



Winnebago County

Rethinking Budgeting through Data-Driven Priority Based Budgeting



Chris Fabian, CEO
10-30-2023



ICMA

RETHINKING BUDGETING

WHY DO WE NEED TO RETHINK BUDGETING?

For more information, visit gfoa.org/rethinking-budgeting

**“the challenges facing today’s
leaders require
something different
from our budget process”**

Value Proposition #1: Reframing the Budget around Results



%)				Fund		Division		Object				
	2019	2018	ObjType	Code	Fund	Code	Division	Account Category	Code	Object	AcctComments	AcctL
0%	24,645	24,645	NonPersonnel	010	GENERAL FUND	4020	BUILDING INSPECTION	INTERNAL SERVICES	7340	WORKERS COMPENSATION		admin
0%	442	442	NonPersonnel	010	GENERAL FUND	4020	BUILDING INSPECTION	INTERNAL SERVICES	7515	EQUIP REPLACEMENT CHARGE		admin
0%	1,373	1,373	NonPersonnel	010	GENERAL FUND	4020	BUILDING INSPECTION	INTERNAL SERVICES	7520	EQUIPMENT SERVICES CHARGE		admin
0%	1,253	1,253	NonPersonnel	010	GENERAL FUND	4020	BUILDING INSPECTION	INTERNAL SERVICES	7535	VEHICLE REPLACEMENT CHARGE		admin
0%	51,501	51,500	NonPersonnel	010	GENERAL FUND	4020	BUILDING INSPECTION	SERVICES & SUPPLIES	7008	CONTRACT SERVICES		admin
7%	210,613	210,470	NonPersonnel	010	GENERAL FUND	4020	BUILDING INSPECTION	SERVICES & SUPPLIES	7011	PROFESSIONAL SERVICES		admin
0%	11,000	11,000	NonPersonnel	010	GENERAL FUND	4020	BUILDING INSPECTION	SERVICES & SUPPLIES	7020	CONFERENCE, TRAINING, & MEETING		admin
0%	600	600	NonPersonnel	010	GENERAL FUND	4020	BUILDING INSPECTION	SERVICES & SUPPLIES	7033	PRINTING & DUPLICATION		admin
0%	200	200	NonPersonnel	010	GENERAL FUND	4020	BUILDING INSPECTION	SERVICES & SUPPLIES	7036	UNIFORM CONTRACT		admin
0%	30,615	30,615	NonPersonnel	010	GENERAL FUND	4020	BUILDING INSPECTION	SERVICES & SUPPLIES	7040	COMPUTER MAINTENANCE		admin
0%	600	600	NonPersonnel	010	GENERAL FUND	4020	BUILDING INSPECTION	SERVICES & SUPPLIES	7054	REPAIR & MAINT-VEH & EQUIP		admin
0%	2,600	2,600	NonPersonnel	010	GENERAL FUND	4020	BUILDING INSPECTION	SERVICES & SUPPLIES	7114	FUEL		admin
0%	900	900	NonPersonnel	010	GENERAL FUND	4020	BUILDING INSPECTION	SERVICES & SUPPLIES	7122	MAINTENANCE SUPPLIES		admin
0%	5,515	5,515	NonPersonnel	010	GENERAL FUND	4020	BUILDING INSPECTION	SERVICES & SUPPLIES	7124	MEMBERSHIP/DUES/SUBSCRIPTION		admin
0%	1,500	1,500	NonPersonnel	010	GENERAL FUND	4020	BUILDING INSPECTION	SERVICES & SUPPLIES	7134	OFFICE SUPPLIES		admin
0%	62	62	NonPersonnel	010	GENERAL FUND	4020	BUILDING INSPECTION	SERVICES & SUPPLIES	7136	POSTAGE		admin
0%	3,000	3,000	NonPersonnel	010	GENERAL FUND	4020	BUILDING INSPECTION	SERVICES & SUPPLIES	7142	TRAVEL AND MEALS		admin
0%	3,400	3,400	NonPersonnel	010	GENERAL FUND	4020	BUILDING INSPECTION	SERVICES & SUPPLIES	7220	TELEPHONE		admin
0%	4,940	4,940	NonPersonnel	010	GENERAL FUND	4020	BUILDING INSPECTION	SERVICES & SUPPLIES	7320	LIABILITY INSURANCE		admin
0%	1,100	1,100	NonPersonnel	010	GENERAL FUND	4010	PLANNING	CAPITAL OUTLAY	7420	FURNISHINGS & FIXTURES		admin
	0	0	NonPersonnel	360	VALERO GNSC	4010	PLANNING	CAPITAL OUTLAY	9999	PROJECT HOLDING ACCT		admin
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Diff(val)	Diff(%)	2019	2018	ObjType	Fund Code	Fund	Division Code	Division	Account Category	Object Code	Object	AcctComments	AcctL
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\$ 143.27	7%	210,613	210,470	NonPersonnel	010	GENERAL FUND	4020	BUILDING INSPECTION	SERVICES & SUPPLIES	7011	PROFESSIONAL SERVICES		admin
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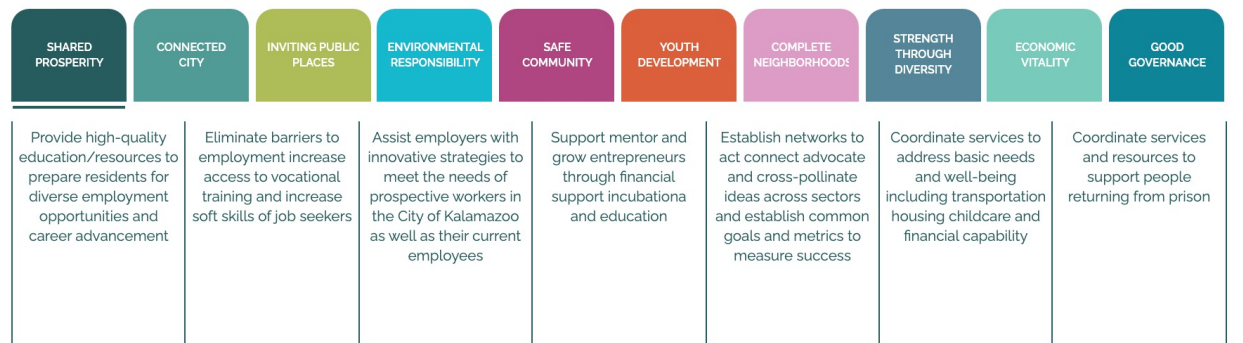
Are we getting
Safer
and More
Prosperous?

