3rd Annual Better Budgeting Webinar

Creating a Budget Aligned with Community Priorities

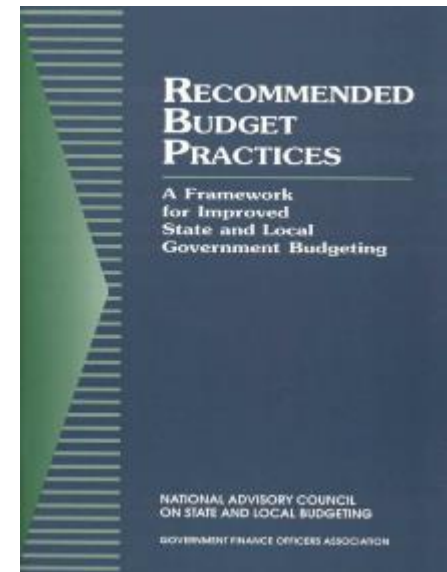**GFOA** Government Finance Officers Association

Session Agenda

○ Overview

○ How to Identify Priorities

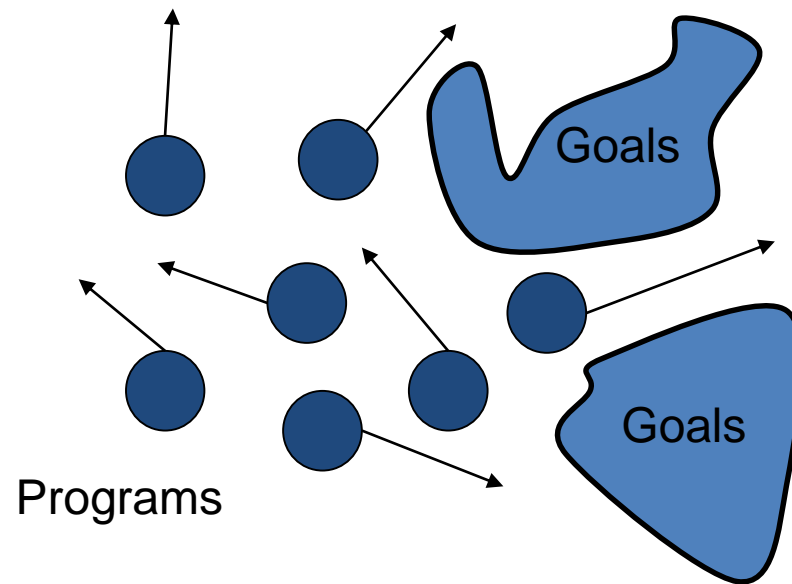○ How to Get Valuable Input from Citizens

