619</td>
<td>1,015</td>
<td>396</td>
<td>1,011</td>
<td>-1,011</td>
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<tr>
<td>356 Purchased services</td>
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<td></td>
<td>990</td>
<td>1,127</td>
<td>1,678</td>
<td>1,968</td>
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<td>(290)</td>
<td>1,382</td>
<td>-1,382</td>
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<tr>
<td>361 Office equipment maint</td>
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<td></td>
<td>1,225</td>
<td>513</td>
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<td>619</td>
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<tr>
<td>370 Auto mileage</td>
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<td></td>
<td></td>
<td>1,225</td>
<td>513</td>
<td>762</td>
<td>619</td>
<td>1,015</td>
<td>396</td>
<td>1,011</td>
<td>-1,011</td>
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<tr>
<td>372 Meals/Lodging/Incidentals</td>
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<td></td>
<td>990</td>
<td>1,127</td>
<td>1,678</td>
<td>1,968</td>
<td>1,678</td>
<td>(290)</td>
<td>1,382</td>
<td>-1,382</td>
</tr>
<tr>
<td>380 Training/training materials</td>
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<td></td>
<td></td>
<td>1,225</td>
<td>513</td>
<td>762</td>
<td>619</td>
<td>1,015</td>
<td>396</td>
<td>1,011</td>
<td>-1,011</td>
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<tr>
<td>OPERATIONS &amp; MAINTENANCE</td>
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<td></td>
<td></td>
<td>9,330</td>
<td>9,524</td>
<td>6,141</td>
<td>9,110</td>
<td>9,983</td>
<td>873</td>
<td>9,871</td>
<td>-9,871</td>
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</table>

*This table shows the budget process with Excel for the Justice Court #1. The table compares actual and budgeted amounts for various categories, including salaries, wages, and benefits, and provides a breakdown of variances and changes to the budget.*
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
Budget Process for FY 2019
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.
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!!).
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
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…
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?
Round Table

Study Sessions/ Work Session

- Regular and routine
- Open-ended
- Back room perception
- Let’s invite everyone!
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

[Map and chart images are not described in the context.]
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…
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…

<table>
<thead>
<tr>
<th>Response</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>I feel like what I am saying will be considered</td>
</tr>
<tr>
<td>Yes</td>
<td>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.</td>
</tr>
<tr>
<td>Yes</td>
<td>Cause I can’t make it there and I work</td>
</tr>
<tr>
<td>Yes</td>
<td>It made it very easy to voice my opinion without having to go to any special meetings</td>
</tr>
<tr>
<td>Yes</td>
<td>Nice to see people’s input</td>
</tr>
<tr>
<td>Yes</td>
<td>Ease of use and accessibility to issues in the city</td>
</tr>
<tr>
<td>Yes</td>
<td>Easy to use and similar to the other survey platforms I use</td>
</tr>
<tr>
<td>Yes</td>
<td>Cool idea</td>
</tr>
<tr>
<td>Yes</td>
<td>good way to voice opinion when we are too busy to come to meetings especially when we run a business</td>
</tr>
<tr>
<td>Yes</td>
<td>We will see how this shapes future decisions</td>
</tr>
<tr>
<td>Yes</td>
<td>Any chance to have input into the decisions of a taxing entity is a chance worth taking</td>
</tr>
<tr>
<td>Yes</td>
<td>It’s an easy avenue to be heard</td>
</tr>
<tr>
<td>Yes</td>
<td>Glad to have in put using this convenient format</td>
</tr>
</tbody>
</table>
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
Thank you!

For more information, contact
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