Are we funding
Economic
Vitality?

How is this
budget building
Efficiency?

VISUALIZATION

Visualize Your Budget From a Results-first Perspective

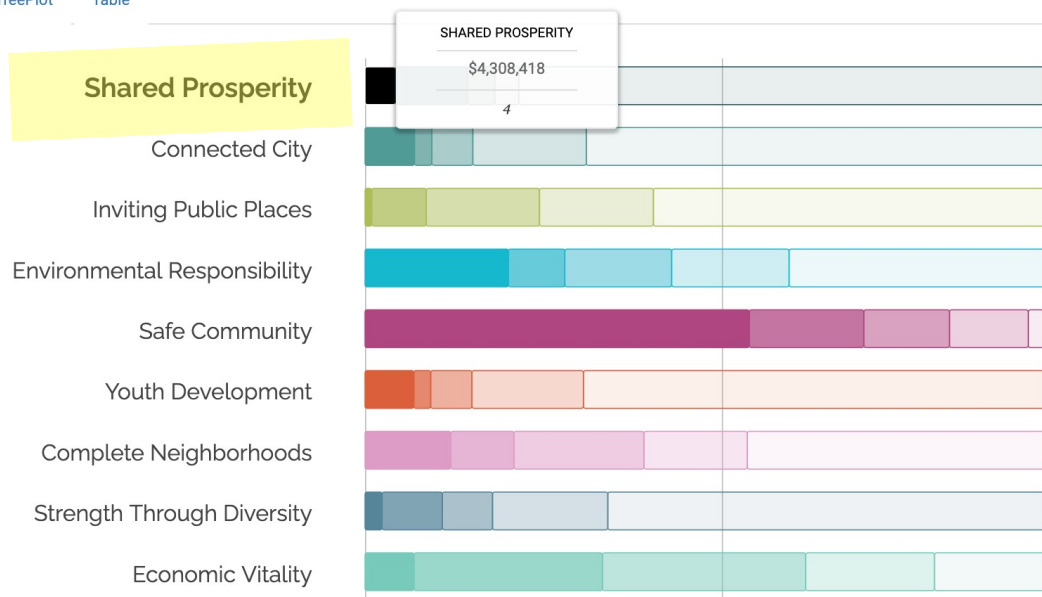


Select Tabset: Results

Select Budget: FY20

Select a Service Area: All Available

Summary TreePlot Table



STRATEGIC VISION GOAL MAP FOR SHARED PROSPERITY													
FY				Fund		Division		Object		AcctComments	AcctL		
	2019	2018	ObjType	Code	Fund	Code	Division	Account Category	Code			Object	
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Value Proposition #2:

Budget Decisions are Driven by Priorities

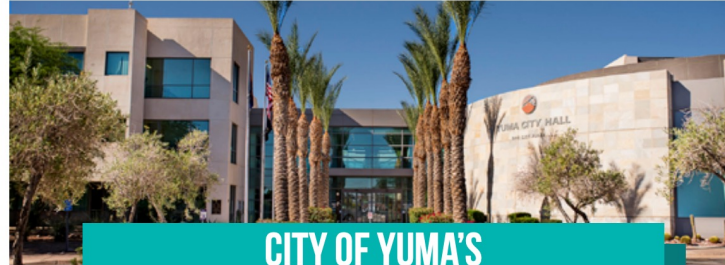




STRATEGIC PLAN FOR THE CITY OF YUMA, ARIZONA 2021-2025

UPDATE APPROVED BY CITY COUNCIL
ON APRIL 21, 2021

INITIAL STRATEGIC PLAN ADOPTED BY CITY COUNCIL ON
DECEMBER 16, 2020



CITY OF YUMA'S VISION AND STRATEGIC OUTCOMES

VISION

Yuma is a thriving, safe and prosperous community with opportunities powered by innovation, partnerships, collaboration and robust education – a unique place that all generations are proud to share.