○ How to Align the Budget

NACSLB

- Principle 1: Establish Broad Goals to Guide Government Decision Making

- Principle 2: Develop Approaches to Achieve Goals

- Principle 3: Develop a Budget Consistent with Approaches to Achieve Goals

- Principle 4: Evaluate Performance and Make Adjustments

RECOMMENDED BUDGET PRACTICES

A Framework for Improved State and Local Government Budgeting

NATIONAL ADVISORY COUNCIL ON STATE AND LOCAL BUDGETING

GOVERNMENT FINANCE OFFICERS ASSOCIATION

Unclear Goals / Misaligned Programs

- Strategic planning goals often ignore an organization's core service areas and focus on new initiatives
- Budget decisions made within department silos tend to lack transparency
  - Lack of cooperation and coordination within the organization
  - Lack of alignment between departments and entire organization
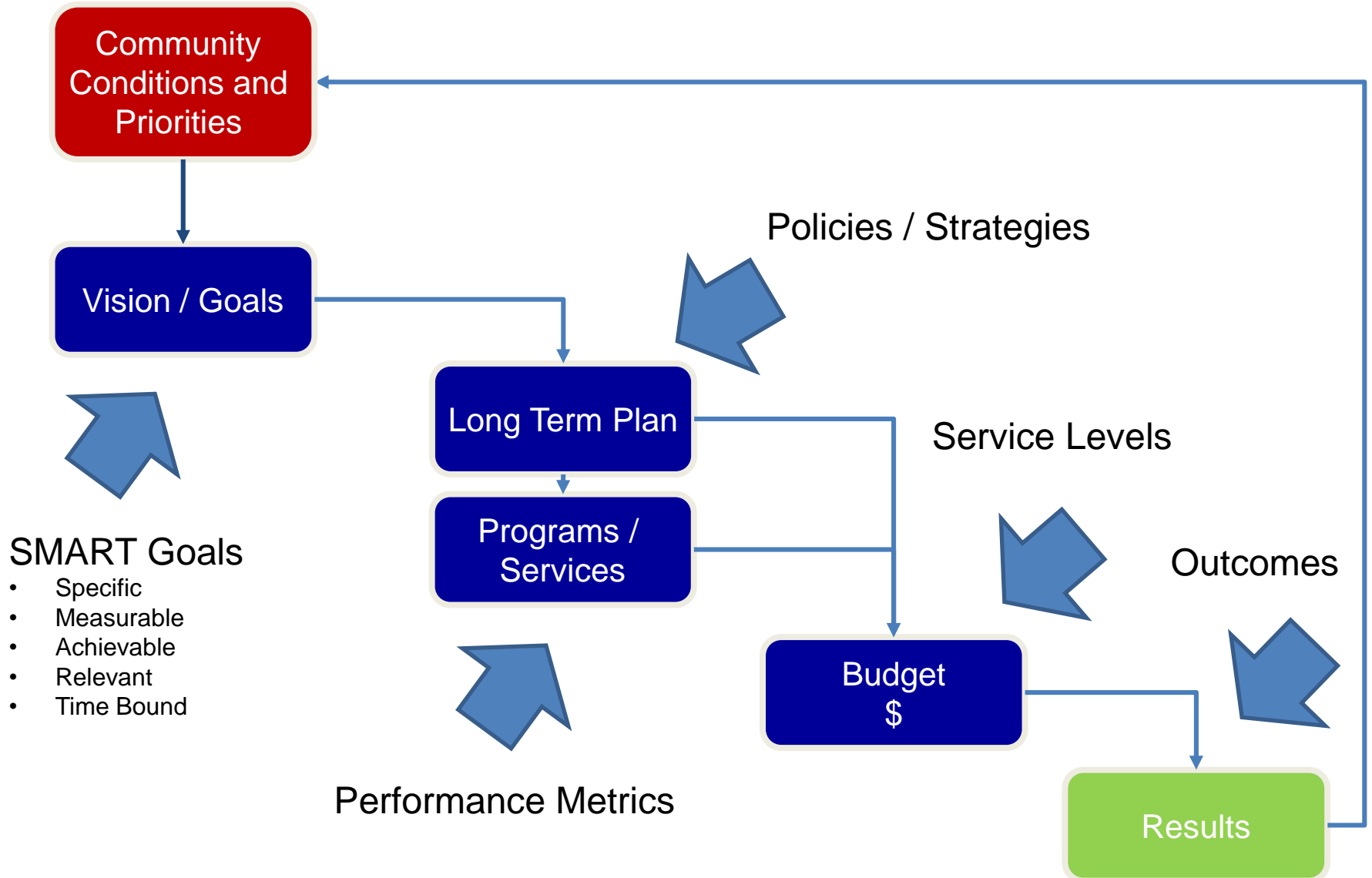
Goals

Goals

Programs

4

Budgeting Simplified.

○ Revenues and Expenses

○ Money and Results
  - "Goals with price tags"

Alignment of Budget to Community Priorities

Community Conditions and Priorities

Vision / Goals

Policies / Strategies

Long Term Plan

Programs / Services

Service Levels

Budget $

Outcomes

Results

SMART Goals
- Specific
- Measurable
- Achievable
- Relevant
- Time Bound

Performance Metrics

Questions for Discussion

- How to assess your situation?

- Where to start?

- How do you divide responsibilities? between elected officials, executive staff, finance, budget, and other departments?

- Who decides on priorities?

- How often should you do this?

POLLING QUESTION 1

- Does your organization have an adopted strategic plan that is used as a guide for budgeting?
  - A. Yes, we have a strategic plan and it is used as a guide for budgeting
  - B. We have strategic plan, but don't use it for budgeting
  - C. No, we don't have a strategic plan

Questions for Discussion

- How to assess your situation?

- Where to start?

- How do you divide responsibilities? between elected officials, executive staff, finance, budget, and other departments?

- Who decides on priorities?