STRATEGIC OUTCOMES

SAFE & PROSPEROUS

Yuma is a safe and prosperous city that supports thriving businesses, access to education, and multi-generational opportunities.

ACTIVE & APPEALING

Yuma plans and leverages its natural resources, public spaces and cultural amenities to support an active and appealing community.

CONNECTED & ENGAGED

Yuma is connected and engaged through active communication, forward-looking partnerships, and ongoing public involvement.

UNIQUE & CREATIVE

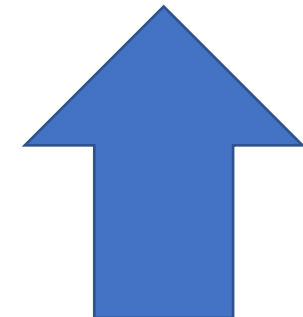
Yuma is a unique and creative community, built on our shared history, sense of place, and civic pride.

RESPECTED & RESPONSIBLE

Yuma is a trusted steward of City resources; relied upon to provide premier services and regional leadership.

2021 - 2022 Operating Budget Review Budget Initiatives

Program Description	Department	Core Service	Category	Taxation	
				2021	2022
Service Reduction	Transit	Yes		(1,100,000)	(1,100,000)
Parking Lot Snow Removal	Facility Services	Yes	Safety	(76,700)	(76,800)
Weed Act Enforcement	Regulatory Services	Yes		(90,000)	(90,000)
Parks Maintenance Option 1	Parks	Yes	KPMG	(128,500)	(128,500)
Parks Lifecycle Replacement Option 1	Parks	Yes		(75,000)	(75,000)
Surface Repairs and Boulevard Restoration Option 2	Parks	Yes		(33,000)	(33,000)
Pest Management Option 1	Parks	Yes		(43,400)	(43,400)
Pest Management Option 2	Parks	Yes	Safety	(86,500)	(86,500)
Playgrounds Option 1	Parks	Yes		(33,800)	(33,800)
Public Event Support Option 2	Parks	Yes		(40,000)	(40,000)
Reduction of Administrative Support Services	Infrastructure Administration	No		(16,500)	(16,500)
Asset Management Special Services & Studies and Contractual Services	Infrastructure Administration	No		(11,100)	(11,100)
Reduction in Special Services & Studies	311	No		(17,300)	(17,300)
Transportation Admin	Transportation	No	Safety	(56,000)	(56,000)
Sidewalk, Pathway and Bridge Maintenance Option 1	Transportation	Yes	Safety	(55,000)	(55,000)
Sidewalk, Pathway and Bridge Maintenance Option 2	Transportation	Yes		(85,000)	(85,000)
Traffic Operations and Signals	Transportation	Yes		(135,000)	(135,000)
Road Maintenance and Operating Transfers Option 1	Transportation	Yes		(200,000)	(200,000)
Street Sweeping Option 1	Transportation	Yes		(85,000)	(85,000)
Transportation Snow and Ice Option 1	Transportation	Yes		(190,000)	(190,000)
Reduction in Service Level - Junior Hockey Games	ENMAX	Yes	Safety	(60,750)	(60,750)
Custodial Service Reduction	Facility Services	Yes	Safety	(282,000)	(282,000)
Break Relief Reduction	PSCC	No		(311,000)	(311,000)
Reduce RS Peak Position Hours	PSCC	Yes		(100,000)	(100,000)
NOKA Spay/Neuter Program Grant	Regulatory Services	No		(45,000)	(45,000)
General Maintenance Option 1	Parks	Yes		(198,500)	(198,500)
Seasonal Displays Option 1	Parks	No		(141,000)	(141,000)
Dryland Mowing Option 2	Parks	Yes	KPMG	(105,000)	(105,000)
Parks Maintenance Option 2	Parks	Yes	KPMG	(297,500)	(297,500)
General Maintenance Option 2	Parks	Yes		(463,500)	(463,500)
Seasonal Displays Option 2	Parks	No		(155,000)	(155,000)
Playgrounds Option 2	Parks	Yes		(63,000)	(63,000)
Parks Lifecycle Replacement Option 2	Parks	Yes		(200,000)	(200,000)
Street Sweeping Option 2	Transportation	Yes		(285,000)	(285,000)
Road Maintenance and Operating Transfers Option 2	Transportation	Yes		(400,000)	(400,000)
Transportation Snow and Ice Option 2	Transportation	Yes		(455,000)	(455,000)
Lifecycle Reduction Option 1	Facility Services	Yes	Lifecycle	(212,609)	(243,181)
Lifecycle Reduction Option 2	Facility Services	Yes	Lifecycle	(383,601)	(449,272)
Increase User Fees	Rec & Culture	No	KPMG	(200,000)	(200,000)
Grants & Fee For Service	Rec & Culture	No	KPMG	(171,000)	(171,000)
Fritz Sick Centre/SCO Janitorial	Rec & Culture	Yes		(266,100)	(266,100)
Increase to User Fees	HSNC	No		(5,000)	(5,000)
Security Patrols at Transit Park N Ride	Facility Services	Yes	Safety	(142,700)	(142,700)
Closure of Fritz Sick Pool	Rec & Culture	Yes		(359,540)	(359,540)
Civic Ice Centre Closure	Rec & Culture	Yes		(263,419)	(263,419)
Westminster Pool Closure	Rec & Culture	Yes		(137,626)	(137,626)
Information Services - Materials Reduction Option 1	HSNC	No		(10,192)	(10,192)
Information Services - Materials Reduction Option 2	HSNC	No		(16,884)	(16,884)
Conservation Projects Reduction	HSNC	Yes		(33,000)	(33,000)
Relief Coverage	Transit	No		(111,145)	(111,145)
Allied Arts Council Fee for Service	Community - Council Referral		FFS	95,567	95,567
Southern Alberta Art Gallery Fee for Service	Community - Council Referral		FFS	76,000	76,000
Southern Alberta Ethnic Association Fee for Service	Community - Council Referral		FFS	102,000	102,000
Nikka Yuko Japanese Garden Fee for Service	Community - Council Referral		FFS	171,190	171,190
Lethbridge Sport Council Fee For Service	Community - Council Referral		FFS	55,000	55,000
Mayor & City Council Wage Freeze	City Council			(19,700)	(27,900)
Mayor & City Council Travel & Per Diem	City Council			(56,000)	(56,000)
Eliminate Business License Fee Increase	Regulatory Services			33,000	33,000
				(16,185,886)	(17,077,249)
				(15,990,018)	(16,938,034)
				(1,615,801)	(1,646,373)
				(14,374,217)	(15,291,661)
Total Option 1s					
Total Contributed (10%)					



CITY OF FLAGSTAFF

Key Community Priorities



05-Community Development

Below is a summary of programs and their total requested amount and potential new total cost.

Quartile	Program	Total Cost	Requested Amount	Proposed Total Cost
4	CD Personnel	\$23,591	\$4,000	\$27,591
2	Inspections	\$1,488,475	\$200	\$1,488,675
1	Planning Discretionary Review	\$231,757	\$512	\$232,268
2	Code Compliance	\$376,883	\$1,252	\$378,135
1	Regional Plan Update and Management	\$112,080	\$202,716	\$314,796
2	Neighborhood & Specific Plans	\$137,007	\$512	\$137,519
1	Zoning and Subdivision Code Management	\$126,370	\$810	\$127,179
2	Affordable Housing Unit Creation	\$177,282	\$110,000	\$287,282
1	Community Development Block Grant Management	\$1,407,201	\$325,000	\$1,732,201
4	Intra-divisional Engineering Assistance and Support	\$39,288	\$35,000	\$74,288
1	Traffic Systems Management	\$224,176	\$73,900	\$298,076
3	Direct Rental Assistance	\$4,863,450	\$1,636,550	\$6,500,000
2	Engineering Plan/Permit Review	\$405,868	\$22,000	\$427,868
2	Section 8 Client Management	\$145,443	\$50,750	\$196,193
1	Public Housing: Residential Property Maintenance	\$1,732,136	\$20,500	\$1,752,636
2	Housing Community Information and Referrals	\$39,806	\$10,000	\$49,806
2	Plan / Permit / Project Review	\$1,058,857	\$1,250	\$1,060,107
Total		\$12,589,669	\$2,494,950	\$15,084,619

Below is a detailed outline of the impact every request has on program listed above.

Program and Request Description	Requested Total	Decision Status
<u>CD Personnel</u>		
Certified Public Manager	\$4,000	Approved
<u>Inspections</u>		
Inspection supplies and equipment	\$200	Approved
<u>Planning Discretionary Review</u>		
Additional Regional Plan Advertising	\$512	Approved
<u>Code Compliance</u>		
Additional Regional Plan Advertising	\$1,252	Approved
<u>Regional Plan Update and Management</u>		
Software to support Scenario Planning and Hybrid Public Engagement	\$0	Approved
Additional Printing Costs for the Regional Plan Update	\$1,800	Approved
Writer/editor for the Regional Plan Update	\$20,000	Approved



Regional Plan Update and Management

Program Description

An update to the Regional Plan is required every 10 ten years which must be sent to the voters for ratification. The Regional Plan is the General Plan for the City of Flagstaff. The General Plan is a comprehensive long-range plan for the development of the City and includes statement of community goals and policies, maps, concept plans, and strategies. It covers a wide variety of topics including housing, business, recreation, open space, natural resources, and public facilities. Once a plan is approved annual reports are prepared on the statistical data that supports the Regional Plan. Prepare, process and coordinate amendments to the Regional Plan.