- How often should you do this?

How to Get Valuable (and Real) Input from Citizens
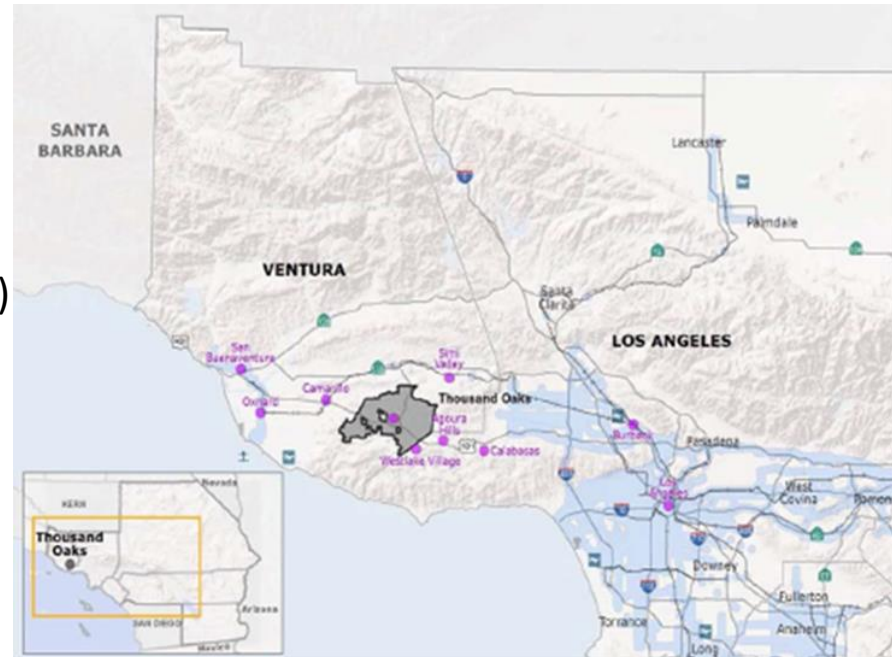
Brent Sakaida, Budget Officer

GFOA 3rd Annual Better Budgeting

City of
Thousand Oaks

City of Thousand Oaks Demographics

- Incorporated on October 7, 1964
- Located approximately 40 miles northwest of Downtown Los Angeles, halfway between Los Angeles & Santa Barbara County
- 2nd largest city in Ventura County (Pop. 130,196)
- 56 square miles
- Approximately 15,250 acres of Open Space
- Median Age: 43*
- Median Household Income: $108,290*
- Median Home Price: $655,000*

(* - 2016 US Census)

toaks.org

City of Thousand Oaks Budget

- Citywide FY 2019 Total Budget: $196,086,444

- General Fund FY 2019 Total Budget: $86,160,745

- CIP FY 2018 & 2019 Budget: $59,819,300

  – 115 Total Projects

- Biennial Budget

g

Community Engagement Timeline

Jan 2016
- Fiscal Sustainability City Council Meeting

May 2016
- City Council Goal Setting – Request for Community Engagement

1ˢᵗ Qtr 2017
- Creation of Online Budget Tool + Various Pop-Up Events / Promotion

May 2017
- City Council Goal Setting Meeting – Community Engagement Results

toaks.org

Community Engagement Overview

- Goals
    - Educate and engage community members about the municipal budget
    - Collect community priorities for future spending allocations
    - Create a flexible engagement "toolkit" for future projects

- Project Details
    - Consultants from Michael Baker Intl. & CivicMakers
    - Collaboration between CMO, PIO, & Finance
    - Rolled out in conjunction with the Community Attitude Survey

toaks.org

Community Engagement

- Webpage
- On-Line Budget Tool
- Media Campaign
  - Social Media
  - Ads
  - Printed Media
- Pop-Up Workshops

PSA – On-Line Budget Tool

On-Line Budget Tool

Allocation Questions

1. Police Services
2. Transit Operations
3. Library Services
4. Open Space
5. Senior Center
6. Teen Center

Sections

Change in Budget

$-1,380,000

Your budget has increased spending ($-1,380,000). If you're finished, <u>submit your choices</u>. Otherwise, cut activities or add revenues to balance the budget.