Program Budget

	Total Cost	Requested Amount	Proposed Total Cost
Personnel	\$98,274	\$0	\$98,274
NonPersonnel	\$13,806	\$1,800	\$15,606
Revenue	\$0	\$0	\$0
Total	\$112,080	\$1,800	\$113,880

Budget Request Description

Additional Printing Costs for the Regional Plan Update

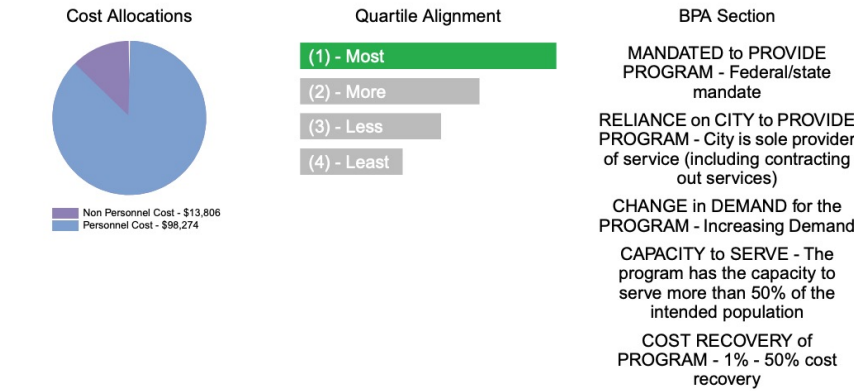
Box Choices

How does this request impact the program service level?:
Maintains service level

Is this request Recurring or One-time? (select one):
One-time

Is this a new funding request or a base budget reallocation request?: New Funding Request

Priority Based Budgeting Analysis



Community Development

summary of programs and their total requested amount and potential new total

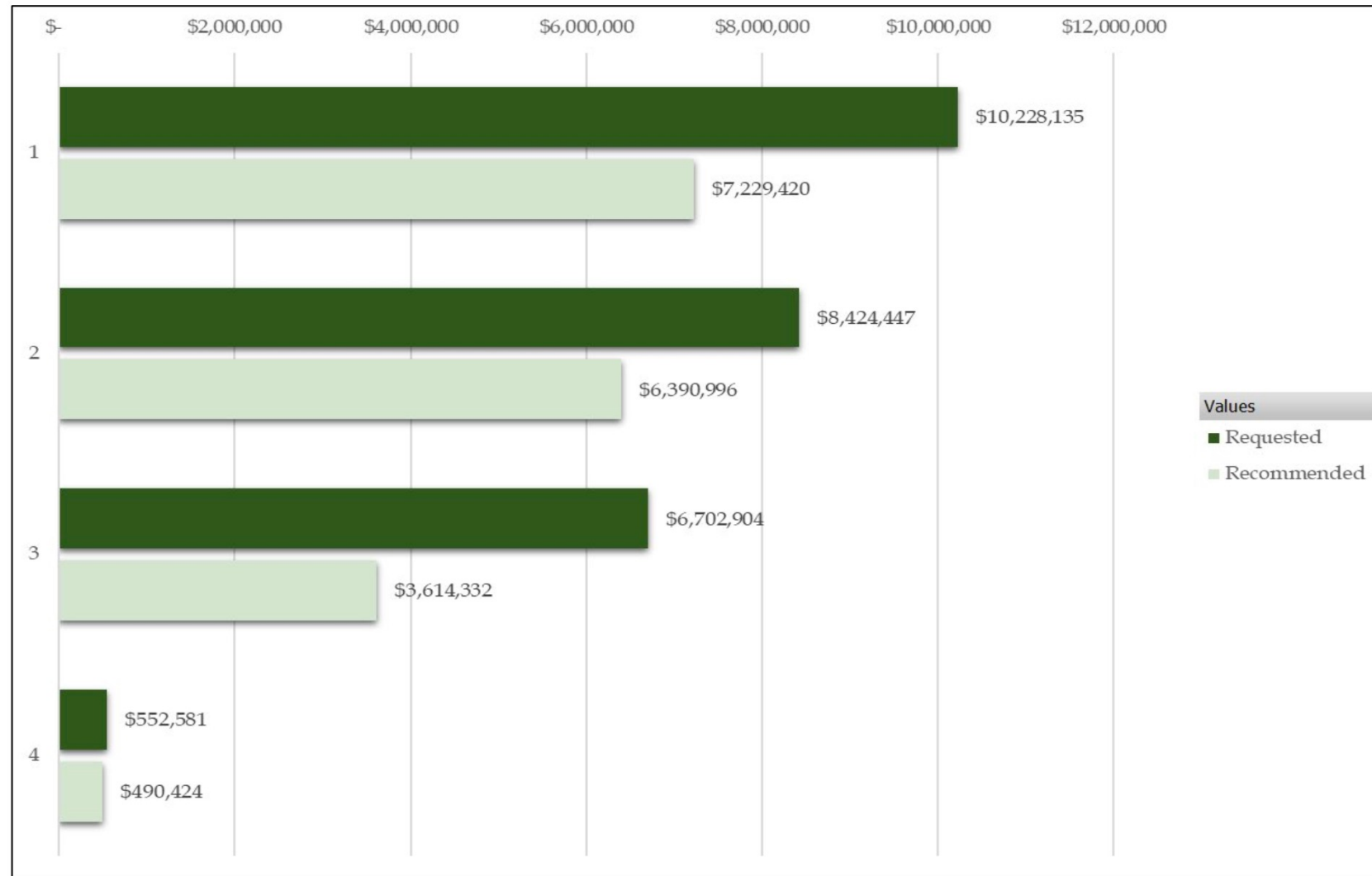
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pliance		
al Regional Plan Advertising	\$1,252	Approved
an Update and Management		
e to support Scenario Planning and Hybrid Public Engagement	\$0	Approved
al Printing Costs for the Regional Plan Update	\$1,800	Approved
ditor for the Regional Plan Update	\$20,000	Approved



Total Budget Requests* – All Funds



Total Requested:
\$25,908,067

Total Recommended:
\$17,725,173

*Excludes capital

Value Proposition #3: Opportunities for Readily Available Resources



PBB Blueprint

To Fund the Future

We have new needs...

... to launch new programs to tackle emerging challenges.
... to enhance current programs that need additional resources.

Free Up & Re-Allocate Resources

Sourcing

- Can we leverage partners, or source services with public/private providers, in order to free up our resources?
- Focus on the “irreducible core”

Efficiencies

- Can we apply technology to automate or free up human resources?
- Can we augment service delivery with volunteers?

Service Levels

- Can we apply technology to automate or free up human resources?
- Can we augment service delivery with volunteers?

Generate New Revenue

Fees, Charges

- Do our fees cover the costs of providing the service?
- Can we in-source, or provide any services regionally for a fee?

Grant Funding

- Are we reporting the true cost of services to granting agency?
- Can we recoup additional funding, or attain new grant opportunities?

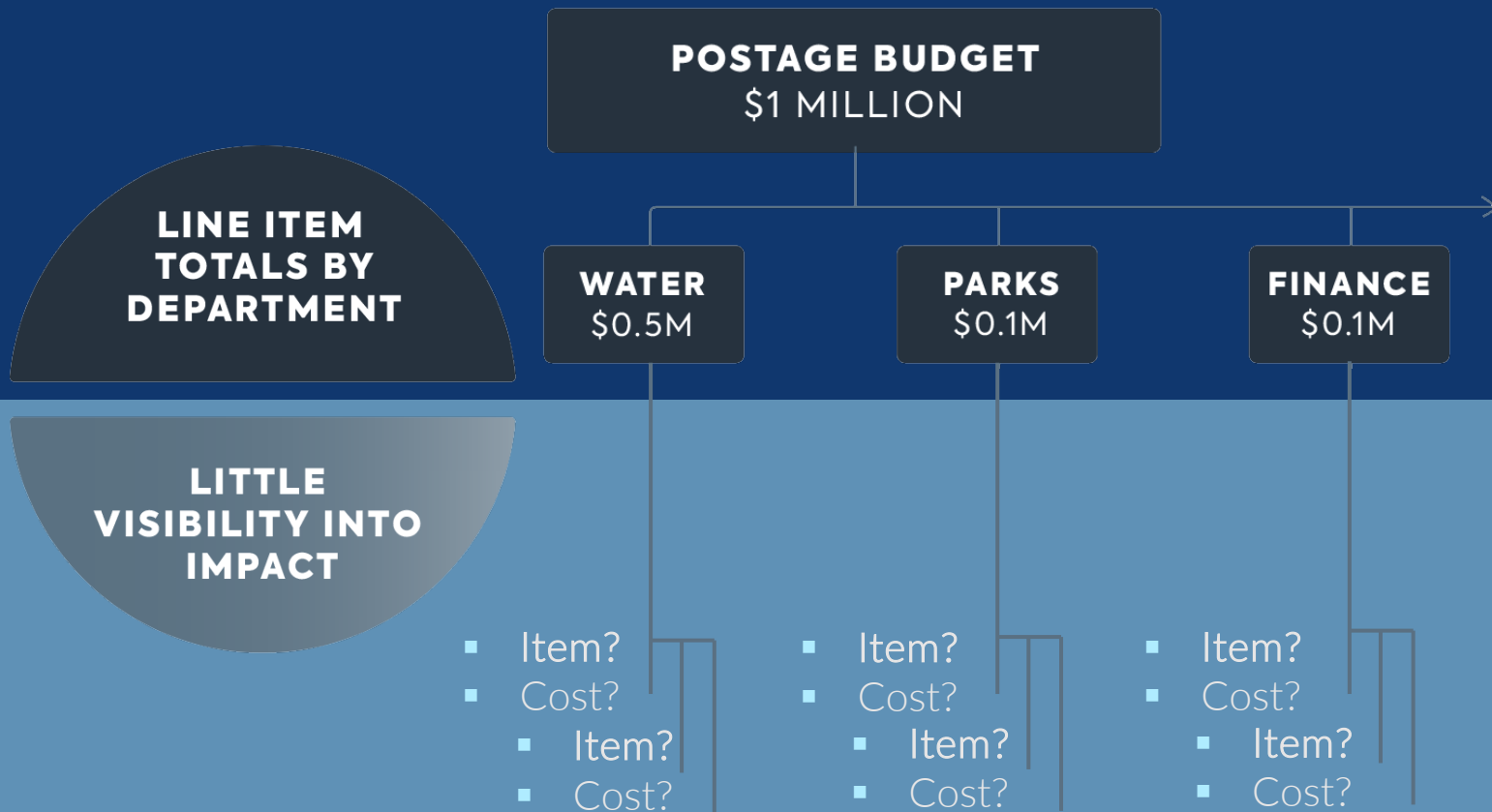
Taxes, Rates

- Last resort
- Do we have no options left besides raising additional revenue from tax and rate payers?

We have no new needs...

- Maintain, preserve current services.
- Or, seek to lower rates or refund tax-payers

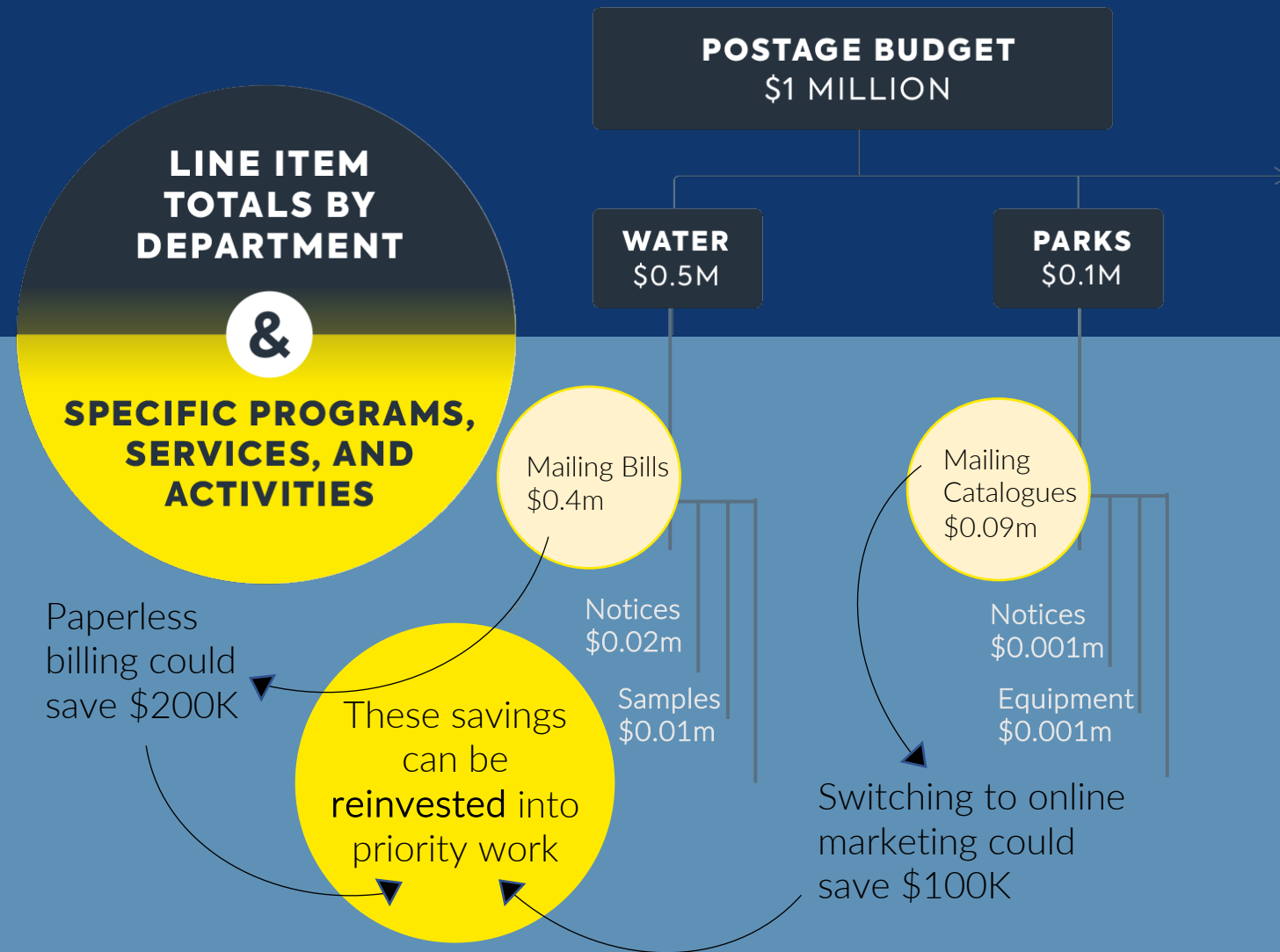
WHAT DO YOU SPEND?