3. LIBRARY SERVICES

The Thousand Oaks Library is comprised of one main facility, the Grant R. Brimhall Library, and one branch library in Newbury Park. The Thousand Oaks Library offers computer classes and games and activities in the children's library. The Thousand Oaks Library is funded by property tax and general fund support.

Costs: $405,000.00

Would you increase, decrease, or maintain the current level of funding for the Library? ❶ *Learn more*

105%

Service levels would increase, potentially adding a full time librarian and two part-time aides, expanding the library programming and services, and allowing for mobile technology and library resources.

Comments

toaks.org

Budget Tool

Open-ended Questions

   1. Streets and Roads

   2. Traffic Congestion

   3. Cultural Affairs

   4. Economic Development

8. TRAFFIC CONGESTION

As part of the 2015 Community Attitude Survey residents were asked about services they felt were important to them as well as services they felt were not meeting their needs. One service area identified as needing attention was traffic congestion. As a result, the City installed Flashing Yellow Arrow signals at five intersection in the City, with plans for seven additional intersections in 2017.

What strategies should the City pursue to reduce traffic congestion? Learn more

9. CULTURAL AFFAIRS

The City of Thousand Oaks built and opened the Thousand Oaks Civic Arts Plaza in October 1994, consisting of Thousand Oaks City Hall, a 3-acre park and two theatres. The Cultural Affairs Department oversees Theatre operation for the Thousand Oaks Civic Arts Plaza's two theatres, as well as Arts Services, including Citywide Arts sponsorship and the Regional Art Museum project.

How do you think Cultural Affairs can be improved within the City? Learn more

toaks.org

Pop-Up Events

- Farmer's Market
- The Oaks Mall
- Coffee with the Chiefs
- Arbor Earth Day

Webpage

TOAKS.ORG/YOURBUDGET

- Splash page with background information, FAQ, email subscription, and link to online budget tool

4,265 visitors

- Primary sources:
  - Facebook
  - NextDoor
  - Acorn
- Avg. time on page: 5 minutes

Budget Tool

TOAKS.CITIZENBUDGET.COM

- 6 allocation questions
- 4 open-ended questions
- 2 demographics questions

- 1,268 visitors

•606 responses!

- 9 min avg. response time

Benefits to the City

- Meet and talk to our residents and stakeholders outside of City Hall
- Engage and educate residents and started to cultivate budget champions
- Educate residents of the tools available to them on the City's website
- Validated results of the City's "Community Attitude Survey"
- Residents were appreciative of staff being available to discuss various questions/topics related to the City

Conclusion

- Our community wants to engage with the budget!
  - The community is eager and willing to participate online
  - More can be done to reach those aged 18 - 45 and newer residents

- Community priorities:
  - Maintain or increase police services
  - Maintain or increase open space funding
  - Maintain or decrease transit investment
  - Maintain library, senior center and teen center funding
  - Optimize traffic flow; create more pedestrian and bike-friendly areas
  - Provide more support to small, local businesses

GFOA – Award for Excellence in Government Finance

- One of 10 Submissions recognized by the GFOA
  - Implementation of Best Practice for "Public Participation in Planning and Budgeting"

POLLING QUESTION 2

- Do you feel that your organization is successful with its citizen engagement efforts?
  A. Yes
  B. No

KCMO Departments by Goal

Finance and Governance

- Finance
- General Services
- Human Relations
- Human Resources
- Law
- City Manager
- Mayor/Council
- City Clerk
- City Auditor

Neighborhoods, Healthy Communities and Housing

- Health
- Neighborhoods and Housing Services
- Parks and Recreation

Planning, Zoning, and Economic Development

- Aviation
- City Planning and Development
- Convention and Entertainment Facilities

Public Safety

- Fire
- Municipal Court
- Police

Transportation and Infrastructure

- Public Works
- Water Services

Customer Service and Communication

- All Departments

Questions for Discussion

- How to develop programs?
- What is role of performance measures?
- How should you involve decision makers?
- How to communicate with stakeholders?

POLLING QUESTION 3

- How are performance measures used in your organization?
    - A. Performance measures are not used
    - B. Measures track key outcomes (community indicators) for the organization
    - C. Measures track basic workload statistics for operations, but are not really used in decision making
    - D. Measures track information at multiple levels and managers use information to help inform budget decisions and demonstrate accountability

"Circle of Life"