FROM LINE ITEMS TO BETTER ALIGNMENT

- Traditional budgets track line items (such as postage, paper, gas and tires) by department (Parks, Public Works, Legal, etc.).

PROGRAM BUDGETING

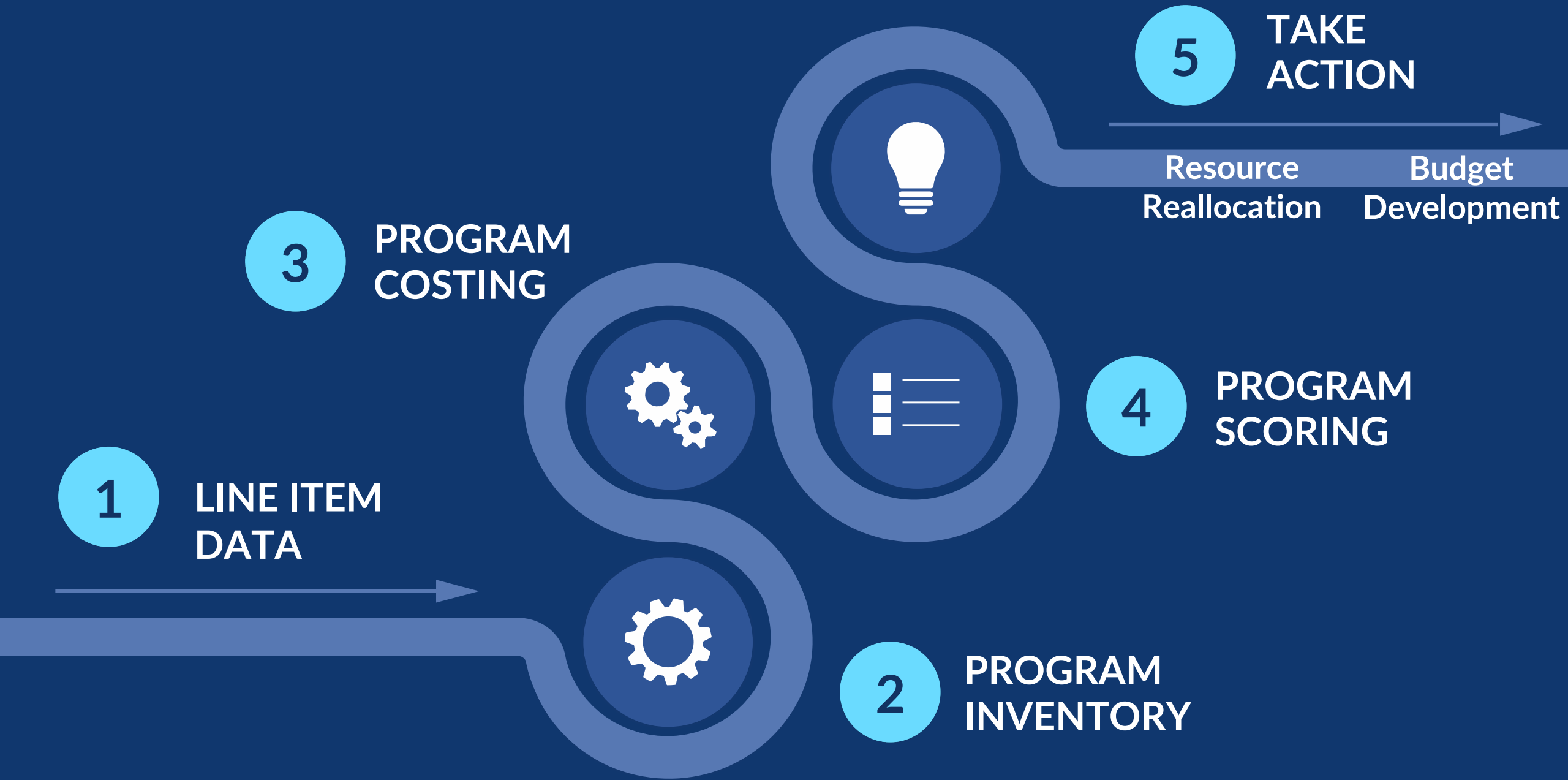


HOW IT DIFFERS FROM TRADITIONAL BUDGETING

- PBB tracks costs and revenues under distinct programs, services, and activities, such as snow removal, trail maintenance, and utility billing

Priority Based Budgeting Process Steps





Rethinking Budgeting through Data-Driven Priority Based Budgeting

October 03, 2023

4:00pm to 5:00pm



Chris Fabian, CEO
Mike Bailey, PBB Director